

Employee Offboarding Process Automation



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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You had access to adequate training and development programs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Knowledge

Templates Directors Files & Papers Knowledge Base Policies & Procedures Task Templates

Active Search templates

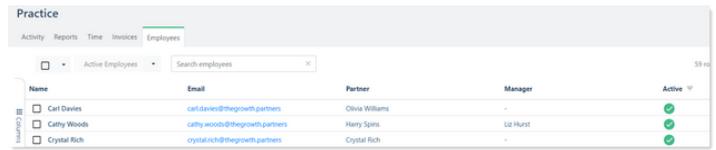
Type	Template Name	Name	Modified by	Modified
<input type="checkbox"/>	<input checked="" type="checkbox"/> FYI: Offboarding Next Steps	FYI: Offboarding ...	Cathy Woods	09 Feb 20...
<input type="checkbox"/>	<input checked="" type="checkbox"/> FYI: Exit Interview	FYI: Exit Interview	Cathy Woods	09 Feb 20...

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

How to import:

Before you begin - ensure your Employee View has been saved.

- Employee Status = Active



Step 1 - Save the import file locally

The first step is to download the zip file provided in FYI's help centre.

Simply save the file locally, for example, in your Windows Explorer Downloads folder. You do not need to extract the files.



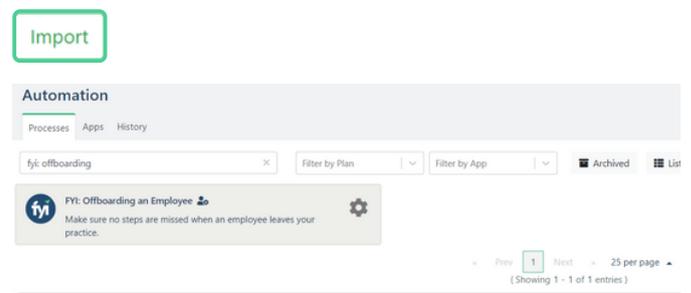
Step 2 - Import the files into FYI

Navigate to the Automations screen and click the Import button on the right-hand side of the screen.

Locate and select your saved "Offboarding an Employee" file and click Open to import the automation.

You can also drag and drop the zip file to the Automation list view.

The Process and Templates will be imported into FYI.



Step 3 - Review the process

Review the Templates

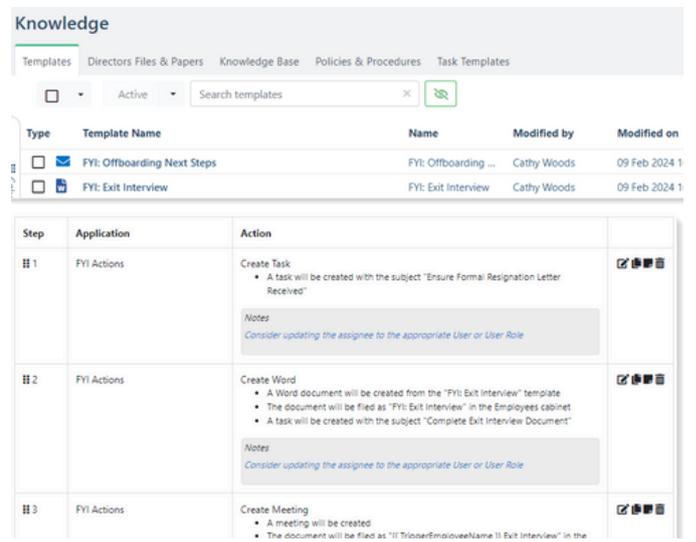
Locate the templates in Knowledge - Templates. The templates will import with the prefix FYI making them easy to locate.

- Review and personalise the imported templates
- Update the template Status to Active.

Edit and Review Each Process Step

The Custom Process is imported with the Status set to Draft. You can locate the process by searching in the "Search processes" field.

- Review the schedule and owner
- Review and update each process step. Specific comments have been added to the steps where action is required. These will display in blue.



Step 4 - Test and run the automation

Click the Test button to display a list of Employees.

From Select Test Employee, search and select a specific employee to run the test for and select Run Test. A Test Employee is handy for testing scheduled automations.

Review the test by clicking the View History link, or from the Employee workspace.

When ready, set the Status to Active. The process will run automatically according to the schedule.

