

12 Key Steps for Creating a First Class Staff Exit Feedback Process



1. **Project Champion** - Appoint an exit process project champion.
2. **Exec Buy-in** - Attain executive management agreement and desire to capture exit data and act on results. Cost of Staff Turnover tools such as <https://bonus.ly/cost-of-employee-turnover-calculator> can be quite useful for this.
3. **Establish KPIs** – for example:
 - a. Reduce staff churn from 20% p/a to less than 17% p/a within 12 months of program launch.
 - b. Achieve 65%+ participation from all exiting staff.
 - c. Ensure invites go out within 7 days of the employee's departure at least 70% of time.
 - d. Distribute high-level results to the exec team, including data trend lines for key metrics at least twice annually.
4. **Agree execution format & process.** – Decisions to be made include:
 - a. Decide format - online only feedback, phone feedback, face-to-face, paper forms for remote workers, etc.
 - b. **Pro Tip** - if taking the online route - ask for private emails from all new starters.
 - c. Decide on preloaded data fields – e.g. state, gender, department, 'undesired departure' etc.
 - d. Decide on approach to respondent anonymity.
 - e. Decide on survey and reporting software used.
 - f. Decide on manager and/or HR involvement in providing feedback about each departing employee.
 - g. Decide on process for HR to be notified of employee departure (name, date).
 - **Tip:** Payroll needs to find out every time someone leaves (otherwise departing staff would continue to be paid!) – so make sure you're in that loop.
5. **Develop Content & Communications**
 - a. Agree questionnaire, invite copy, reminder copy, pre-loaded data.
 - b. Proof and sign off.
 - c. Consider any pre-launch communications that need to be sent to Management about the new initiative / benefits thereof.
 - d. Step back and ask yourself – will this data give me what I need to help reduce staff churn and make better, more informed business decisions?



6. **Build & Trial** - set up a trial run. Check for flow. Check your invites are being received. Check your reports – are they giving you what you need?
7. **Appoint Invite Co-ordinators**. Agree invite frequency. E.g. ensure invites go out +/- 7 days of the employee's departure at least 75% of time. Invite tips:
 - a. Ensure you clearly explain who will see the feedback, and how it will be used, whether it is anonymous.
 - b. Look for opportunities to pre-load data. E.g. The survey form can often be pre-coded with the employee's name, their division, their Manager's name, and their location so that HR can easily report and filter results by this information.
8. **Launch / Invite** – put the process in action and conduct your first exit survey.
9. **Remind** – Allow each departing staff member 2 weeks to respond. Send an automated reminder message after 7 days if no response received.
10. **Monitor & Notify:**
 - a. As soon as the survey has been completed, HR should be notified by e-mail. Central person scans feedback to ensure there are no 'red flag' issues that require immediate attention.
 - b. Phone (Optional) - HR may decide to offer the employee an option whereby they are phoned if any matters raised in their feedback survey require further investigation or explanation.
 - c. Should be receiving at least 40-50% response rate or could point to something that needs fine tuning in your process.
11. **Measure Results / Actionable Reports** – run your reports. You should ideally have access to real time data. Run date-defined reports to review cumulative results, spot trends, and measure the change in ratings over time for the whole company, or broken down by department or location. Decide what's relevant. Distribute to your exec team. Make recommendations regarding corrective actions / new initiatives to reduce staff churn.
12. **Act & Communicate** – Consider quarterly or 6 monthly high-level monitor reports. Also produce a more detailed annual action plan. Address key areas of weakness and execute new initiatives. Focus on no more than two key initiatives per 6 month period as a direct result of your exit feedback. Assign responsibilities and timeframes.

- - Review performance against KPIs & Recalibrate where required - -

