# Talent Management in Mergers and Acquisitions Training Course

19 – 23 September 2027
Marbella

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## Overview

Talent Management in Mergers and Acquisitions Training Course is a one-week professional course for HR leaders, deal people leads, integration managers, talent teams, and business leaders. Participants build an M&A Talent Integration Plan that links the deal thesis to critical capabilities, talent due diligence, retention, leadership continuity, fair role selection, onboarding, and post-close measures. The course treats M&A talent management as a governed deal workstream rather than a generic change or engagement programme. Agile Leaders Training Center develops practical people integration capability.

## Who Should Attend

- HR leaders accountable for the people workstream of a transaction
- M&A and integration managers coordinating Day One and post-close activity
- Talent and workforce professionals assessing critical roles and capability
- Business unit leaders selecting, retaining, and onboarding people into the combined organization
- HR business partners supporting affected functions and employee groups

Participants should influence talent or integration decisions. The course excludes deal valuation, financial modelling, legal due diligence, redundancy law, payroll migration, and generic culture-change programmes.

## Deal Contexts and Functions

The methods apply to acquisitions, mergers of equals, capability acquisitions, carve-outs, and cross-functional integrations where workforce continuity affects the deal thesis.

- Human resources, talent, organization design, and people analytics
- Corporate development, integration management, and transformation offices
- Operations, technology, product, customer, compliance, and professional functions
- Regional and cross-border teams requiring coordinated talent decisions
- Leadership teams responsible for operating-model and capability continuity

## Learning Objectives

By the end of this course, participants will be able to:

- Translate the deal thesis into critical role, capability, and leadership requirements
- Conduct people due diligence within access, confidentiality, and timing constraints
- Identify critical talent and assess departure impact and probability
- Design fair and transparent selection, placement, and escalation controls
- Sequence retention, communication, onboarding, and integration milestones
- Track talent outcomes, integration risks, employee signals, and corrective actions
- Govern decisions through clear ownership, documentation, and review forums

## Course Agenda

### Day 1: Deal Thesis and People Due Diligence

- Deal Thesis to Talent Dependency Map
- People Due Diligence Question Set
- Critical Capability and Knowledge Concentration Profile
- Leadership, Workforce, and Culture Risk Register
- Pre-Close Access and Confidentiality Control Map

### Day 2: Critical Talent and Retention

- Critical Role and Talent Identification Matrix
- Departure Impact and Flight-Risk Assessment
- Retention Scope and Eligibility Governance
- Financial and Nonfinancial Retention Lever Canvas
- Retention Wave, Owner, and Milestone Plan

### Day 3: Leadership, Selection, and Placement

- Combined Organization Role Requirement Profile
- Leadership Continuity and Appointment Sequence
- Fair Selection Criteria and Evidence Standard
- Candidate Pool, Conflict, and Bias Controls
- Talent Selection Office Decision Tracker

### Day 4: Day One and Workforce Integration

- Day One Role and Reporting Clarity Pack
- Manager Communication and Employee Question Map
- New-Role Onboarding and Team Formation Plan
- Capability Transfer and Knowledge Continuity Actions
- 30-, 60-, and 100-Day Talent Integration Milestones

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## Day 5: Measures, Governance, and Adaptation

- Critical Talent Retention and Vacancy Dashboard
- Selection, Placement, and Mobility Outcome Review
- Employee Signal and Integration Risk Monitor
- Talent Workstream Governance and Escalation Calendar
- Capstone Exercise: M&A Talent Integration Plan

## Practical Exercises

Participants work with transaction scenarios to make time-bound decisions while protecting fairness, confidentiality, business continuity, and the capabilities on which the deal depends.

- Map the people and capability dependencies behind a deal thesis
- Prioritize critical talent using impact, scarcity, knowledge, and flight risk
- Design a transparent selection and placement process for overlapping roles
- Build Day One communication and onboarding for newly appointed teams
- Review talent measures and adjust a 100-day integration plan

## Course Outputs

- People Due Diligence and Talent Risk Pack
- Critical Talent Retention Portfolio
- Leadership and Role Selection Governance Pack
- Day One and 100-Day Talent Milestone Plan
- M&A Talent Integration Plan with owners, measures, and escalation routes

## FAQs

### When should M&A talent management begin?

M&A talent management begins when the deal thesis and permitted diligence access allow leaders to identify the capabilities, roles, and leadership on which value and continuity depend. Detailed employee decisions must follow applicable confidentiality and legal controls.

### What does people due diligence examine?

People due diligence examines workforce composition, critical capabilities, leadership depth, knowledge concentration, employment structures, incentives, retention exposure, organization dependencies, culture signals, and integration constraints.

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## How should critical talent be identified?

Critical talent should be identified through role and capability evidence, not status alone. The review considers business continuity, scarce knowledge, customer or regulatory dependencies, future capability, performance evidence, departure impact, and flight risk.

## How can selection remain fair during a merger?

A fair process defines future-role requirements, eligible candidate pools, evidence standards, decision rights, conflicts, bias controls, documentation, communication, appeals or escalation routes, and consistent timing across both legacy organizations.

## Which post-merger talent integration measures matter?

Useful measures include critical-talent retention, unwanted attrition, vacancy duration, appointment completion, onboarding readiness, mobility, capability coverage, employee signals, milestone delivery, and unresolved people risks.

## Conclusion

Participants leave with an M&A Talent Integration Plan connecting diligence evidence to retention, leadership continuity, fair selection, Day One clarity, onboarding, capability transfer, measures, and governance. The plan helps the combined organization protect the people and capabilities required by the deal without reducing integration to bonuses or broad communication activity.