**Background of the Company**

Our Project selection was influenced by observations made at PricewaterhouseCoopers Ltd, India, where we identified the offboarding process as an area of interest. This process is followed by PWC in India. PWC is a multinational professional services firm that offers a range of services, including audit and assurance, tax advisory, consulting, and legal services.

PWC is one of the “Big Four” accounting firms, which also includes Deloitte, Ernst & Young(EY), and KPMG. These four firms are considered the largest and most influential in the accounting industry, and they provide services to a significant proportion of the world’s largest companies.

**Problem**

* The company's existing offboarding process takes a lot of time because an employee must obtain authorization from ten or more departments to return their equipment, turn off IT accesses, etc. Each department must be contacted and given at least 24 hours to respond.
* The complicated process causes significant delays in the offboarding process, and the employee must devote a lot of time to offboarding while also working on closing out their ongoing assignments.

**Current process**

The current offboarding process is a lengthy and stressful affair for employees, requiring several steps that can be time-consuming. Additionally, revoking clearances from various departments can lead to significant delays in completing the process.

* The Employee sends their resignation to their manager
* The manager conducts an exit interview and attempts to retain the employee
* If the employee is retained, no further action is taken
* If the employee is not retained, the manager verifies pending projects, talks to the project manager, and ensures all outstanding work is completed within the notice period
* The outgoing employee gives knowledge transfer (KT) to a designated person
* The manager sends the resignation notice to HR department for final paperwork
* The employee is asked to authorize all departments to revoke clearances
* Each department verifies clearances are revoked and may ask for additional information from the manager or employee to do so
* The employee returns assets via courier or in person on the last working day
* The HR department handles final paperwork, pay, benefits, and confirmations from all departments
* The IT department is informed and suspends access to internal servers and email.

**Solution**

To create a better offboarding process for both the organization and the employee, it is crucial to designate HR as the primary point of contact once the employee's resignation has been confirmed, following the exit interview. HR will then be in charge of authorizing all relevant departments to revoke clearances for that specific employee and checking with the employee directly to ascertain whether there are any lingering questions.

The revised procedure will make it easier for the employee to leave without feeling pressured to complete all the processes. The manager does not need to be included at each stage because they are updated on final statuses at employee termination.

**Modified Process**

* To address these pain points, HR is the primary point of contact following the exit interview. They are responsible for authorizing all relevant departments to revoke clearances for that specific employee and consulting with them directly if there are any additional questions.
* The manager examines the employee’s ongoing projects and confirms that all of their project-related work will be finished by their last day of employment.
* The manager requests that the employee passes on their knowledge to a designated employee.
* The employee's primary point of contact for questions about their notice period up until their final day of employment will be the HR department after the manager has given their consent.
* HR will get in touch with all departments to inquire about the employee's clearances and will ask the employee if any more information is required.
* HR will prepare the final documents, the final paycheck, and email the employee requesting the surrender of any assets on their last day of employment.
* On the last working day for the employee, HR will confirm that everything has been approved for that employee and determine when the employee will deliver the assets.
* HR will notify the IT department to remove access to internal systems.

**Specific Issues Being Resolved & Benefits**

The modified offboarding process provides several benefits to the employee and the company while resolving issues with the current process, such as:

* Reducing the burden on the outgoing employee by simplifying the clearance process and minimizing the number of requests and follow-ups they need to make with different departments.
* Ensuring that all the employee's projects are completed before their last day, reducing the risk of unfinished work or delays.
* Helping the designated employee who takes on the outgoing employee’s work has a smooth transition by providing adequate knowledge transfer.
* Centralizing the communication and coordination for offboarding with HR, minimizing the chances of miscommunication or confusion.
* Streamlining the paperwork, pay, and benefits process, making it more efficient for the HR department.
* Ensuring that all company assets are returned on time, reducing the risk of loss or damage.
* Protecting the company's sensitive data by revoking access to internal systems and email on the last working day

**Business Rules**

1. An employee can work in only one department.
2. An employee can supervise zero or may employees and every employee must have one supervisor.
3. Each department must have an HR manager, who is an employee.
4. An employee can hold only one job title at a time.
5. Each job title has a job description, minimum salary, and maximum salary.
6. An employee can own or have access to company assets, and the ownership/access can have a start and end date.
7. Company assets belong to a department and can be physical assets, clearances, or IT access.
8. Physical assets have their condition checked and recorded. Their ownership status is also tracked (either owned, rented, or in stock).
9. Types of clearances include manager notice, digital lock combination, and group area password.
10. For IT Access Assets, the type is also recorded. The location of the IT access is also kept (this can be the network location or URL).
11. The company uses withdrawal paperwork to record the resignation process. The paperwork has a unique resignation ID, a notice date, a last working date, a reason for leaving, and Department signoff.
12. An employee can receive paychecks, and each paycheck has a unique paycheck ID, a date, and an amount. The paychecks also have a memo field which can be one of the following values: salary, severance, final paycheck, or benefit.
13. To fill a vacancy when an employee resigns, the Department can create a new hire posting that requires their endorsement, a job title, a posting date, and a posting description.