Competitor Analysis: Comparison of Offboarding Tools

As part of improving the EMS (Exit Management System) process, I conducted a comparative analysis of popular HR/offboarding tools. The goal was to identify standard industry features and explore opportunities to enhance the EMS experience for both HR personnel and departing employees.

I examined three widely used platforms: **BambooHR**, **Gusto**, and **Workday**. Each offers a suite of offboarding capabilities tailored to organizations of various sizes. By evaluating their strengths and limitations, I was able to draw key conclusions that can directly inform improvements to our current EMS workflow.

Key features found across most tools:

- **Automated Exit Surveys**
  All platforms allow companies to send surveys to departing employees automatically, which improves completion rates and ensures data consistency
- **Role-Based Access**
  HR staff, managers, and employees have differentiated access to relevant features and visibility. This avoids confusion and improves security
- **Task & Document Checklists**
  These platforms provide customizable task checklists for managers and employees to ensure all offboarding steps are completed (e.g., returning equipment, revoking access, final feedback)
- **Offboarding Dashboards & Analytics**
  BambooHR and Workday offer dashboards that summarize exit reasons and trends over time, providing HR with meaningful insights

Common Limitations:

- **Limited Personalization**
  Most systems don't offer deep customization by department or team, which could be useful in larger organizations
- **Over-Reliance on Forms**
  Feedback collection is often just a form submission, with little interactivity or real-time support options
- **Restricted Analytics (Paywalled)**
  More advanced metrics or downloadable reports are sometimes locked behind premium plans, reducing accessibility for smaller teams

Based on this analysis, the following improvements are recommended for EMS:

- **Integrate an Automated Survey Workflow**
Automating the exit survey process will help streamline data collection and ensure timely responses

- **Build a Clear Offboarding Checklist**
A simple, role-based task list for HR and managers would reduce confusion and ensure every offboarding task is completed

- **Implement Feedback Dashboards**
Displaying exit feedback in visual formats (e.g., pie charts or bar graphs) will help HR identify trends and improve retention strategies

- **Include Role-Specific Views**
EMS should offer tailored views and controls depending on whether the user is HR, a manager, or the employee exiting