Strategic HR Change Management in the Banking Sector Course

23 – 27 November 2026
Madrid (Spain)

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Strategic HR Change Management in the Banking Sector Course

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Strategic HR Change Management in the Banking Sector Course is a one-week course for HR teams and department heads in banks who must turn the bank's strategic plan into workforce, hiring, reward and succession decisions. It works through branch restructuring, digital channels and role redesign as they affect people. You build a Bank HR Transformation Plan for your own institution. Mercury Training Center runs this course for banking HR.

About This Course

Banks reshape branch networks, move customers to digital channels and tighten cost targets, yet HR often learns of the plan after the decisions are made. To follow the course you should already work in or with a bank's HR function. You practice on banking cases, workforce data and HR cost figures, one decision at a time.

Who It Is For

- People who lead a bank's HR function and sit in its planning discussions
- People who run recruitment, learning or reward for branches and head office
- People who head business departments and own headcount and restructuring decisions
- People who plan the bank's workforce and succession for critical roles
- People who analyze HR costs and report results to the executive committee

This course is not for readers new to HR, who are better served by a foundation course in HR practice, or for HR staff outside financial services, who are better served by a cross-sector HR transformation course.

Competencies You Will Build

- Plan-to-people translation: turns the bank's strategic goals into HR action plans with owners.
- Workforce shaping: sizes branch and head office teams and sets sensible spans of control.
- Talent acquisition design: selects bank staff with testing, profiling and behavioral interviews.
- Reward differentiation: links pay and bonus to measured contribution.
- Succession coverage: keeps critical bank roles covered through targeted plans and PDPs.
- HR return measurement: shows the cost and return of HR initiatives to the executive committee.

What You Will Be Able to Do

By the end of the course you will be able to:

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- From the bank's strategic plan, derive an HR action plan for a branch or business line.
- Given headcount and transaction trends, project staffing needs for a restructured branch network.
- Using a training efficiency model, rank learning requests by expected return and cut low-value spend.
- Given appraisal and competency data, decide who enters targeted succession for critical roles.
- From a slow HR workflow, redesign the steps with business process reengineering.
- Using the HR ROI formula, calculate the return of a hiring or training initiative.

Course Content

Day 1: HR in the Bank's Strategy Cycle

- Linking HR Plans to the Bank's Strategic Planning Cycle
- Ten-Input Checklist for a Bank HR Strategy
- Strategic Action Plans for Branches and Head Office
- Matrix Reporting Lines and Measuring HR Results
- Creative Options and Ten No-Cost Improvement Areas for Bank HR

Day 2: Reshaping the Bank Workforce

- Structure and Shape of the HR Function in a Changing Bank
- Added-Value Test for HR Activities
- Workforce Planning and Projection for Branch Networks
- Right-Sizing, Downsizing and Restructuring Choices
- Span-of-Control Ratios for Supervisors and Managers

Day 3: Hiring, Learning and Reward in Banking

- Recruitment Redesign With Testing and Profiling
- Behavioral Interviewing in Practice for Bank Roles
- Training Efficiency Model, Evaluation and Budget Prioritization
- Pay Differentiation and Bonus Schemes
- Talent Model for Valuing Critical Bank Roles

Day 4: Contribution, Competence and Succession

- Organizational Standards and Contribution-Based Pay
- Predictive Workforce Forecasting
- Competency Structures and Realistic Measurement
- Appraisal Cost Review, Improvement and Supporting Software
- Five Succession Plans, PDPs and Three Approaches to Targeted Succession

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Day 5: Bank HR Transformation Practice

- Exercise: Business Process Reengineering of an HR Workflow
- Exercise: HR ROI Formula Applied to a Hiring Initiative
- Exercise: Workforce Projection for a Branch Network Restructuring
- Exercise: Prioritizing HR Activities With the Two-Stage HR Model
- Completing Your Bank HR Transformation Plan

Case Studies and Exercises

The following are suggested activities.

- Case study: A retail bank closes branches as customers move to mobile channels; you decide how to redeploy, retrain or release staff.
- Case study: A corporate bank faces retirements in credit risk roles; you produce a targeted succession plan.
- Exercise: An insurance company's onboarding takes too many steps; you produce a reengineered HR workflow.
- Exercise: A payments firm wants to justify a sales training budget; you produce an HR ROI calculation.

What You Take Back

The Bank HR Transformation Plan is a working document you build across the one week around your own bank's goals. In your first month back, use it to brief the executive committee on HR actions behind the strategic plan and to start the first workforce or succession review.

- An HR action plan linked to the bank's strategic goals
- A workforce projection and restructuring options
- A succession map for critical roles
- An HR ROI case for the first initiative

Quick Answers FAQ

What should I know before a strategic HR change management course for banks?

You should already work in or with a bank's HR function or manage a team inside a bank. Familiarity with your bank's structure and planning cycle helps; no finance background is required.

How does banking sector HR change management differ from a general HR change course?

The banking course ties every HR decision to a bank's strategic planning cycle, branch networks, digital channels and critical roles such as credit and risk. A general HR change course uses cross-sector examples, which suits readers outside financial services.

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What role does HR play in bank restructuring?

HR projects staffing needs, designs the new structure and spans, handles redeployment and release fairly, and protects critical roles through succession. Its input is most useful before branch or business line decisions are made.

What do I take back from a strategic HR change management course for banks?

You take back the Bank HR Transformation Plan, built on your own bank's goals. It holds an HR action plan, a workforce projection, a succession map and an HR ROI case.

For Your Manager

After the course, the team member will be able to link HR actions to the bank's strategic plan, project staffing for restructuring, redesign hiring, learning and reward, and measure HR returns. They return with a Bank HR Transformation Plan, first used to brief the executive committee and launch the next workforce or succession review.

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