Outplacement Services for Financial Services Organizations

Protect your brand, support impacted employees, and reduce risk during restructures across banking, insurance, and investment functions.

Who We Serve

- Retail and Commercial Banking
- Credit Unions
- Insurance and Insurance Brokerage
- Asset and Wealth Management
- Capital Markets and Investment Banking
- Private Equity and Venture Capital
- Fintech and Financial Operations Teams

The Financials Workforce Reality

Financial services reductions are uniquely sensitive. Employees often manage client relationships, regulated activities, confidential information, and brand reputation risks. Leaders need an outplacement partner who can move fast, communicate clearly, and support employees through a competitive market while maintaining a compliance-aware, discretion-forward approach.

Key Pain Points:

- Regulated roles require careful messaging and documentation discipline
- Client and book-of-business transitions can complicate separations
- Background checks, licensing considerations, and compliance obligations extend beyond day one
- Reputation and confidentiality are critical, especially in local markets

What We Deliver

Speed and stability

- Launch support in 24 to 48 hours
- HR and manager communication toolkit for regulated environments
- Clear enrollment workflow for large and small impacted populations

High-touch support for people

- 1:1 coaching with role-specific job search plans
- Resume, LinkedIn, and interview preparation tailored to financial roles
- Networking strategy and recruiter outreach cadence built into the plan

Visibility for HR & Leadership

- Participation dashboard and weekly status reporting
- Theme tracking: common barriers, progress milestones, reemployment signals
- Escalation path for sensitive cases, executives, and high-risk employee concerns

Financials Role Coverage Grid

Banking and lending

- Branch and regional leadership, underwriting, credit, treasury support, risk

Insurance

- Claims, underwriting, actuarial support, customer operations, brokerage roles

Investments and markets

- Capital markets support, investment research, portfolio and product support, operations

Corporate functions

- Finance, FP&A, accounting, audit, compliance, HR, procurement, data and analytics

Technology and risk

- Cybersecurity, IT, data governance, operational risk, model risk, program management

What HR Gets

- Launch plan, kickoff scripts, and employee orientation deck outline
- HR FAQ template tailored for regulated workforces
- Weekly reporting template and participant progress summary
- Escalation path for sensitive departures and executive situations
- Optional add-on: manager enablement coaching for separation conversations

Program Design

Core (Staff)

- Orientation and career assessment
- Resume and LinkedIn refresh
- Interview prep and job search plan
- Weekly accountability and momentum coaching

Professional (Manager And SPECIALIST)

- Everything in Core
- Target role strategy: titles, segments, and market positioning
- Networking strategy with outreach scripts and recruiter approach
- Offer and negotiation support

Executive (Directors, VP, C-SUITE)

- Everything in Professional
- Executive narrative, board bio, and leadership branding
- Targeted market outreach plan and stakeholder messaging
- Thought leadership support for credibility-building

Financials Specific Modules

Compliance-aware job search support

- Messaging discipline for regulated environments and sensitive separations
- Guidance on what to share, when, and how during active searches

Confidentiality and reputation protection

- Discretion-forward LinkedIn strategy and narrative control
- Employer brand considerations and careful positioning in the market

Role family playbooks

- Banking and lending pathways, insurance operations, capital markets support, corporate finance and accounting, risk and compliance
- "What hiring managers look for" checklists by function

Client transition sensitivity

- Guidance for employees managing client relationships, service continuity, and professional reputation in transition

Compensation and leveling strategy

- Market-ready positioning for base, bonus, commission, and incentive-heavy roles
- Negotiation approach specific to financial compensation structures

Ready To Protect Customer Experience While Supporting Your People Through Change?

Visit: www.Relevante.com
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How We Run It

- **Day 1 to 2:** HR kickoff, program setup, communication toolkit
- **Week 1:** Orientation, intake, assessment, first coaching session
- **Weeks 2 to 4:** Branding, targeting, networking activation, interview preparation
- **Weeks 4+:** Interview cycles, offer evaluation, negotiation support
- **Ongoing:** Weekly employer reporting, escalations, outcomes tracking

Outcomes And Reporting

Sample metrics to show:

- Enrollment and engagement rate
- Milestone tracking: branding complete, outreach launched, interviews secured
- Time to first interview activity
- Offer activity and role alignment quality signals (when available)
- Theme tracking: common barriers by job family (risk vs finance vs operations)