

HR15 · STEP 4 · FINAL

Offboarding & Exit Interview Capture

Exit Theme Summary

Validated departure themes with supporting quotes, priority follow-ups, owners, and signals to feed engagement review.

ABOUT THIS DOCUMENT

This is a **sample** deliverable from the **Offboarding & Exit Interview Capture** workflow (HR15) in AGASI AiOS. It shows the expected structure and tone. All names, numbers, and facts are **fictional**.

Exit Theme Summary

Compiled by: HR Coordinator, People & Culture - Northbridge Advisory Partners Date: Current offboarding cycle Scope: Three voluntary departures processed in the current exit batch Downstream use: This document feeds into HR17 - Engagement Survey Insights & Actions

Departure Context

Three employees departed Northbridge Advisory Partners voluntarily in the current spring exit window:

- Senior Consultant, Data & AI Advisory** - 3 years 2 months tenure. Resigned for a 22% compensation increase at a competitor. Strong performer; departure was compensation- and progression-driven. Exit interview completed (date on file).
- HRIS Analyst, HR Systems** - 1 year 9 months tenure. Resigned citing limited career progression and a gap between the role as advertised and actual responsibilities. Exit interview completed (date on file).
- Associate Consultant, Risk & Compliance Advisory** - 8 months tenure. Resigned citing poor onboarding, role misalignment from hiring, and insufficient management support. Exit interview completed (date on file; abbreviated format; notes summarised rather than verbatim).

All three departures are voluntary resignations. The current firm-wide voluntary turnover rate is 16%, against an 11% target. The firm-wide exit interview completion rate is 41%, against an 80% target. This batch achieved a 100% completion rate (3 of 3), though the third interview was delayed and abbreviated.

Exit Themes

#	Theme	Sentiment	Category	Frequency	Supporting Evidence
1	Below-market compensation	Negative	Compensation	1 of 3	Senior Consultant: "my total comp has barely moved"; "3% increase last cycle"; new offer is "about 22% above where I am now"; raised with Practice Head 6 months ago and told "we're working on a market adjustment" but nothing happened. (Current firm-wide compensation benchmark gap: 14%, target 5%)
2	Unclear career progression and promotion criteria	Negative	Growth	2 of 3	Senior Consultant: "no structure around progression"; "told I'd be considered for Senior Manager title this year but there's no published criteria, no timeline"; new employer "has a published career framework with clear milestones." HRIS Analyst: "limited career progression opportunities"; "the move was never formalised"; "there just isn't a structure to support internal mobility here."
3	Role misalignment between hiring promise and actual work	Negative	Management	2 of 3	HRIS Analyst: job ad mentioned "analytics and insights" but "reality has been almost entirely system admin work." Associate Consultant: role was "completely different" from what was described; "expected client-facing risk advisory work but spent most of the time doing internal compliance documentation"; "the hiring process oversold the role."
4	Poor or absent onboarding	Negative	Culture	1 of 3	Associate Consultant: described onboarding as "chaotic"; "no structured onboarding plan"; "given a laptop and a SharePoint link on day one and told to 'get up to speed'"; "no buddy, no 30-60-90 plan"; "other new hires in the practice had a similar experience." (Current firm-wide 30-day onboarding completion rate: 63%, target 92%)
5	Post-acquisition cultural fragmentation	Negative	Culture	2 of 3	Senior Consultant: "after the acquisitions everything feels fragmented"; "still don't have a single way of doing things"; "Meridian people do things one way, legacy Northbridge another"; "creates friction, especially on cross-practice projects." HRIS Analyst: referenced the grade mapping problem from the Meridian acquisition sitting in a backlog; dual-platform reconciliation from unfinished migration.
6	Under-resourcing and workload unpredictability	Negative	Workload	2 of 3	HRIS Analyst: "running at two analysts for a three-analyst workload since the managed-services contract started." Associate Consultant: workload was "unpredictable"; "pulled onto a compliance audit project with no context or briefing"; "basically thrown in and expected to figure it out."
7	HRIS data quality issues and system fragmentation	Negative	Other	2 of 3	Senior Consultant: "waste time reconciling data between systems"; "HRIS data is a mess - I still show up as grade C3." HRIS Analyst: "running two HRIS platforms in parallel"; "double entry for some records and constant reconciliation"; "flagged at least fifteen records where the old system and the new system disagree on job grade or reporting line."

#	Theme	Sentiment	Category	Frequency	Supporting Evidence
8	Insufficient management availability	Negative	Management	1 of 3	Associate Consultant: direct manager (Practice Head) was "hard to reach" and "often travelling"; "no regular check-in cadence."
9	Lack of team cohesion in some practices	Negative	Culture	1 of 3	Associate Consultant: "no sense of team - everyone's on their own client."
10	Strong direct team relationships	Positive	Culture	2 of 3	Senior Consultant: "the project work has been good"; "the team is strong"; Practice Head is "a good leader - supportive, technically sharp." HRIS Analyst: "the HR Systems team is great - very collaborative."
11	Exit data not being used for improvement	Negative	Other	1 of 3	Senior Consultant: "I'd suggest the firm actually uses exit interview data"; "two other people who left from our practice last quarter and said similar things"; "if nobody's tracking the patterns, nothing changes."
12	Low engagement survey scores reflecting lived experience	Negative	Culture	1 of 3	HRIS Analyst: "the engagement survey results probably reflect what I'm saying"; "team's scores for 'career development' were in the low 50s." (Current firm-wide engagement favourability: 67%, target 78%.)

Follow-Up Actions

#	Theme(s)	Action	Owner	Priority	Target Date
1	Below-market compensation (#1)	Conduct targeted compensation benchmarking for the Data & AI Advisory practice, starting with Senior Consultant and Senior Manager bands. Compare current offers against the 14% benchmark gap. Present findings to the HR Director with adjustment recommendations.	Compensation Analyst, Total Rewards	Immediate	Within 3 weeks of this summary
2	Unclear career progression (#2)	Draft a career progression framework for the Data & AI Advisory and HR Systems teams. Include published criteria, promotion timelines, and internal mobility pathways. Circulate to Practice Heads and the HR Director for review.	L&D Manager, People Development	Short-term	Within 6-8 weeks of this summary
3	Role misalignment (#3)	Audit current open job descriptions in Risk & Compliance Advisory and HR Systems against actual role responsibilities. Flag discrepancies and require hiring manager sign-off on updated descriptions before any new postings.	Talent Acquisition Lead	Immediate	Within 3 weeks of this summary
4	Poor onboarding (#4)	Verify that all practices are using the standard onboarding checklist. Investigate why the Risk & Compliance Advisory practice did not use the standard process during the managed-services ramp-up. Report gaps to the HR Director.	Employee Relations Specialist, People Operations	Immediate	Within 2 weeks of this summary
5	Post-acquisition fragmentation (#5)	Escalate to the HR Director the recurring theme of cultural fragmentation across legacy Northbridge and Meridian teams. Recommend a cross-practice integration working group with representation from at least 3 practices.	HR Coordinator, People & Culture	Short-term	Within 6-8 weeks of this summary
6	Under-resourcing (#6)	Review staffing levels in HR Systems against current workload (data migration backlog, dual-platform operation). Present a business case to the HR Director for backfilling the HRIS Analyst role and assess whether a third analyst is needed.	HRIS Administrator, HR Systems	Immediate	Within 2 weeks of this summary
7	HRIS data quality (#7)	Prioritise the resolution of the ~40 legacy grade mapping records from the Meridian acquisition. Set a deadline for completing the dual-platform migration and eliminating reconciliation overhead.	HRIS Administrator, HR Systems	Short-term	Within one planning quarter
8	Management availability (#8)	Raise the absent-manager feedback with the Practice Head, Risk & Compliance Advisory through the HR Director. Recommend establishing a minimum fortnightly check-in cadence for all new hires in the first 6 months.	HR Director, People & Culture	Short-term	Within 6-8 weeks of this summary

#	Theme(s)	Action	Owner	Priority	Target Date
9	Exit data utilisation (#11)	Establish a quarterly exit theme review meeting with the HR Director, Talent Acquisition Lead, and Employee Relations Specialist. Use this Exit Theme Summary as the pilot report format.	HR Coordinator, People & Culture	Long-term	Next review cycle (L&D to schedule)

Action Summary

- **Immediate actions:** 4 (compensation benchmarking, job description audit, onboarding gap investigation, HR Systems resourcing)
- **Short-term actions:** 4 (career framework, integration working group, data quality cleanup, management cadence)
- **Long-term actions:** 1 (quarterly exit theme review)
- **Themes with no dedicated action:** Theme 10 (strong direct team relationships - positive; note as a retention factor to preserve), Theme 12 (low engagement scores - addressed indirectly through actions on themes 2, 5, and 6; direct analysis deferred to HR17 Engagement Survey)

Offboarding Status

Employee	Role	Last Working Day	Checklist Status	Notes
1	Senior Consultant, Data & AI Advisory	On file in departure details	In progress	Knowledge transfer and client handover underway; 2 active client projects require structured handover with senior team member overlap
2	HRIS Analyst, HR Systems	On file in departure details	In progress	HRIS admin handover sessions scheduled; team down to 2 analysts - handover critical for data migration continuity
3	Associate Consultant, Risk & Compliance Advisory	On file in departure details	Complete	Short tenure and limited system access; minimal handover scope; job grade was never assigned

Recommendations for Engagement Review

The themes from these three exits align with patterns visible in the firm-wide metrics: voluntary turnover at 16% (target 11%), engagement favourability at 67% (target 78%), and 30-day onboarding completion at 63% (target 92%). Two themes - unclear career progression and post-acquisition fragmentation - appeared in multiple exit interviews and should be cross-referenced with engagement survey dimension scores for "career development" and "organisational culture" when HR17 (Engagement Survey Insights & Actions) is executed. The compensation benchmark gap of 14% (target 5%) is directly corroborated by the Senior Consultant's reported 22% shortfall; this warrants urgent analysis through the compensation review cycle (HR16).