

EMPLOYEE TERMINATION TEMPLATE

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TASK NAME	COMMENTS	ASSIGNED TO	DATE DOCUMENTED
DOCUMENT PERFORMANCE ISSUES			
EXAMPLES OF SUB-PAR PERFORMANCE (OVER PREVIOUS 6 MONTHS)			
(EXAMPLE) Frequent undocumented absence from work			
(EXAMPLE) Tendency to delegate work that is assigned to them			
(EXAMPLE) Poor organizational and time management skills leading to missed deadlines	TIP: Be specific. If you can list lost time or revenue due to missed deadlines, a better case is developed.		
(EXAMPLE) Failure to notify management of expected budget overruns	TIP: Save e-mail interactions and status reports so that time-stamped documentation exists		
CONDUCT PEER REVIEWS			
Conduct a 360 degree peer reviews	TIP: Perform reviews on a number of employees simultaneously. This will prevent an employee from feeling singled out.		
Ask peers to rate colleague in a variety of categories			
Teamwork			
Efficiency			
Productivity			
Knowledge of job			
Ask employees to rate the poor performer's manager	TIP: You want to be sure you've established that the poor performer's manager is not widely regarded as a bad supervisor.		
Ask direct manager for feedback as well as indirect managers			

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ACQUIRE CUSTOMER FEEDBACK (IF CUSTOMER FACING)			
Request customer feedback on recent interactions with employee			
Was the employee responsive?			
Were they prompt and courteous?			
DOCUMENT ATTEMPTS TO IMPROVE PERFORMANCE			
Create a 1-3 month Performance Improvement Plan (PIP)	TIP: Clearly document deficiencies in past performance and what is required to maintain employment.		
Conversation between manager & employee regarding work ethic			
Make sure to document checkpoints during PIP period			
PERFORM FINAL EVALUATION			
Assess employee's ability to work in another company position			
Review the 'Employee Exit Template' for a list of things to collect upon termination			
Map out when and where the exit process will take place. Who will be in attendance?			
Enlist a HR staff member to brief the employee on COBRA, etc.			
Notify finance of employee status so that final paycheck is properly processed			
Back up the employee's files/e-mail prior to termination			
Be clear and cite failure to meet goal outlined in PIP			

TASK NAME	COMMENTS	ASSIGNED TO	DATE DOCUMENTED
THINGS TO KNOW			
Important Laws to Review (or have your attorney brief you)			
Title VII			
ADEA			
ADA			
Whistle-blower laws			
FMLA			
ERISA			

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