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MASTERING REWARD SERIES

SHORT COURSES FOR REWARD PROFESSIONALS

GET FRESH WITH REWARD

E-reward offers the UK's largest reward training programme.

Accelerate your career path whether you're a current reward professional or an individual seeking to expand your reward skills.

- **Always fresh and current**
- **Introductory reward classes through to detailed niche topics**
- **Training is made up of case studies, round tables, workshops and collaboration**
- **Top notch teachers who regularly get 5* feedback**
- **We cover the reward big picture and all the components that fit into it**

FORTHCOMING COURSES

Excel Skills for Reward Professionals – Intermediate & Advanced

An Introduction to Executive Pay

The Directors Remuneration Reporting Regulations

Reward Management – Introductory & Intermediate

Expatriate Management for Reward Professionals

Mergers and Acquisitions for Reward Professionals

Elements of Sales Compensation

BOOK NOW web: **www.e-reward.co.uk** email: **paul@e-reward.co.uk** tel: **0161 432 2584**

MASTERING REWARD

A specialist training programme from E-reward.co.uk and some of the brightest names from today's reward scene

We've had numerous requests from E-reward subscribers among Europe's leading companies to create a series of short courses that will provide practical, very specific reward support in areas that resonate with today's challenging business environment.

The result is a batch of training events launched in conjunction with the best names in reward today. Each reward course will be highly practical with 100% up-to-the-minute information based on the exhaustive research we carry out every month.

Some of the courses are designed for participants new to the field of reward, while others are recommended for more experienced professionals.

COURSE DATES

Training courses in the **MASTERING REWARD** series are held in London. They are delivered by some of the most distinguished names in reward management in the UK.

For course dates and availability, please visit:

www.e-reward.co.uk/education/mastering-reward

COURSE TUTORS

We have teamed up with some of the brightest names from today's reward scene to deliver our portfolio of **MASTERING REWARD** training courses.

- Our tutors will open their huge bank of knowledge and let you know how you can achieve outstanding results in reward.
- Course leaders are guaranteed to be some of the brightest people in reward we've ever met. Known for always seeing things in new ways, thinking of clever shortcuts to use and breakthrough systems that are easily applied, our tutors will instantly tune in to any issues you have and aim to solve them.
- Attending a course led by any one of our faculty will pay off, many times over.

IN-HOUSE TRAINING

YOUR PLACE, NOT OURS

If you have a team of five or more, why not hold a private course at a venue of your choice? Our experts come to you and the course is tailored to fit your requirements.

- Customised content – we can use your own case studies
- Convenient
- Cost effective
- Confidential
- Top of their field tutors

We can provide full event administration support.

Email us to discuss your training needs: paul@e-reward.co.uk

EXCEL FOR REWARD COURSES

Our classes have been specially developed to help you master skills specific to compensation and benefits work not taught in any general Excel course. These courses are UNIQUE.

E-reward.co.uk has teamed up with WorldatWork to offer its training classes in Excel skill building in the United Kingdom. We have commissioned Dianne Auld to design, develop and deliver two classroom courses focused and tailored so that we cover all of the essential Excel skills that are relevant to the needs of UK reward professionals – offering you the opportunity to enhance your learning as you progress from our Excel Intermediate level to Excel Advanced level.

Stop panicking about how you will analyse those mountains of reward data. Guaranteed to save hours and hours – some even say days – by harnessing all the power of Excel.

TWO SUPERB EXCEL COURSES TAILOR MADE FOR REWARD PROFESSIONALS

Dianne has worked with E-reward and WorldatWork to carefully devise a study programme to assist reward professionals with their day-to-day tasks in Excel. These Excel for reward classroom courses – Intermediate and Advanced – include sleek visual and audio demonstrations of tasks reward professionals need to perform in their job function. During these demonstrations, students follow the instructions being highlighted by Dianne, and immediately afterwards undertake a parallel exercise on their own, with teacher guidance, to cement the learning.

You will enhance your ability to analyse mountains of data in seconds with professional looking charts and Pivot Tables. Unlike other Excel courses, our classes have been specially developed to help you master skills specific to compensation and benefits work not taught in any other general Excel course. **These courses are UNIQUE.**

Dianne will be visiting London once a year to lead these classroom courses. Her courses always sell out. Enrol now on our educational courses so that you can be confident about enhancing your Excel skills in the workplace. You'll have the powerful Dianne Auld training name on your CV, as a quality mark of achievement in Excel for Reward. You can also be confident that you will possess the enhanced Excel skills for reward being sought by today's employers.

YOUR TUTOR

Dianne Auld, GRP, CCP, CSCP

Dianne is without doubt the most highly regarded and popular Excel for Reward expert in the world. Well respected and distinguished in the compensation field and Excel, her skills and expertise are in high demand. Based in Cape Town, South Africa, she travels worldwide showing reward professionals how to harness all the power of Excel.

Dianne has partnered with WorldatWork to develop a wide-ranging educational programme to assist reward professionals with their day-to-day tasks in Excel. In conjunction with WorldatWork, she has developed a series of Excel learning products including: Excel Skills for Compensation Professionals; Excel Tips; Compensation Excel Dashboards; and a series of Sales Compensation Excel Dashboards. Dianne is also a faculty member at WorldatWork and a reviewer for the *WorldatWork Journal*. Since 2012, she has presented each year at the Worldatwork US Total Rewards conference.

Dianne owns a consulting practice, **Auld Compensation Consulting**, in South Africa. She consults to a wide range of organisations across Africa and the Middle East in all areas of total rewards: reward strategy, base pay management, remuneration surveys, job evaluation, broadbanding, pay structuring, incentive design and sales compensation. She has developed and taught courses in Africa, the Middle East, the Far East, Europe, and the United States.

EXCEL SKILLS FOR REWARD PROFESSIONALS: INTERMEDIATE LEVEL

two-day course

Location: London.
Duration: Two days, 9am to 5pm.
Format: Classroom course, maximum of 14 attendees.
Fees: £1,055 + VAT.
(includes postage and packaging of 150-page course book sent to you in advance of the class).

Designed for reward professionals who are using Excel on a day-to-day basis in their reward work but who want to gain a deeper understanding of the more sophisticated facilities offered in the compensation data area.

Reward professionals today require a high level of proficiency in Excel in order to effectively analyse remuneration data. They need to know how to use pivot tables, charts, advanced data and formatting techniques, lookup, if and statistical formulas. Having the required proficiency in these areas can make the difference between taking three minutes to do a job or three days. What's more, gaining this understanding can enable reward practitioners to concentrate on extracting insights from the data rather than wasting time crunching numbers. The typical reaction from delegates attending this course is – 'If only I'd known how to do this last week!'

Our hands-on practical course covers the essential Excel skills required to analyse market and organisation remuneration information. It has been created for reward, HR and payroll professionals who would like to enhance their Excel skills, and perform complex job tasks such as compiling and analysing data and performing calculations. For those who already have a good working knowledge in Excel, this course will provide you with the expertise and skills to use Excel at a higher level.

WHO SHOULD ATTEND

A good basic to intermediate understanding of Excel is required before attending the workshop. To get the most out of this course, we recommend that:

- Students are working with remuneration data in Excel on a regular basis in their work.
- Students should have good navigational skills in Excel, and be able to select, copy, move, paste, edit and sort data with ease.
- Students should be comfortable with working with large amounts of data and entering formulas.

Dianne Auld says:

'The ideal candidate for this course would already be familiar with some of the information covered on the agenda. But this course will greatly enhance their ability to analyse mountains of data in seconds with professional looking charts and Pivot Tables. Anyone with a good understanding of Excel will dramatically increase their productivity levels when working with remuneration data in Excel. This course is designed for compensation professionals who need to use Excel to perform complex job tasks such as compiling and analysing compensation data and performing calculations.'

DOCUMENTATION

A workbook is provided with detailed (click-by-click) instructions on how to carry out every function demonstrated. The workbook covers Excel 2007, 2010 and 2013. Excel files are also provided to each delegate complete with all the training and exercise spreadsheets used during the workshop. These Excel files will be emailed to you in advance of the course.

REQUIREMENTS

This course requires you bring a Windows PC laptop (not Mac) with Microsoft Excel 2007 or later (plus charger). We recommend that you bring a mouse to the course to help with extensive on-screen navigation.

TEASERS

1. Did you know that you can use Control E in Excel 2013 to separate first name and surname for the whole column at one time?

Find out other quick ways to separate columns, combine columns, and change case for the whole column at one time, using Excel 2007, 2010 or 2013, by attending this course.

2. Did you know that you can press the F11 key to create a chart?

Find out other time-saving tips for creating great looking column charts, bar charts, line charts and pie charts using Excel 2007, 2010 or 2013, by attending this course.

3. Did you know that you can use the Pivot Table Report Filter function to create one pivot table per division or manager at the click of a button?

Find out how to harness the power of pivot tables for analysing and reporting on data at this course.

4. Did you know that you can enter today's date in a worksheet by pressing Control and semi-colon or typing =TODAY()?

Find out how to master tricky dates in Excel, how to format them to sort correctly, and how to calculate age, length of service or time in job using one simple date formula at this course.

5. Did you know that you can prevent Mail Merge showing lots of decimals like this – 485.6789 – by using a simple ROUND formula in the Excel source data?

Master rounding formulas, and the most important and time-saving formulas in Excel: Vlookup and If formulas, by attending this course.As a bonus, also learn Hlookup, If(And), If(Or) and Iferror!

COURSE PROGRAMME

- Customising the Quick Access Toolbar/Importing and formatting remuneration data – including combining data from different columns, dividing data into different columns, changing case and text formulas
- Rounding numbers/Custom Formatting/Working with dates
- Valuing the total reward Package – including Vlookup, Hlookup and If formulas
- Validation/checking of remuneration data (including the Data Filter, Custom Filter and removing duplicates)
- Sub-totalling remuneration data
- Comparing/Projecting remuneration data/Applying Conditional formatting to market comparisons
- Statistics for Remuneration Data
- Graphing Remuneration Data
- Scattergrams, Trend Lines and Regression analysis
- Pivot Tables and Goal Seek

With this class you will:

- Learn skills specific to compensation work not taught in any standard Excel course.
- Save hours of work when you import, merge and format large amounts of data for analysis.
- Learn how to analyse mountains of data in seconds with professional-looking charts and PivotTables.
- Face your fear of regression analysis and easily create a pay policy line and salary predictions.
- Perform complex calculations in minutes using the SUBTOTAL function.
- Harness the power of VLOOKUP, HLOOKUP, IF, AND, OR and IFERROR functions

Learning objectives

- Customise the quick-access toolbar
- Create charts, graphs and tables from various types of data
- Use formulas to simplify complex calculations
- Check data for duplications and errors
- Calculate subtotals

EXCEL SKILLS FOR REWARD PROFESSIONALS: ADVANCED LEVEL

two-day course

Location: London.
Duration: Two days, 9am to 5pm.
Format: Classroom course, maximum of 14 attendees.
Fees: £1,055 + VAT.
(includes postage and packaging of 150-page course book sent to you in advance of the class).

Providing you with the knowledge and skills to use Excel at a highly advanced level.

Reward professionals enrolling in this two-day course should already have strong Excel skills. It is designed for students who would like to learn advanced Excel techniques, and how to apply these to create powerful interactive **Excel dashboards** for viewing and analysing reward data. Excel dashboards have enormous application in HR and compensation work. Dashboards enable the consolidation of huge amounts of remuneration data into an executive summary view. They use interactive fields to allow different views of the data and modelling of data. Dashboards can replace bulky and cumbersome reports, show management only what they want to see and allow powerful 'what-if' analyses for incentive modelling.

On the first day you'll learn advanced Excel functions, including complex Lookup and If formulas, data validation and protection, array formulas and macros to do pay and benefits calculations and pay and commissions calculations. The next day, you'll learn about data validation and protection as well as macros and put what you learned into action as you create an Excel dashboard that will illustrate how pay structures compare competitively to the market.

- Learn advanced Excel formulas to streamline your compensation tasks
- Create an interactive Excel dashboard using a real-world scenario that illustrates how pay structures compare competitively to the market
- Transform vast amounts of data and display analysis and key findings in a condensed space where it is easy to access, interact with and understand
- Learn how to gain critical information and insights from dashboards in order to make quick and effective business decisions
- Ask questions and interact with Excel for reward expert, Dianne Auld

WHO SHOULD ATTEND

An intermediate knowledge of Excel is required before attending the workshop.

- Ideally, delegates would already have attended the two-day **Intermediate-level** course or a similar course or have equivalent knowledge.
- Delegates must be comfortable using Excel formulas creating charts and pivot tables.
- Delegates should be proficient with using Vlookup and If formulas – only a brief review of these will be provided.

Dianne Auld says:

"Students enrolling in this course should already have a thorough understanding of Excel but want to study more about the advanced facilities offered in this area. I have created this two-day course to look further into Excel and help you master the more highly advanced Excel skills specific to reward work. You will learn how to use these to create powerful interactive Excel dashboards for viewing and analysing remuneration data."

DOCUMENTATION

Delegates will receive a comprehensive workbook to use as you progress through the course, including 150 pages of detailed Excel instructions, with screen shots, for all Excel functions taught in the course. Files are also provided to each delegate, complete with all the exercises and dashboards undertaken during class. These files will be emailed to you in advance of the course.

REQUIREMENTS

This course requires you bring a Windows PC laptop (not Mac) with Microsoft Excel 2007 or later (plus a charger). We recommend that you bring a mouse to the course to help with extensive on-screen navigation.

TEASERS

1. Did you know that you can write a macro which will do eight hours of Excel work in a minute?

Find out how to record, edit and work with Excel macros, to automate repetitive work and save days of time, by attending this course.

2. Did you know that you can use Goal Seek to get to a desired merit budget at the click of a button?

Find out how to use Goal Seek, Array formulas and other time-saving tips, to speed up your rewards work by attending this course.

3. Did you know that you can use the Iferror formula to eliminate all those unsightly #N/A and #DIV/0! errors in your Excel worksheets without deleting your formulas?

Master the most important and time-saving lookup, reference and If formulas in Excel: Vlookup, Hlookup, Index, Match, Choose, Offset, Indirect, If, If(And), If(Or), Iferror, Countif, Sumif and Averageif, by attending this course.

4. Did you know that you can use the camera tool to put an entire table into one cell in an Excel dashboard, and make the table interactive based on a field chosen by a user?

Find out how to design and create powerful, interactive Excel dashboards by attending this course.

5. Did you know that you can set up user controlled slicers with a pivot table or chart to slice and dice the data, and that you can link one set of slicers to all the pivot tables and charts in a dashboard?

Find out how to design and create powerful, interactive pivot chart dashboards with slicers by attending this course.

COURSE PROGRAMME

DAY 1: ADVANCED EXCEL TECHNIQUES

Lookup Formulas #1

Vlookup, Hlookup, Iferror, Columns, Match formulas and Naming Ranges

Lookup Formulas #2

Indirect, Index, Offset, Choose formulas and Inserting Form Controls – scroll bar, spin button and combo box

If formulas

If, If (And), If (Or), Nested If, Countif, Sumif, Averageifs formulas

Macros

Recording, running and editing macros, macro security settings

DAY 2: ADVANCED EXCEL TECHNIQUES CONTINUED AND CREATING EXCEL DASHBOARDS

Data Validation and Protection

- Creating forms and input documents using data validation tools
- Hiding sheets, protecting worksheets and workbooks

Array Formulas

- Single-cell and multi-cell array formulas
- Application of array formulas together with other Excel formulas
- All formulas and techniques will be demonstrated using remuneration applications

Introductory Dashboard Presentation

- What are dashboards?
- What they are used for?
- How do you create dashboards?
- Important principles, examples of dashboards

Creating an Interactive Market Comparison Dashboard

- With visual indicators, charts, tables and interactive fields allowing geographical drill downs and different market projection dates
- Learning to use the camera tool and complex conditional formatting.
- Using Match, Offset, Array, Indirect, Averageifs, Iferror, Datedif and other formulas to create this interactive and powerful dashboard

Creating an Interactive Pivot Table HR Statistics Dashboard

Using pivot tables, pivot table charts, slicers, and a heading linked to the report filter. These techniques will be used to create this visually powerful dashboard of reward statistics, allowing drill down by function, region and level.

AN INTRODUCTION TO EXECUTIVE PAY

one-day course

Location: London.
Duration: One-day, 10am to 4pm.
Format: Classroom course, maximum of 10 attendees.
Fees: £445 + VAT.

This one-day seminar offers an excellent introduction for reward and HR managers who are having to deal with pay structures and processes for their senior executive team for the first time, or who are simply interested in building their knowledge of this key area of reward management. The programme is also relevant for corporate governance professionals who want to develop their understanding of typical executive pay design.

E-reward.co.uk has teamed up with Andrew Menhennet, a Director at reward and training consultancy **Yellow Hat**, to develop a focussed one-day seminar that will offer you the perfect introduction to executive remuneration in the UK.

Delegates will learn about the principles behind sound executive pay design and governance in the UK, as well as typical market practice and the legislative context within which listed companies must operate. The day will include illustrations of executive pay in practice drawn from the E-reward executive pay database.

WHO SHOULD ATTEND

The seminar is relevant for all reward and HR managers who are new to or interested in the design and governance of executive remuneration in the UK. It will also benefit other corporate governance professionals who wish to gain a deeper understanding of typical executive pay design and structures.

YOUR TUTOR

Andrew Menhennet

Andrew is a Director at **Yellow Hat Limited**. He is a reward consultant with in-depth experience of UK and international reward practice, as both a consultant and a practitioner. Before joining Yellow Hat, Andrew held senior reward roles at HSBC, KPMG and Barclaycard, and worked as an employee benefits consultant at KPMG, and ran his own independent reward consultancy.

Andrew is co-author of the CIPD's annual *Reward Risks* survey, and has written a series of authoritative reports for E-reward.co.uk on the development of remuneration regulation in the financial services sector and on the latest developments in the governance of executive pay across the public and private sectors. He speaks at conferences on a range of reward topics and is a tutor on training programmes for reward analysts.

Recent clients include McGraw Hill Financial, Volvo Construction Equipment, Royal Bank of Scotland, CIPD, SJ Berwin Wood King & Malleson and Which Limited.

COURSE PROGRAMME

The principles of executive pay

- The role and status of executive directors
- An overview of the FRC Combined Code
- The Code's principles for the level and structure of executive pay
- The process of determining executive pay

The Remuneration Committee

- The role and composition of the remuneration committee
- Using external advisors
- Exercising judgement and discretion
- Managing the remuneration committee

The structure of executive pay

- Typical elements of the executive pay mix
- Executive pay structures in practice – examples of how different types of firm approach executive pay

Short-term incentive plan design

- The Combined Code's guidance on performance-related pay
- Typical design features
- Performance measures
- Deferral
- Malus and clawback

Long-term incentive plan design

- Typical design features
- Performance measures
- Share-based pay – design and governance considerations
- Stakeholder perspectives

Benefits

- Typical benefit plan design for executives
- Pensions – the changing legal context

Recruitment, severance and retention

- 'Golden hellos' and buyouts
- Contract length and severance payments
- Retention awards

Reporting

- An introduction to the Directors Remuneration Reporting Regulations
- The executive remuneration policy – overview and status

THE DIRECTORS REMUNERATION REPORTING REGULATIONS

one-day course

Location: London.
Duration: One-day, 10am to 4pm.
Format: Classroom course, maximum of 10 attendees.
Fees: £445 + VAT.

A step-by-step guide to how listed companies in the UK must report executive pay, this one-day seminar is an excellent introduction for reward, HR and corporate governance professionals getting to grips for the first time with the complex Directors Remuneration Reporting Regulations, as well as a refresher for more experienced professionals.

E-reward.co.uk has teamed up with Andrew Menhennet, a Director at reward and training consultancy **Yellow Hat**, to develop a focused one-day seminar that will tell you all you need to know about the new reporting regime.

You will gain a practical understanding of the scope of the legislation, what information you must provide, and in what format, based on live examples to illustrate evolving best practice. The seminar also covers the shareholder voting rules, explaining which elements of remuneration are subject to a binding vote, and which to an advisory vote, how and when the information must be submitted to shareholders, and what needs to be done when shareholders vote against a proposal.

WHO SHOULD ATTEND

The seminar has immediate relevance for all reward and HR managers and other corporate governance professionals who are involved or interested in reporting executive remuneration in UK listed companies. It will also be suitable for anyone working in other organisations where there is an expectation that executive pay reporting will adopt some or all of the practices of listed companies.

COURSE PROGRAMME

The context to the regulations

- Issues that gave rise to the recently-introduced regulations
- The thinking behind the regulations

Key elements of the implementation report

- The single total figure of remuneration
- Total pension entitlements
- Variable pay awards made during the year
- 10-year company performance graph and table of CEO pay
- Past directors and exit payments
- Statement of Directors' shareholdings
- The importance of Directors' pay compared to pay for other employees and other distributions of profit
- Details of shareholder voting on the remuneration report at the previous AGM
- Information about who has advised the remuneration committee

Key elements of the policy report

- The future policy table
- The approach to recruitment remuneration
- Service contracts
- Illustrations of what directors will get paid under the policy
- How exit payments will be calculated
- Material factors taken into account when setting executive pay policy

The shareholder voting requirements

- The binding shareholder vote on remuneration
- The advisory shareholder vote on remuneration
- How the new legislation works in practice
- The role of shareholder advisory bodies

YOUR TUTOR

Andrew Menhennet

Andrew is a Director at **Yellow Hat Limited**. He is a reward consultant with in-depth experience of UK and international reward practice, as both a consultant and a practitioner. Before joining Yellow Hat, Andrew held senior reward roles at HSBC, KPMG and Barclaycard, and worked as an employee benefits consultant at KPMG, and ran his own independent reward consultancy.

Andrew is co-author of the CIPD's annual Reward Risks survey, and has written a series of authoritative reports for E-reward.co.uk on the development of remuneration regulation in the financial services sector and on the latest developments in the governance of executive pay across the public and private sectors. He speaks at conferences on a range of reward topics and is a tutor on training programmes for reward analysts.

EXPATRIATE MANAGEMENT FOR REWARD PROFESSIONALS

two-day course

Location: London.
Duration: Two days, 9am to 5pm.
Format: Classroom course, maximum of 10 attendees.
Fees: £1,055 + VAT.

This two-day seminar will be of particular interest to organisations reviewing existing international remuneration policies and those just starting to tackle the challenges inherent in the international transfer and management of staff.

E-reward.co.uk has teamed up with **The HR Partners** to develop a focused two-day seminar that will offer you the perfect introduction to expatriate management. The basics of this programme have been developed and delivered in eight countries and updated over 15 years.

Our seminar will:

- Introduce some of the complex issues involved in determining and controlling appropriate international remuneration
- Review different approaches and examine how they may fit with different company requirements in terms of evolution and culture
- Discuss modern trends
- Provide practical information – including checklists – and advice on how to manage international remuneration, where to find the data you need to manage assignments and how to access appropriate sources of advice and guidance
- Use case studies to illustrate the complexities in the area of international remuneration and provide workable and innovative solutions to these problems.

WHO SHOULD ATTEND

The primary audience is that of human resources and reward professionals involved in employee transfers including individuals new to the area of international remuneration.

COURSE PROGRAMME

DAY 1

Principles and insights

- Are expatriates different?

Introduction to remuneration systems

- The domestic context
- Evolution of mobility management
    - Home based systems
    - Host based systems
    - Budget approach
    - Balance sheet method
    - Complex approaches
- Equalisers
- Compensators
- Motivators

DAY 2

- Benefits in kind
- Terms and conditions of employment, letters of assignment, contracts,

Ensuring continuous alignment

- Adjusting to a changing world

Who should employ the expatriate?

- Pay delivery
- Issues in international taxation

Expatriate Process management

Outcomes, solutions and conclusions

This is an interactive programme and will include a number of exercises and group case studies providing participants with the opportunity to work with their peers from other companies and industry sectors in reviewing current policy and practice.

YOUR TUTOR

John Nichols

John is a Director at **The HR Partners** and has been in reward consulting for over 30 years and has specialised in developing creative, innovative and flexible compensation systems to fit specific client requirements. He has worked on consulting assignments in 56 counties in North and South America, South Asia plus Continental Europe and, more recently, Africa. His initial experience was at ECA, one of the world's leading cost of living and expatriate information providers, and he has worked with cost of living data from all the major providers. John has also established and operated an independent consultancy and has worked at Director level.

Principal tasks have included the design, development, implementation and review of expatriate compensation programmes. Projects have included:

- M&A assignments, from due diligence through to integration and roll out of compensation structures.
- Conducting bespoke local national pay data surveys (including 12 African countries) as well as industry specific international salary surveys.

Additionally, John has run reward management and expatriate reward training courses in eight countries to both in-house staff and open multi-company, multi-country participants.

MERGERS & ACQUISITIONS FOR REWARD PROFESSIONALS

two-day course

Location: London.
Duration: Two days, 9am to 5pm.
Format: Classroom course, maximum of 10 attendees.
Fees: £1,055 + VAT.

A two-day day workshop for reward and HR professionals who will take part in pre-acquisition or post-acquisition activity and related corporate transactions including divestitures.

The first day focuses on the role of reward and HR in mergers and acquisitions and a review of the activities. Day 2 offers a deeper focus on due diligence and integration planning.

E-reward.co.uk has teamed up with **The HR Partners** to develop a focused two-day seminar that is designed to provide hands-on opportunities for a due diligence case study. The workshops will be delivered by seasoned practitioners, not trainers, and is designed to allow participants to:

- Better understand the acquisition process and the role that HR plays
- Be alert to critical success factors, and potential pitfalls
- Be familiar with the due diligence process and its contribution to post-deal planning
- Identify the remuneration and benefit issues that could have significant financial impact
- Understand the key issues in integration and be prepared to undertake the process
- Be able to support a divestiture from an HR perspective

WHO SHOULD ATTEND

This course is designed for HR professionals – especially those with remuneration and benefits responsibilities – who may be called upon to support their employers' M&A activities including acquisitions, mergers and divestitures.

YOUR TUTOR

Leslie Moss

Leslie is Director at **The HR Partners**. He is a senior HR consultant with more than 30 years' experience covering both leading global practices and smaller firms. He has a broad background in HR consulting, including:

- Broad-based and executive pay, especially reward design and incentive/stock plans
- Performance management, including competencies, banding and grading
- HR strategy and processes
- Corporate transactions including IPOs, mergers and acquisitions

Leslie has worked with market-leading global organisations supporting their acquisitions. Major M&A projects have included supporting Virgin Money's acquisition of Northern Rock, Shell's sale of their Stanlow refinery, Sabre's acquisition of lastminute.com and IBM's printer joint venture with Ricoh.

Up to September 2013 he was Practice Leader, Human Capital Consulting: UK and Ireland for Aon Hewitt, with a particular focus on corporate transactions. Prior to that he led the executive remuneration practice for Hewitt Associates. His career also includes 11 years as Director of Human Resource Partnership (a UK and Bahrain-based HR consulting and recruitment business) and seven years with Towers Watson as a trainee actuary.

Leslie is a regular speaker on HR issues. He is author of *The Employee Schemes Handbook*, the *CIPD Guide to Employees' Share Plans* and the *Pensions Management Institute* compensation and benefits teaching module. He has a Masters in Mathematics and Computer Science from Cambridge University and a first-class honours degree in Physics from the Open University. He is an Honorary Fellow of Cancer Research UK. In 2012, Leslie was honoured with an MBE for community service.

COURSE PROGRAMME

DAY 1: TRANSACTIONS AND DUE DILIGENCE

Introduction

- Overview of the course
- Introduction of participants and workshop leaders

General overview of Mergers & Acquisitions

- Why acquire, and the different forms of deal
- Overall process and timeline
- Role of HR and its timeline
- Sales and Purchase Agreement (SPA), Employee Matters Agreement (EMA) and Transition Services Agreement (TSA)
- Synergies and pricing model

Acquired Rights Directive (EU) and similar issues applicable elsewhere

- Asset deals
- TUPE transfers
- Outsourcing
- Implications for due diligence

Due diligence

- What is it and why do it?
- How datarooms work
- What are we looking for?
- Impact on pricing models
- Implications for integration
- Access to target
- Reporting back (side-by-side analyses)

Due diligence exercise

- Breakout into teams
- Scenario background
- Teams review dataroom material, develop preliminary findings, prepare questions for missing data
- Debrief from teams

Divestitures

- When to make the decision to divest?
- Planning a divestiture
- Human resource aspects
- Communication and implementation

Key learnings and wrap-up

DAY 2: DEEPER-DIVE

Review of Day 1

The negotiating process

- Feeding into the Programme Management Office (PMO)
- Analysing due diligence findings
- Making decisions
- Role of the various professionals

Integration planning

- Integration options
- Post-merger planning and first 100 days
- Complying with an Employee Matters Agreement
- Retention

Due diligence: Pensions

- Liabilities and accounting costs
- TUPE
- Early retirement and Beckmann/Martin liabilities

Due diligence: Deferred incentives and retention

- Stock options and restricted shares on change of control
- All-employee plans and cash plans on change of control
- Implications of early cash-out

Due diligence: Other reward programmes

- Remuneration and other compensation programmes
- Bonus and other incentive plans
- Health-related benefits
- Other employment conditions
- Other benefit plans, obligations and liabilities
- Benefits replication and flex

Further due diligence exercise

- Issues arising from due diligence

Key learnings and wrap-up

- Reporting back (side-by-side analyses)

REWARD MANAGEMENT: INTERMEDIATE LEVEL

two-day course

Location: London.
Duration: Two days, 9am to 5pm.
Format: Classroom course, maximum of 10 attendees.
Fees: £1,055 + VAT.

'Reward is the single strongest communicator of how much an organisation values the contribution of an individual or group.'

E-reward.co.uk has teamed up with **The HR Partners** to develop a focused two-day seminar that will offer you an insight into current reward management: from defining how reward should relate to business objectives and the business plan through to the delivery of competitive compensation in a modern context. The basics of this programme have been developed and delivered in eight countries and updated over 15 years.

Our seminar builds through a series of steps from job evaluation and grading structures, salary scales, determining the components of reward, to appraising and rewarding performance. Participants will use market data and learn how to assess their own organisation's competitiveness.

WHO SHOULD ATTEND

This seminar is designed for reward and HR practitioners who already have a good knowledge and expertise but who wish to have further training to enhance their skills and increase their operational effectiveness.

COURSE PROGRAMME

DAY 1

Linking business objectives and reward policy and practice

Remuneration strategy

Salary policy

Processes

- Job measurement
- Salary structures
- Internal equity
- Maintenance/salary planning and budgeting
- External competitiveness
- Cost/tax effectiveness

Executive compensation

Equity

Governance

- Conducting and interpreting a gender pay audit

DAY 2

Components of reward

- Base salary and its constituent parts
- Cash allowances and guaranteed payments
- Variable pay
- Short-term bonus/incentive
- Long-term incentives
- Non-cash compensation – benefit plans
- International context

Appraising and rewarding performance

- Linking talent management and reward

The use of market data

- How to assess your own organisation's competitiveness.
- HR metrics and 'Big Data'

Communications

- Total reward statements

The role of HR

YOUR TUTOR

John Nichols

John is a Director at **The HR Partners** and has been in reward consulting for over 30 years and has specialised in developing creative, innovative and flexible compensation systems to fit specific client requirements. He has worked on consulting assignments in 56 counties in North and South America, South Asia plus Continental Europe and, more recently, Africa. His initial experience was at ECA, one of the world's leading cost of living and expatriate information providers, and he has worked with cost of living data from all the major providers. John has also established and operated an independent consultancy and has worked at Director level.

Principal tasks have included the design, development, implementation and review of expatriate compensation programmes. Projects have included:

- M&A assignments, from due diligence through to integration and roll out of compensation structures.
- Conducting bespoke local national pay data surveys (including 12 African countries) as well as industry specific international salary surveys.

Additionally, John has run reward management and expatriate reward training courses in eight countries to both in-house staff and open multi-company, multi-country participants.

ELEMENTS OF SALES COMPENSATION

two-day course

Location: London.
Duration: Two days, 9am to 5pm.
Format: Classroom course, maximum of 10 attendees.
Fees: £1,0.55 + VAT.

Take an in-depth look at sales compensation. This two-day class in partnership with *Worldatwork* presents the fundamentals for the design and implementation of sales compensation plans tailored to a company's business strategy.

Emphasis is placed on the special terminology and issues that make sales compensation unique from other incentive plans. Participants are presented with several design options and related information in order to assess which sales compensation approaches may be appropriate for a given company. Participants are also introduced to critical implementation factors including financial modelling of the proposed plan, employee communication and plan assessment over time.

- Discuss sales compensation rationale, value and uniqueness.
- Identify the key influences to all sales compensation plans.
- Discover the six key components of a basic sales incentive.
- Find out how to introduce a new or revised incentive plan to the sales force.
- Review why sales incentive plans fail and ways to determine if your plan is working properly.

WHO SHOULD ATTEND

The course is designed for compensation and sales administration personnel relatively new to the sales compensation field and who are involved in designing, implementing and administering sales compensation plans.

COURSE PROGRAMME

Sales compensation terms and definitions

- The total rewards model
- The purposes of sales compensation
- Uniqueness of sales compensation
- Key sales compensation terms
- Incentive payment methods

Influences on sales compensation design

- Drivers of sales compensation design
- Go-to-market strategy
- Sales channels
- Direct sales channel
- Indirect sales channel

Design components

- Eligibility
- Target cash compensation
- Pay mix
- Calculation methods
- Performance measures
- Performance and payout arrangements

Plan refinement and testing

- Calculating formulas
- Quotas
- Testing through financial modelling
- Special considerations

Plan implementation

- Plan terms and conditions
- Plan qualifiers
- Employee administration
- Integration with other programmes
- Handling plan changes
- Employee communications
- Tracking and payment administration

Assessing plan effectiveness

- Plan evaluation
- Failing plans
- Assessing the plan
- Sample analysis

YOUR TUTOR

Alan Gibbons

Alan is Managing Director of **The Reward Practice** and is one of Europe's best-known rewards professionals. He had been a Rewards Consulting Partner with both KPMG and PwC, and was also the Global Heads of Reward and Performance Management at Accenture until founding the Reward Practice with a number of former colleagues.

Over the last 25 years, Alan has worked with a large number of Fortune 500 and FTSE 100 companies and has specific rewards experience in banking, retail, brewing, manufacturing, communications and hi-tech companies. He has helped a range of companies with mergers and acquisitions, and has a reputation for getting things done. In the public sector, he has worked extensively in the health service, the police and prison services, and in the education sector. His interests are varied, and currently include the design of more effective incentives, the reduction in HR costs, value-based rewards programmes and the link between risk and rewards in banking.