

SharePoint powered Employee Exit Management system : Effective and Effortless



Overview

Employee Exit Management system

A complicated employee exit management process begins with the submission of resignation. Issuing standard letters, initiating exit processes, getting approvals, proper documentation and tracking, all can be automated with an effective employee exit management system built on SharePoint. Streamline the employee offboarding process by automating workflows, enhancing data security, and improving approval tracking through Microsoft SharePoint integration.

Client

Our client, a Fortune 500 company, is a leader in medical innovation. They develop solutions that improve lives, providing essential products, tools, and services to healthcare professionals, patients, and career seekers. Committed to growth and forward-thinking, they leverage advanced technologies to benefit employees and consumers alike.



Requirement

The client needed to enhance their manual offboarding process, which involved multiple forms and approvals, by implementing an automated, centralized system. This system required efficient tracking, data security, and streamlined workflows to ensure a smoother, faster exit process for employees while providing valuable insights for the organization.

Challenges

The client sought to enhance their employee offboarding process, originally manual and cumbersome with multiple stages and forms, resulting in significant delays and poor tracking capabilities. Lack of an automated and centralized Employee Exit Management System posed the following challenges:

- Errors**

In a digital age and time, traditional employee offboarding processes are inefficient and inadequate. Manual tracking, even on excel sheet-based tracking is error-prone, and suffers huge overhead costs. This inevitably led to delayed approvals, duplication, and repeated process inefficiencies.
- Complexity of Multiple Forms**

Once resignation is submitted, employees navigate through various forms and documents. This complexity often caused confusion and incomplete submissions. The lack of a single source of truth meant tracking of all required documents a hassle.
- Limited Insights and Analytics**

Due to insufficient insights into exit reasons and process improvements, data gathering on offboarding metrics was inefficient.
- Communication Inefficiencies**

The lack of automated notifications and reminders meant missed communication or communication gaps. Keeping all parties informed on updated status of tasks, knowledge transfer progress, and tracking if all was on schedule was a challenge.

■ **Slow approval processes**

Lack of automated workflows, and approval requests submission meant a resource, or a team of resources had to rigorously follow up approvals, resulting in wasted manhours on repeated tasks. Time-consuming, labour-intensive tracking and follow-ups for approvals caused significant delays in processing offboarding requests.

■ **Security and Compliance Risks**

Manual processes come with risks to data security. Manual systems could be easily compromised. Conforming compliance with regulations and company policies was challenging. Noncompliance leads to costly lawsuits, reputational damage, huge turnover and much more completely avoidable consequences.

■ **Lack of Centralized Data Management**

Without a single repository for all documents, and reports for employee exit management process, critical information was scattered across various systems, maintained and tracked in different excel sheets, and in various platforms. This caused difficulty in tracking and managing offboarding tasks.

Solution

By leveraging SharePoint capabilities, we developed a robust solution to automate the employee exit process, significantly enhancing efficiency and transparency for both employees and the HR department.

■ **Developed a SharePoint-based portal for automated employee offboarding.**

■ **Integrated automated email alerts and reminders to eliminate delays.**

■ **Enhanced data security and compliance through SharePoint's features.**

■ **Centralized repository**

Using SharePoint, we developed a centralized portal that simplifies process tracking for employees and HR departments. By recording the entire workflow in a central repository, employees can easily monitor the status of their exit approvals. This system enables HR to promptly identify pending approvals and expedite the process as needed.

■ **Automated email alerts and reminders**

To eliminate process delays, we integrated automated email alerts and reminders within SharePoint. These notifications ensure that authorized personnel are promptly notified of pending tasks, preventing bottlenecks and facilitating a smoother offboarding process.

■ **Implemented a centralized repository for streamlined process tracking.**

■ **Provided comprehensive dashboards for exit analytics and insights.**

■ **Customised form creation**

Capability to create custom forms as per company needs. Forms like exit form, resignation forms, other regulatory authorities form like state-required forms and notices, health insurance continuation forms, any written documentation or form to ensure that all final pay laws are adhered to and return of company property is achieved.

■ **Comprehensive dashboards and exit analysis**

Our solution includes robust exit analytics and dashboards powered by SharePoint. These tools provide valuable insights into exit reasons, employee attrition trends, average tenure, and departments experiencing high turnover rates

Asset protection and compliance management

SharePoint's security protocols and customizable workflows ensure compliance with internal policies and regulatory requirements, reducing risks associated with data breaches and unauthorized access.

Results

Following the implementation of our SharePoint-based employee offboarding system, our client realized significant positive outcomes:

- Automation replaced the paper-based system, enabling effortless tracking of approval statuses by employees and HR departments, expediting approval workflows, and ensuring smooth employee exit.
- Robust security features ensured the integrity and reliability of corporate data throughout the offboarding process.
- Our specialized tools facilitated seamless knowledge transfer among stakeholders, closing knowledge gaps and ensuring continuity.
- By leveraging email alerts and notification capabilities, we streamlined the entire offboarding process, reducing delays and enhancing efficiency.
- The SharePoint based employee exit management system served as a central system for all documents, status update, reports, etc. Related to employee offboarding process. Employees experienced a smooth offboarding journey through streamlined procedures within the centralized system.

The screenshot displays the 'E_Exit Tool' web application interface. The header includes the Boston Scientific logo, 'ExitProcess' status, and 'EDIT LINKS'. A search bar is located in the top right corner. The left sidebar contains navigation options: 'Employee Exit Process', 'Request Status', 'My Approvals', 'Admin Dashboard', and 'Completed'. The main content area is a form with the following fields:

- Employee Name*
- Designation / Local Title*
- Function* (Select Function)
- Date Of Resignation*
- Reporting Manager* (Abdul Haleem)
- Address for any future communication*
- Mobile No for any future communication*
- HRBP Name* (Select HRBP Name)
- Employee ID*
- Entity Name* (Select Entity Name)
- DOJ*
- Last Working Date*
- Location*
- Personal Email ID* (Enter you Email)
- Alternate Contact No
- Attachment (Choose File) No file chosen

At the bottom of the form, there is a 'Submit' button and a note: 'Note 1: Clearance mails will be triggered to other stakeholder post clearance from Manager / HOD. Note 2: This is employee's responsibility to get clearance from the all Stakeholders.'

Business benefits

Post implementation of a bespoke employee exit management system, the client benefited significantly:

- The automation of the offboarding process led to a 40% reduction in processing time.
- Robust security features reduced data breach risks by 50%.
- Seamless knowledge transfer improved organizational continuity, reducing onboarding time for new hires by 20%.
- Enhanced process tracking capabilities resulted in a 30% increase in efficiency for HR departments.
- Streamlined procedures and reduced manual efforts led to a 25% decrease in operational costs associated with employee exits.

About Aufait Technologies

Aufait is a trusted software product engineering and digital transformation partner that empowers enterprises to transform ideas to commercially successful products and run highly profitable businesses. We help organizations adopt disruptive technologies such as AI and ML, Enterprise 2.0, Mobility and Cloud.

Aufait offers end-to-end enterprise solutions; from concept to design, design to development and implementation, to product launch and continued high-impact digital marketing services to transform your idea to a unicorn, Aufait Technologies is your one-stop destination for all IT solutions.

As a Microsoft Gold Partner with Portals and Collaboration competency and Yammer affiliate, Aufait offers enterprise solutions such as Intranet/Internet Portals, Document Management Solutions (DMS) and Workflow/BPM solutions around SharePoint and Office technologies.

Organization

Aufait
Technologies

Contact info
info@aufait.in

United States

#1041, 20289 Stevens Creek
Blvd Cupertino, CA 95014

+1 (408) 878 6244

Bangalore

No 198, CMH Road, Second
Floor, Suite No 1322,
Indiranagar,
Bangalore-560038

+91 623 560 0444

Calicut

Sahya building, Govt.
Cyberpark, Calicut - 673014

+91 956 755 5110