

# Employee Offboarding



## About this automation:

Use this process to create tasks and documents required for offboarding an employee.



Simply import the sample automation, customise to suit your practice, test and activate!

Employee Name: «EmployeeName»  
 Position: «Custom\_Employee\_Role»  
 Date of interview: «CreatedDate»

What are the reasons for leaving?

Select one or more:

Higher pay       Better benefits       Better career opportunity  
 Improved work life balance       Career change       Closer to home  
 Conflict with other       Conflict with managers       Family and/or personal  
 Company instability       Other

• Comments

Please rank the following:

**The Job itself**

	Strongly Disagree	Disagree	Agree	Strongly Agree
Job was challenging	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
There were sufficient opportunities for advancement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Workload was manageable	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sufficient resources and staff were available	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Your colleagues listened and appreciated your suggestions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Your skills were effectively used	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
You had access to adequate training and development programs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

• What do you think can be improved about the job?

## What's included:

- ✓ Exit Interview Document & Email Templates
- ✓ Automation Process Steps

**FYI: Offboarding an Employee**

Make sure no steps are missed when an employee leaves your practice.

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Knowledge				
Templates    Directors Files & Papers    Knowledge Base    Policies & Procedures    Task Templates				
Type	Template Name	Name	Modified by	Modified
<input type="checkbox"/>	FYI: Offboarding Next Steps	FYI: Offboarding ...	Cathy Woods	09 Feb 20...
<input type="checkbox"/>	FYI: Exit Interview	FYI: Exit Interview	Cathy Woods	09 Feb 20...

  

#1	FYI Actions	<b>Create Task</b> <ul style="list-style-type: none"> <li>A task will be created with the subject "Ensure Formal Resignation Letter Received"</li> </ul> <p>Notes</p> <p>Consider updating the assignee to the appropriate User or User Role</p>	
#2	FYI Actions	<b>Create Word</b> <ul style="list-style-type: none"> <li>A Word document will be created from the "FYI: Exit Interview" template</li> <li>The document will be filed as "[FYI: Exit Interview]" in the Employees cabinet</li> <li>A task will be created with the subject "Complete Exit Interview Document"</li> </ul> <p>Notes</p> <p>Consider updating the assignee to the appropriate User or User Role</p>	
#3	FYI Actions	<b>Create Meeting</b> <ul style="list-style-type: none"> <li>A meeting will be created</li> <li>The document will be filed as "[Trigger[EmployeeName]] Exit Interview" in the Employees cabinet</li> <li>A task will be created with the subject "Setup exit interview for employee"</li> </ul> <p>Notes</p> <p>Consider updating the assignee to the appropriate User or User Role</p>	
#4	FYI Actions	<b>Create Email</b> <ul style="list-style-type: none"> <li>An Email will be created from the "FYI: Offboarding Next Steps" template                             <ul style="list-style-type: none"> <li>Created email will be <b>immediately sent</b></li> <li>Attachments will be Shared via Collaborate</li> </ul> </li> <li>The document will be filed as "FYI: Offboarding Next Steps" in the Employees cabinet</li> </ul> <p>Notes</p> <p>Consider updating the sender of the email and task assignee to the appropriate User or User Role</p>	