

# CASE STUDY

## Delivering a Seamless People Integration at Scale



### Client Context

- Merger of 3K employees - one Bank to another
- Harmonisation of Terms & Conditions (T&Cs)
- individual T&C sign-off required (no TUPE)
- Differences - legacy and acquiring packages
- Retention of skills critical to service continuity

### The Challenge

- Achieve high acceptance of new T&Cs
- Avoid ER issues or disputes
- Manage impact of less favourable changes
- Maintain morale and trust
- Deliver alongside wider operational change

### Our Journey Enabled

- Early identification of people impacts & gaps
- Clear, structured people change plan
- Simple, transparent communication
- Real-time visibility of risks and engagement
- Practical guidance for leaders during change

### Benefits for People

- Clear understanding of change and impact
- Time and support to make informed decisions
- Improved wellbeing via open communication
- Smooth transition into new roles and teams
- Access to representation post-transfer

### Benefits for Business

- High T&Cs acceptance - minimal disruption
- No significant ER or union issues
- Retention of key skills and capability
- Maintained productivity through transition
- Reduced reactive management time

### Critical Success Factors

- People-first approach from the start
- Clear and consistent communication
- Visible, accountable leadership
- Time allowed for employee decisions
- Structured, insight-led delivery

## Conservative (hard) savings: £2.25M to £4.85M

A people-first T&Cs harmonisation for 3,000 employees—enabled by ‘Our Journey’—drove high acceptance, protected skills and service, avoided disruption and ER risk, and delivered £2m–£5m in value through reduced attrition, disengagement and inefficiency.

**Disengagement and Disruption Reduced**  
(productivity protection)

£0.9M to £1.9M

**Attrition Avoided**

£1M to £2.1M

**ER Risk Avoided**

£0.05M to £0.15M

**Programme Efficiency**

£0.3M to £0.7M

**Total Value\***

£2.25M to £4.85M