CONCEPT

HR Mergers and Acquisitions: Workforce Liabilities, Talent Retention and HR Integration

1 – 5 November 2027
Paris - Right Bank business hotel



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Ref: 964_21851 **Date:** 1 – 5 November 2027 **Location:** Paris - Right Bank business hotel **Fees:** 23500 SAR

Introduction:

HR mergers and acquisitions work often starts too late: the price is agreed before anyone has counted the employee liabilities, checked the employment contracts or asked which people the deal cannot afford to lose. Pay gaps, unfunded end-of-service provisions and payroll cut-over failures then surface after signing. This Core Concept course gives HR business partners, reward specialists and HR operations leads the people due diligence and HR integration methods to protect a transaction. Participants build an HR Due Diligence Checklist and HR Integration Plan for a case acquisition.

Course Objectives:

- Map HR deliverables to each phase of a transaction, from target screening through signing, closing and the first hundred days
- Run people due diligence on headcount, employment contracts, employee liabilities, end-of-service and pension provisions and pending employee disputes
- Identify critical roles and flight-risk employees and structure retention agreements with vesting, clawback and cost limits
- Design grade mapping and pay, benefits and HR policy harmonisation options with cost and fairness analysis
- Plan HRIS and payroll cut-over, redundancy and staff transfer steps with a documented fair process
- Build an HR Due Diligence Checklist and HR Integration Plan with Day 1 readiness actions and HR workstream governance

Target Audience:

- HR business partners who advise deal sponsors and line leaders on the people side of a transaction
- Reward and benefits specialists responsible for grade structures, pay ranges, allowances and benefit plans
- HR operations and payroll leads accountable for employee records, HRIS data and the monthly pay run
- HR managers assigned to an HR integration workstream or people due diligence team
- Employee relations specialists who handle consultation, grievances and contract changes

Course Outline:

Day 1: HR in the Deal Lifecycle and the People Risk Picture

- Deal Lifecycle Map: HR Inputs at Screening, Due Diligence, Signing, Closing and Post-Close
- Share Purchase, Asset Purchase and Statutory Merger: What Each Means for Employment Contracts
- Clean Team Rules and Confidential Handling of Employee Data Before Closing
- People Risk Heat Map for Acquirer and Target Workforces
- HR Deal Team Roles, Interfaces with Legal, Finance and Advisers

Day 2: People Due Diligence and Culture Due Diligence

- HR Document Request List and Virtual Data Room Review Protocol
- Headcount, Contract Type and Employee Cost Census Reconciliation
- End-of-Service, Pension and Accrued Leave Provision Testing
- Employee Dispute, Grievance and Labour Claim Exposure Log
- Culture Due Diligence: Values Survey, Decision-Making Style and Leadership Interviews

Day 3: Key Talent Retention, Grade Mapping and Reward Harmonisation

- Critical Role Identification and Flight-Risk Scoring Matrix
- Retention Agreement Design: Stay Bonus, Vesting Schedule and Clawback Terms
- Job Evaluation and Grade Mapping Between Two Grading Structures
- Pay Range, Allowance and Benefit Plan Harmonisation Cost Model
- HR Policy Gap Comparison and Harmonised Policy Set Sequencing

Day 4: Workforce Transfer, HRIS and Payroll Cut-Over and Engagement Risks

- Combined Entity Structure Options and Role Duplication Analysis
- Redundancy Selection Criteria, Consultation Steps and Fair Process Records
- Employee Transfer Letters, Changed Terms and Consent Handling
- HRIS Data Migration and Parallel Payroll Run Checklist
- Integration Communication Calendar, Manager Briefing Packs and Pulse Surveys

Day 5: Case Acquisition: HR Due Diligence Checklist and HR Integration Plan

- Case Acquisition Pack: Target Workforce Data, Contracts and Reward Schedules
- Case Work: People Due Diligence Red Flag Report and Liability Estimate
- Case Work: Retention Shortlist and Reward Harmonisation Recommendation
- HR Integration Workstream Office Set-Up and Day 1 HR Readiness Checklist
- HR Due Diligence Checklist and HR Integration Plan Defence to a Deal Sponsor Panel

Skills You Will Gain:

- People Due Diligence
- Employee Liability Assessment
- Culture Due Diligence
- Retention Agreement Structuring
- Grade Mapping
- Reward Harmonisation Costing
- Payroll Cut-Over Planning
- Fair Redundancy Process

Why Attend This Course:

- Leave with an HR Due Diligence Checklist and HR Integration Plan built on a case acquisition and ready to adapt to a live deal
- Put a figure on employee liabilities and pay gaps early enough for the deal team to reflect them in price and terms
- Keep the people who carry the value of the deal by offering retention terms that are targeted and affordable
- Compare people due diligence and HR integration practice with HR peers from manufacturing, services, healthcare and public organisations

Conclusion:

The people side of a transaction decides much of its value, and HR can only protect it with evidence gathered before signing and a plan ready for the first day. The week moves from HR's place in the deal lifecycle, through people and culture due diligence, key talent retention, grade mapping and reward harmonisation, to workforce transfer, redundancy with fair process, HRIS and payroll cut-over and employee communication. The final day produces an HR Due Diligence Checklist and HR Integration Plan for a case acquisition.