

Unleash the true potential of your **workforce**

Workflows - from
performance to exit

**Actionable Templates for
Workforce Management**



Engaging your workforce is tough! **We make it simpler.**

With the right workforce management templates, you could save significant costs and unlock productivity.

That's why we made these templates that help you manage performance management, transfer and exit workflows. These templates account for both common & uncommon use-cases.

Legend

LWD - Last Working Day

NDC - No Due Certificate

BGV - Background Verification

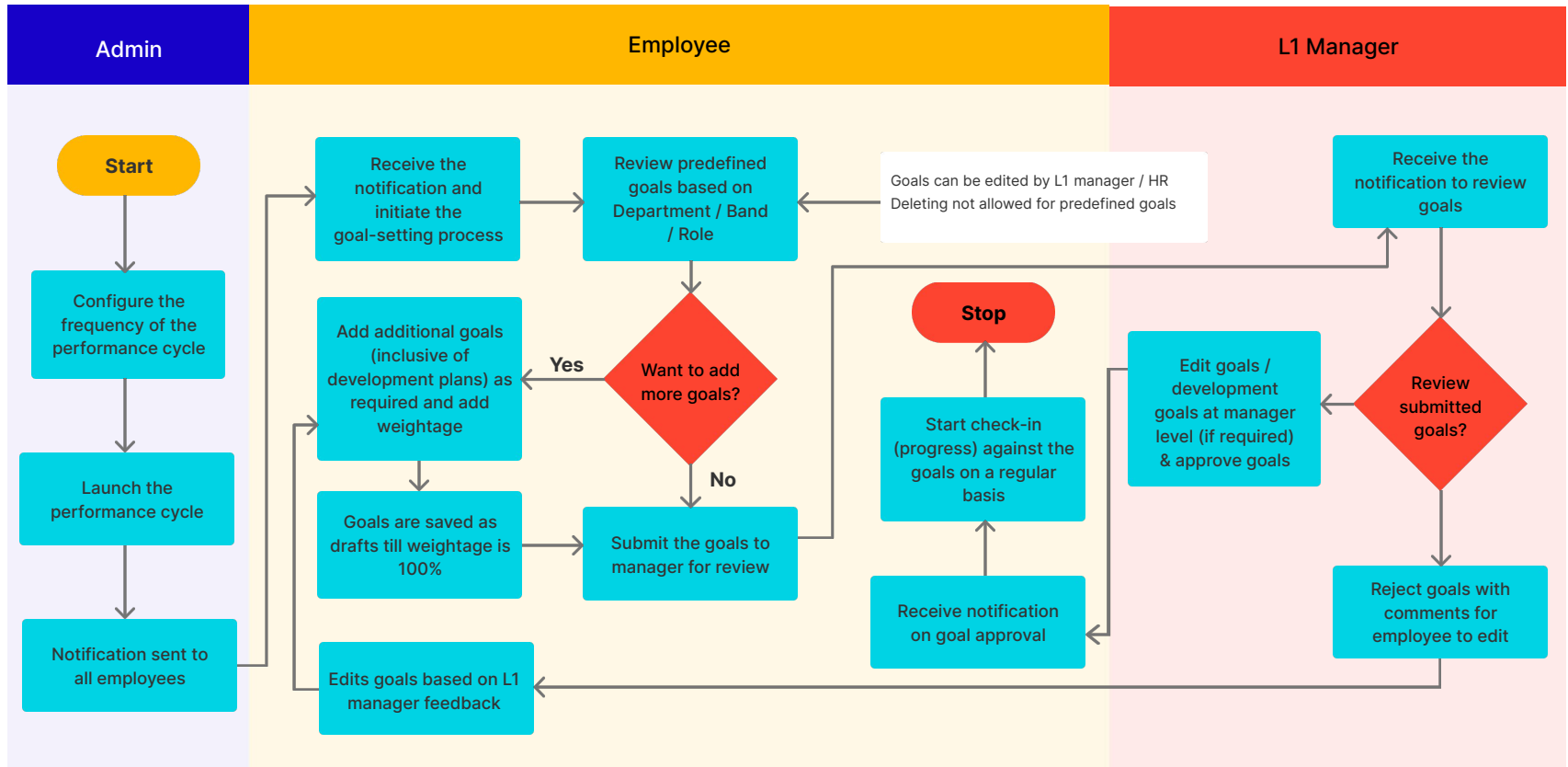
FNF - Full and Final Settlement

TM - Talent Management



Please note, these templates are made with an assumption that most organizations would have an HRMS tech. These templates can be used even if there isn't an advanced workforce management stack in place.

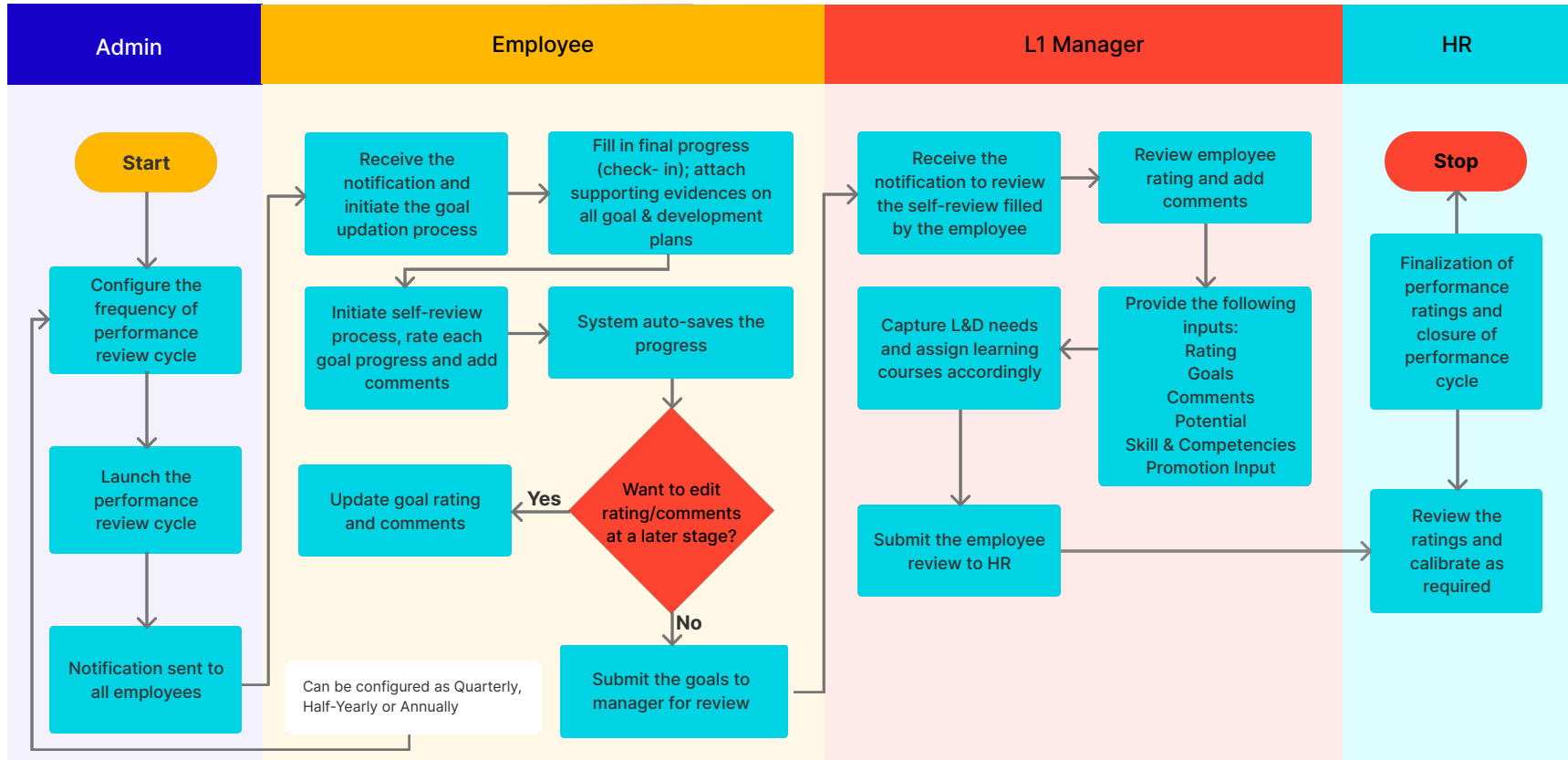
Performance Goal Setting Process



Performance Goal Setting Process - Other Key Points to Consider

- ❑ Define goal cycle based on the calendar year/financial year
- ❑ Define the goal setting framework (MBO, BSC or OKR)
- ❑ Define goal setting rules and configuration (Impact area, Company Goals, and Collaborative goals)
- ❑ Define company priorities (mandatory and non-mandatory)
- ❑ Create goal library (department and designation)
- ❑ Define goal measure types (Metric / Progress/ Boolean)
- ❑ Define continuous performance process on goals, 1-on-1, and feedback on behaviours, competencies and values
- ❑ Define the 9-box grid

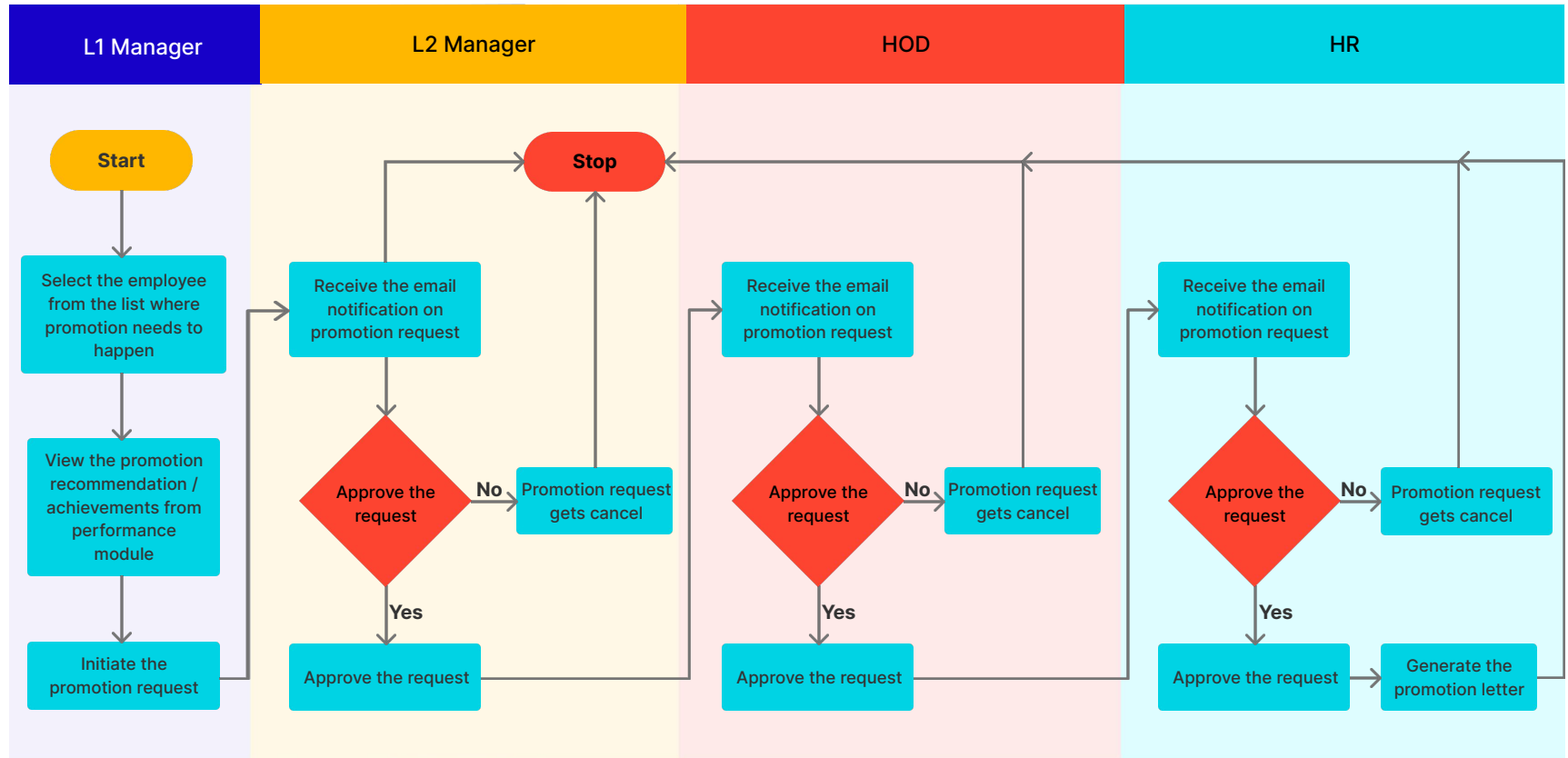
Performance Review Process



Performance Review Process - Other Key Points to Consider

- ❑ Define review cycle and duration (Yearly, Half-yearly, Quarterly, Monthly)
- ❑ Identify eligible audience for specific performance review (Basis Date of Joining, Department / Band / Role and Employee Category)
- ❑ Define performance review workflow with required stakeholder (Employee, L1 Manager, L2 Manager)
- ❑ Define stakeholders for normalisation process
- ❑ Define elements of performance review (Goals, Competencies & Skills defined by Role, and Behaviour Competencies and Attributes)
- ❑ Define multi-rate configuration
- ❑ Define Rating Scale (Goals, Competencies & Skills define by Role, and Behaviour Competencies and Attributes)

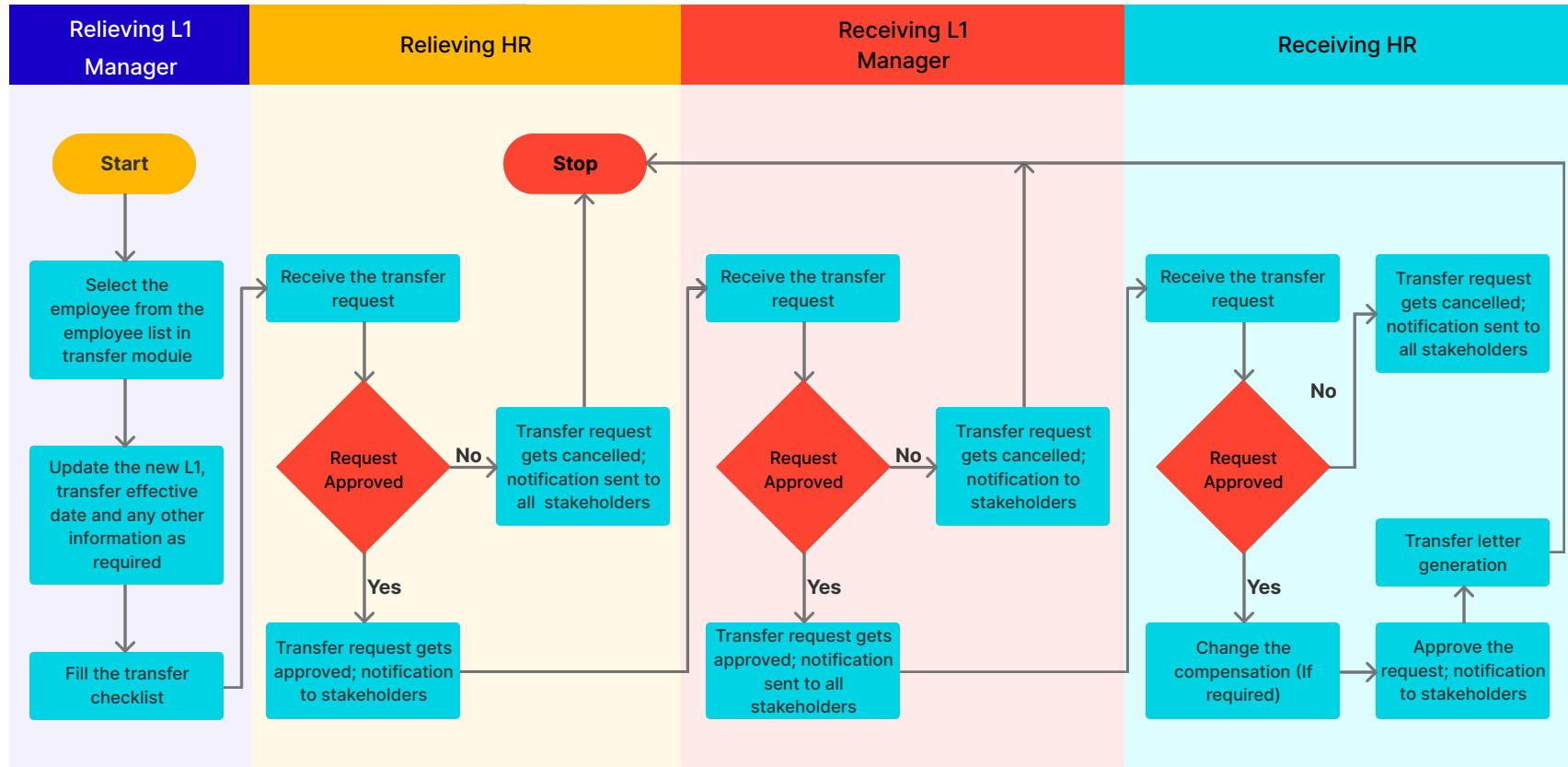
Promotion Process



Promotion Process - Other Key Points to Consider

- ❑ Define the promotion policy (eligibility, prerequisites etc.)
- ❑ Define exception scenarios and their handling
- ❑ Finalize the promotion workflow including any exceptional scenarios (actors and levels)
- ❑ Define promotion letter templates
- ❑ Define notification email templates / content
- ❑ Define reporting requirements

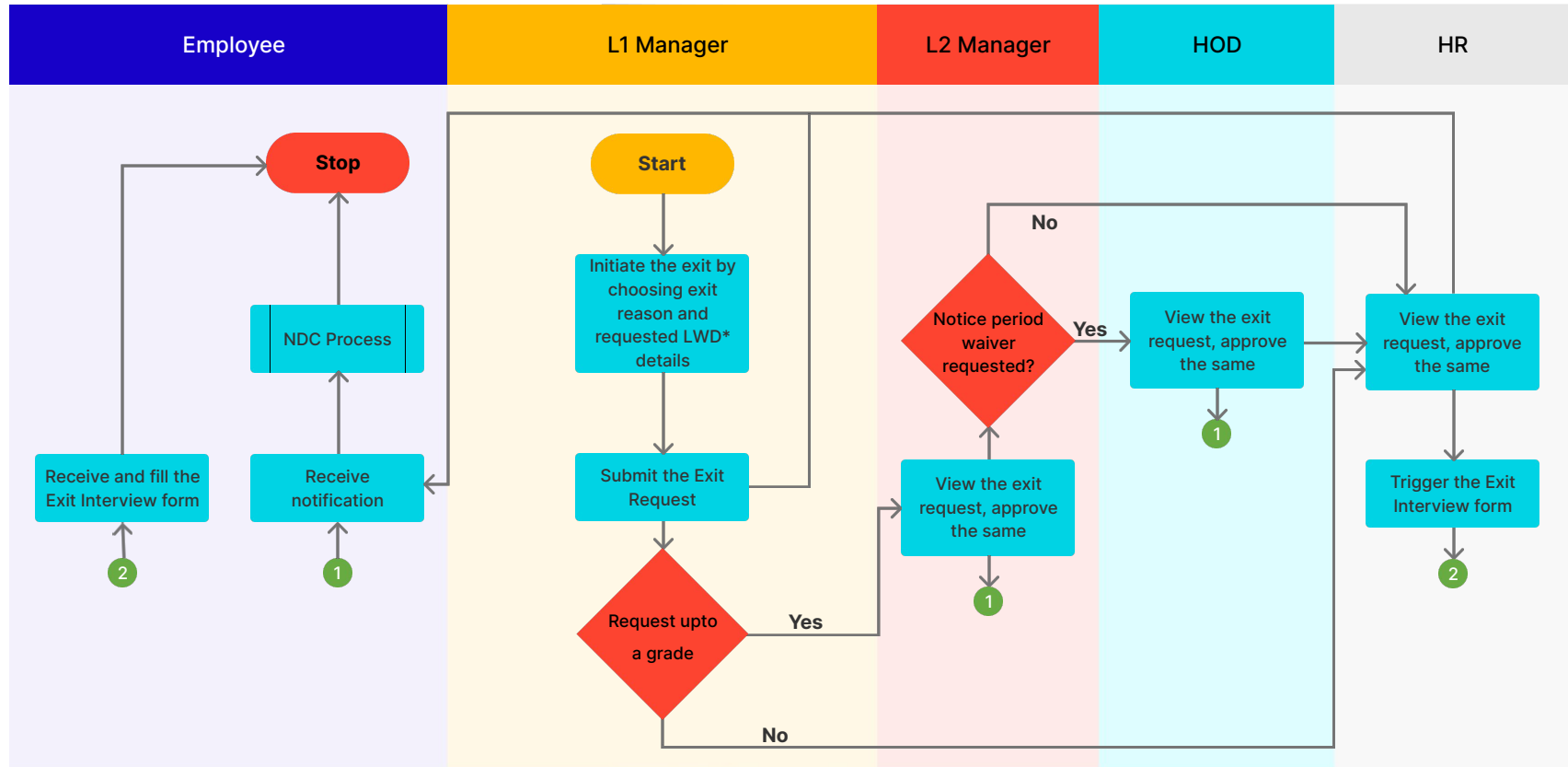
Transfer



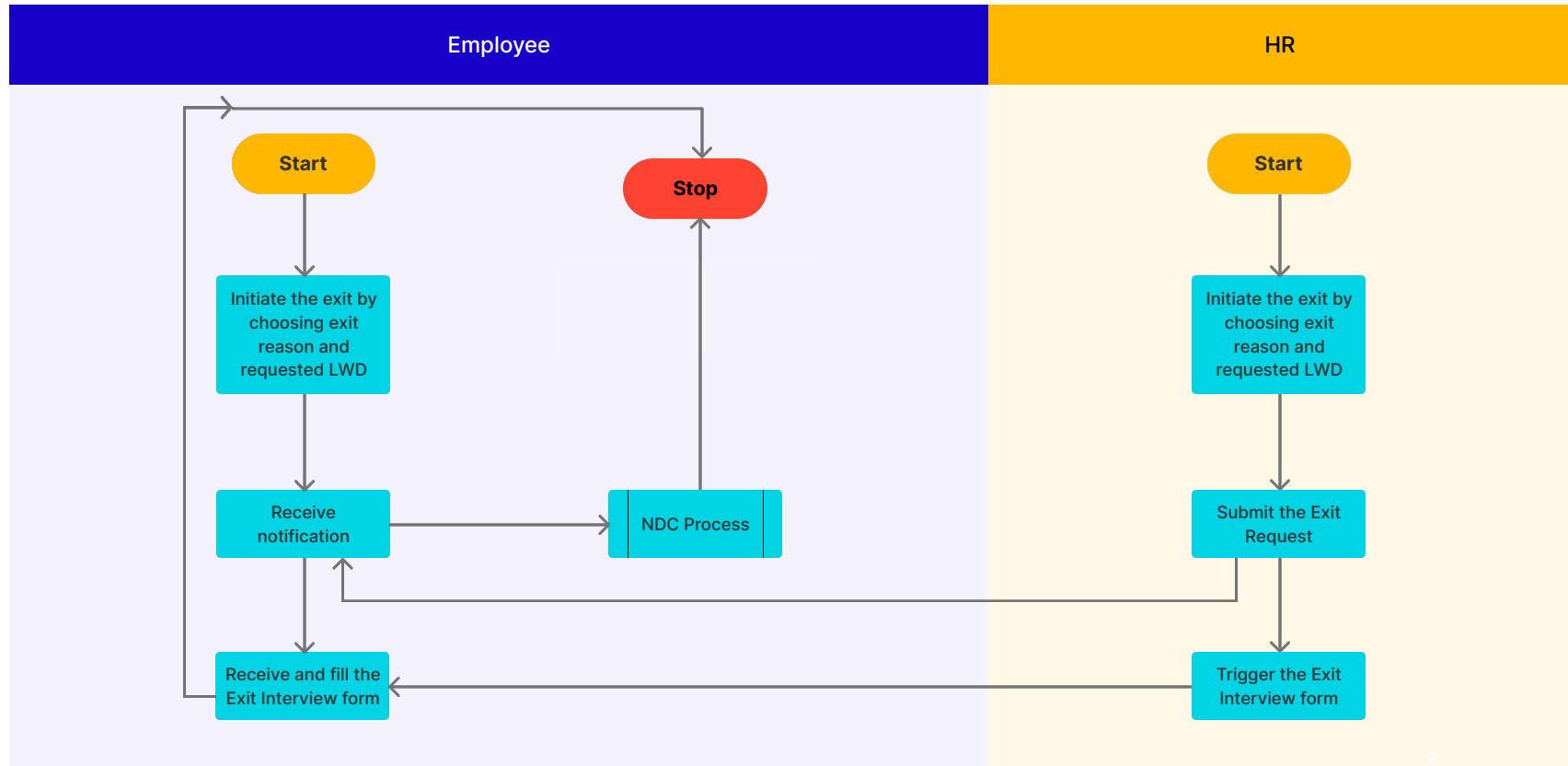
Transfer Process - Other Key Points to Consider

- ❑ Define the transfer policy (Type of transfers, eligibility, prerequisites etc.)
- ❑ Define exception scenarios and their handling
- ❑ Finalize the transfer workflow including any exceptional scenarios (actors and levels)
- ❑ Define transfer checklist at each workflow stage
- ❑ Define transfer letter templates
- ❑ Define notification email templates / content
- ❑ Define reporting requirements

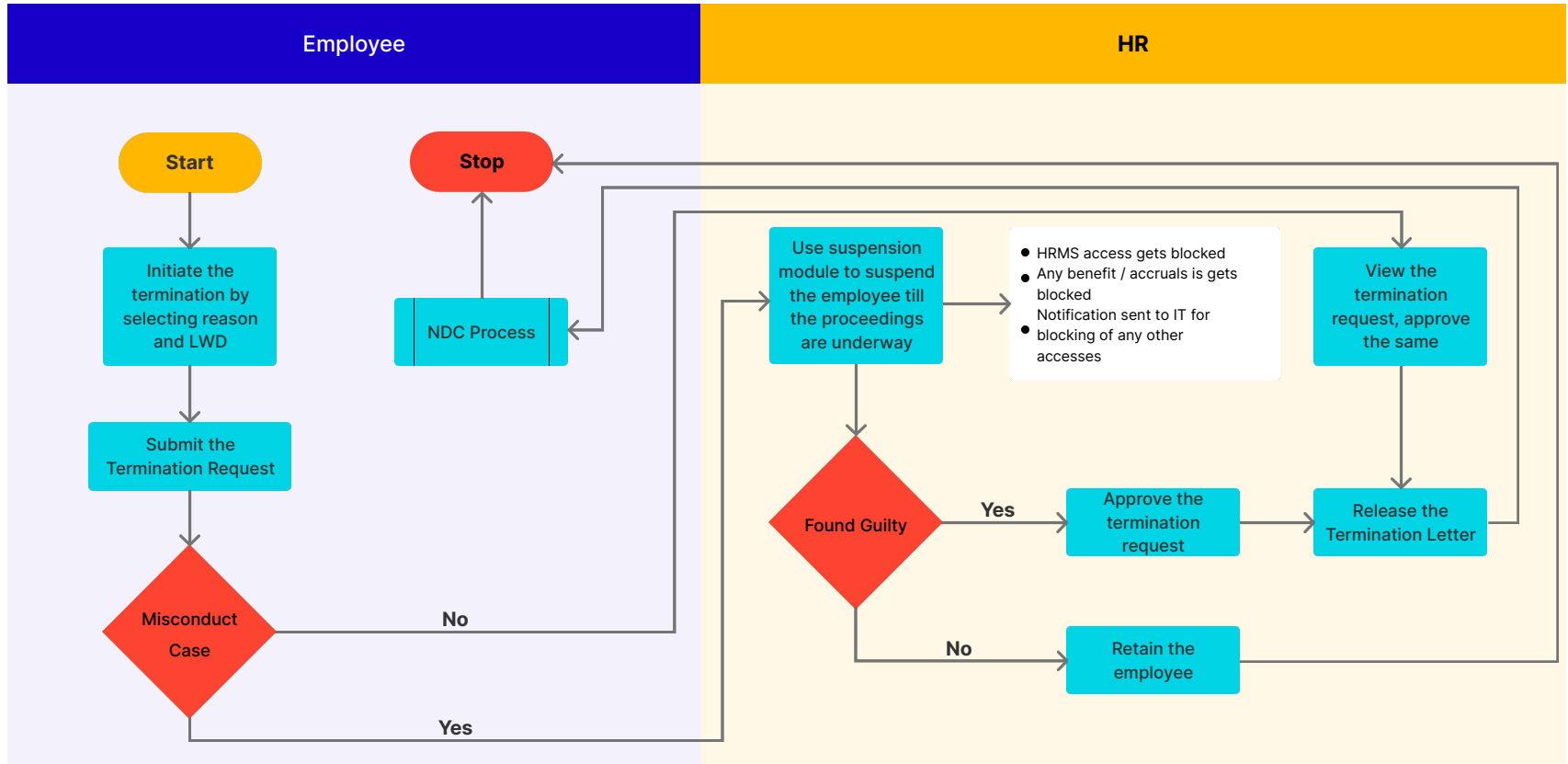
Exit Approval Process - Voluntary (L1 Manager)



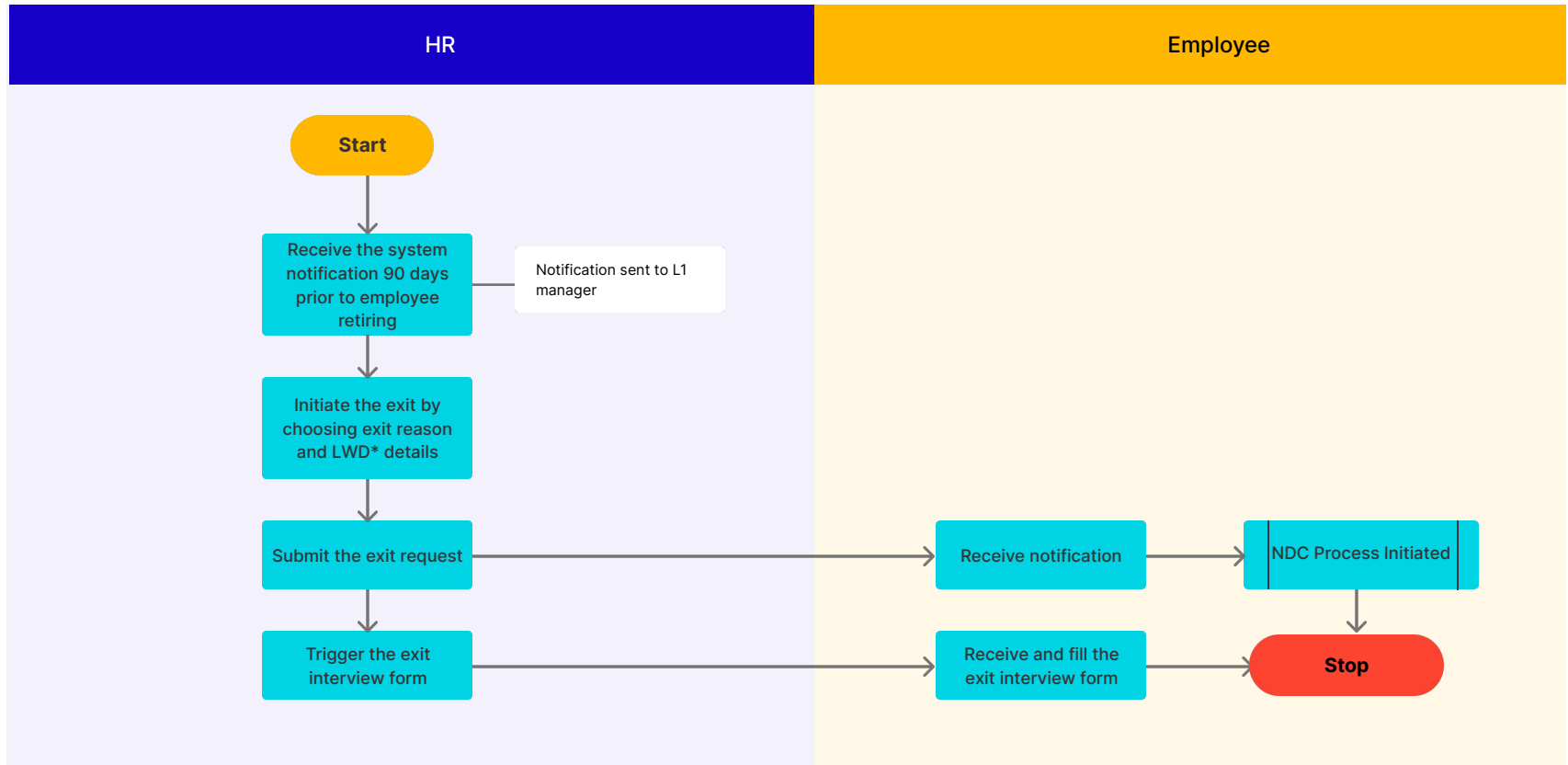
Exit Approval Process - Voluntary (HR)



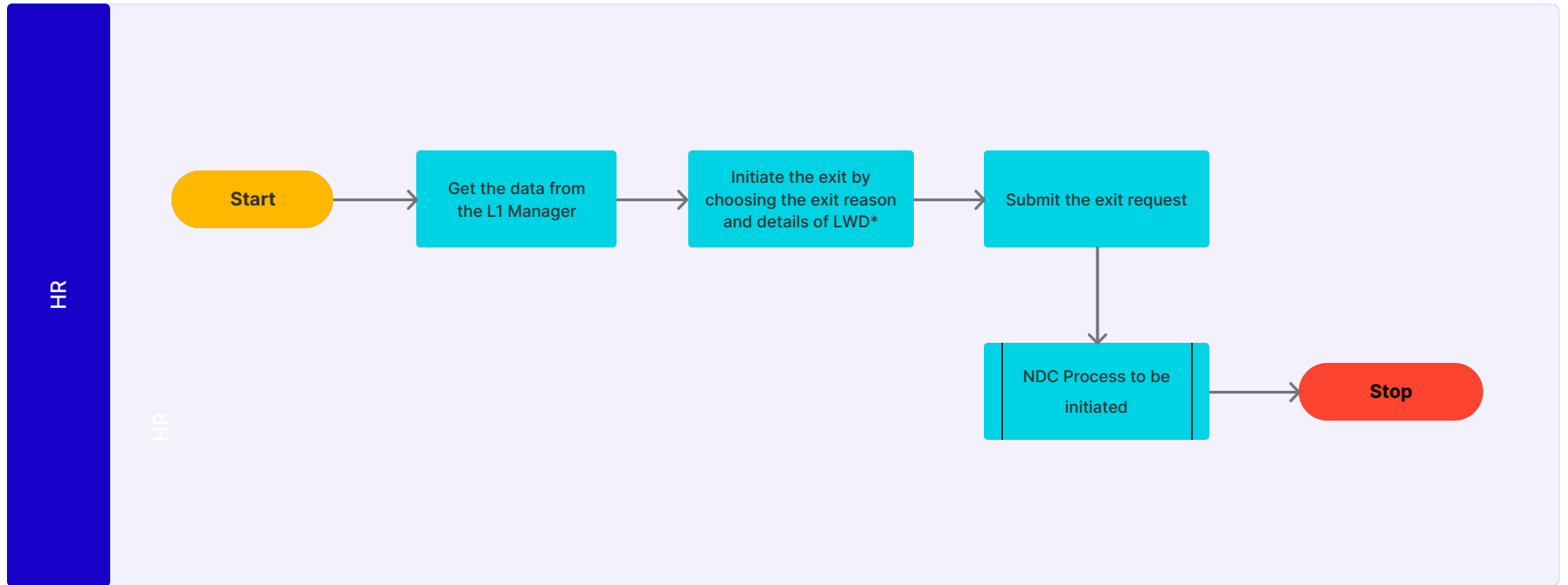
Exit Approval Process - Termination



Exit Approval Process - Retiral



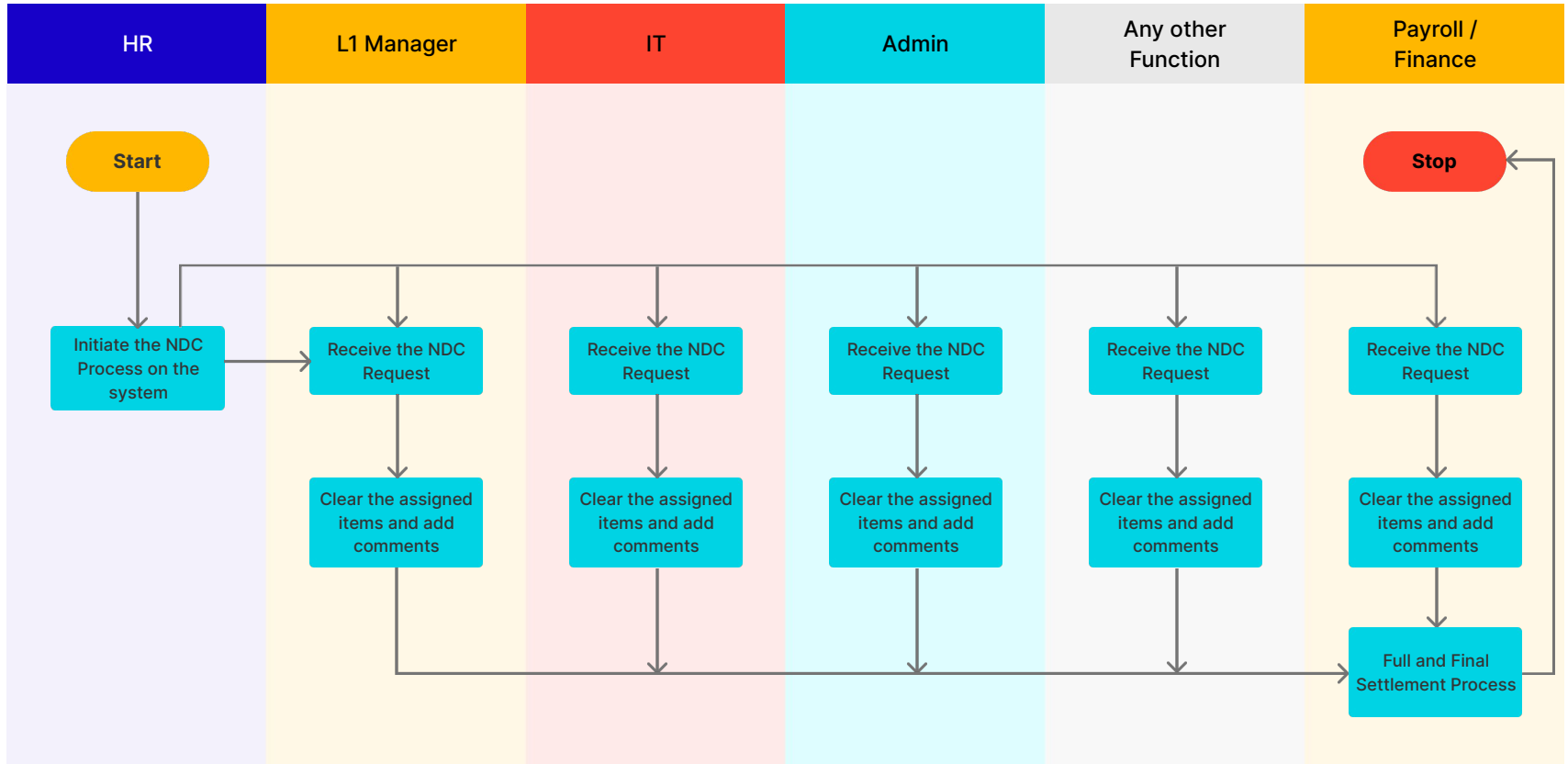
Exit Approval Process - Deceased



Exit Approval Process - Other Key Points to Consider

- ❑ Define the exit policy (basis type of exit)
- ❑ Define exception scenarios and their handling
- ❑ Finalize the exit workflow including any exceptional scenarios (actors and levels)
- ❑ Define notice period / pay waiver and rules to handle it
- ❑ Define notification email templates / content
- ❑ Define reporting requirements

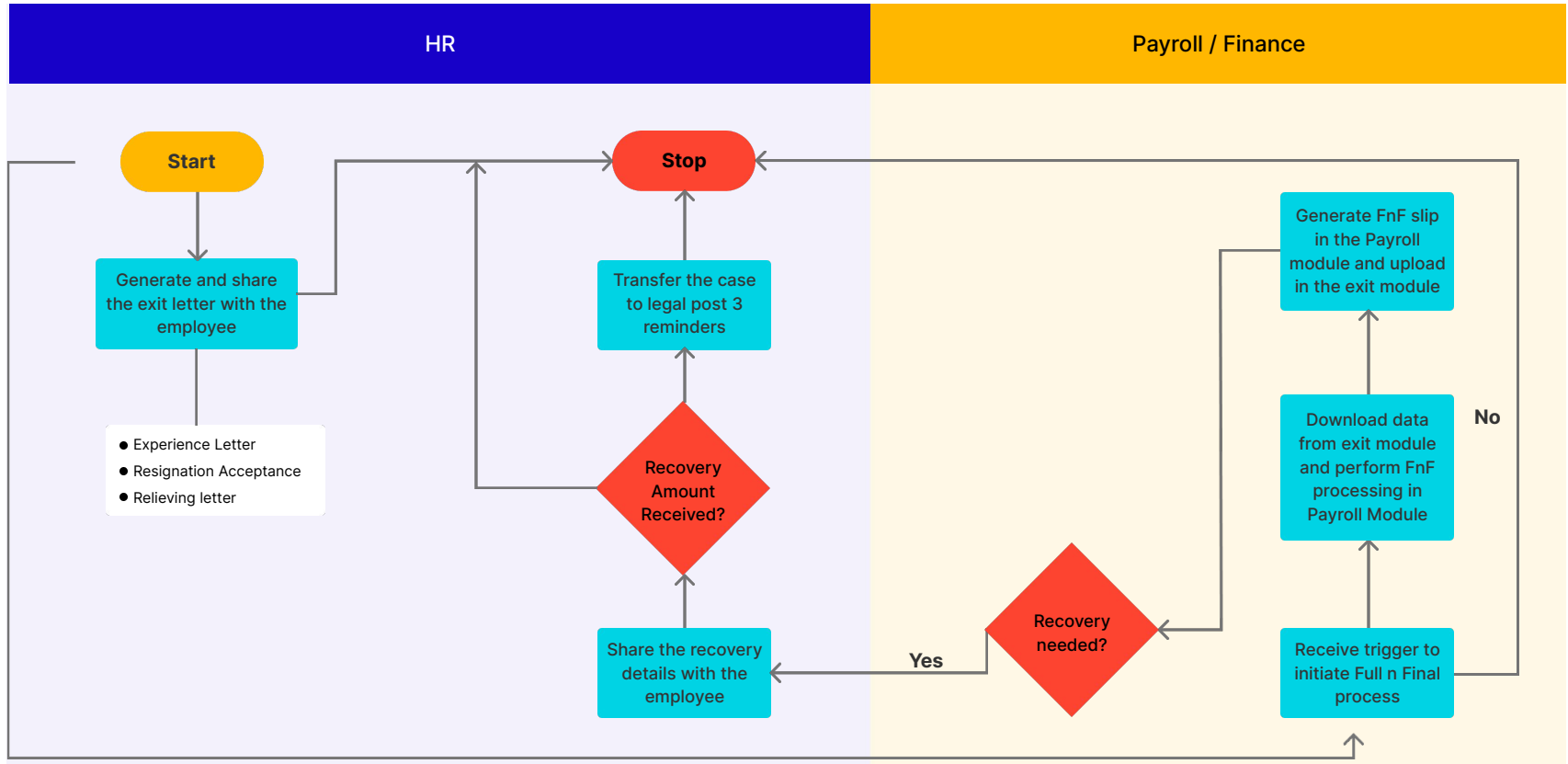
NDC Process



NDC Process - Other Key Points to Consider

- ❑ Define NDC* checklist
- ❑ Define actors / stakeholders for completion of NDC Checklist
- ❑ Define notification email templates / content
- ❑ Define reporting requirements

Full and Final Settlement



Full and Final Settlement Process - Other Key Points to Consider

- ❑ Define FnF* rules
- ❑ Define recovery process
- ❑ Define exit letter templates
- ❑ Define notification email templates / content
- ❑ Define reporting requirements

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98%

User Adoption



51

NPS Score by Users

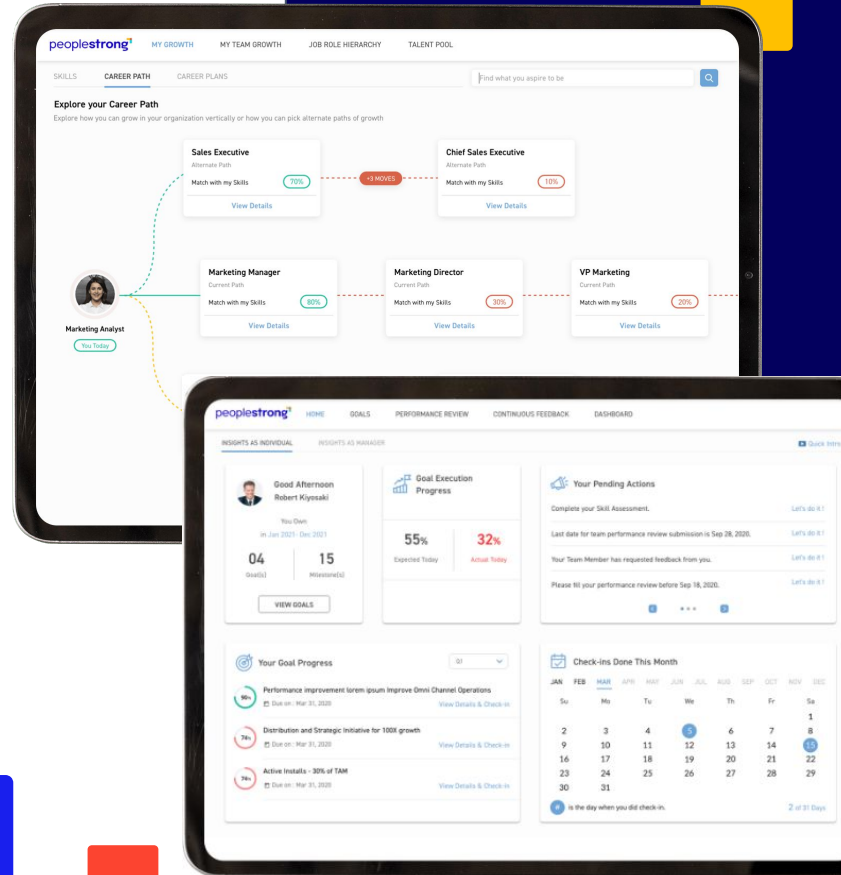


4.3

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- ❑ Real-time talent insights
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