

Ethan Morris
Sales Executive
Employer HR file

Date: 14 July 2026
Our Reference: EFS/8DF2AB52
Document Type: HR record

Exit Feedback Summary for Ethan Morris

1. CASE SUMMARY

Ethan Morris, Sales Executive at HRHeaven QA Sample Employer, attended an exit interview on 21 November 2025 as part of the conclusion of his employment. The interview provided an opportunity for Ethan to share his experiences and feedback regarding his role and the wider team environment.

This record summarises the key points raised during the interview, the context of his departure, the information considered by HR and management, the decisions taken in response, and any follow-up actions agreed.

2. BACKGROUND

Ethan Morris has been employed as a Sales Executive, and the exit interview was conducted shortly before the end of his employment to capture his reflections and insights.

The purpose was to gather constructive feedback that could support continuous improvement within the sales function and the organisation as a whole, and to identify any issues affecting employee experience.

The interview occurred on 21 November 2025 with Ethan present and engaged throughout.

HR RECORD DETAILS

Employee
Ethan Morris

Role
Sales Executive

Case type
Exit Interview

Reference
HRA-8DF2AB52

KEY DATES

Completed
14 July 2026

Continued

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3. INFORMATION CONSIDERED

During the exit interview, Ethan expressed concerns that the role involved an excessive amount of administrative tasks, which detracted from client-facing and sales activities.

He highlighted an absence of formal proposal templates to aid consistency and efficiency within sales processes.

Ethan also noted inconsistent use of the Customer Relationship Management (CRM) system across the team, which complicated pipeline visibility and activity reporting.

On a positive note, he praised the team culture for being supportive and collaborative, which he found beneficial.

Conversely, Ethan flagged unclear tracking of sales commissions and observed that line-manager HR record-keeping was sparse, suggesting potential gaps in employee support documentation.

The Marketing Manager, Saira Khan, verbally agreed during the interview to take responsibility for compiling the interview notes to present to the Board and to reassign any active sales leads held by Ethan.

However, no formal follow-up owner has been documented in the HR records to ensure these actions are tracked and completed.

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4. DECISION

It was agreed that Ethan's feedback would be reviewed by relevant stakeholders to consider its implications for sales process improvements, administrative support, and HR record-keeping practices.

Follow-up responsibility regarding the interview notes and lead reassignment was verbally accepted by the Marketing Manager, but formal ownership needs to be clearly assigned in company documentation to maintain accountability.

The exit interview has been completed and the feedback summary will be filed on Ethan Morris's HR record for reference and learning.

5. REASONS

The exit feedback was sought to gain candid insight into the Sales Executive role and team functioning, enabling targeted improvements.

Concerns raised around administrative burdens, absence of standardised proposal documentation, and CRM inconsistencies suggest areas where process optimisation could benefit remaining and future team members.

Recognition of positive team culture underscores the organisation's strengths and should be sustained.

Issues relating to unclear commission tracking and insufficient HR record-keeping require attention to uphold transparency and compliance as well as to support effective line management.

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6. FOLLOW-UP ACTIONS

Assign a formal owner within HR or management to ensure follow-up on Ethan's feedback, particularly regarding administrative process reviews, CRM consistency, commission tracking, and HR record-keeping enhancements.

Confirm with Saira Khan, Marketing Manager, her commitment to compile the exit interview notes and to coordinate the reassignment of Ethan's active sales leads.

Schedule a review of current sales documentation, including proposal templates, to identify opportunities for standardisation and efficiency.

Review commission tracking procedures for clarity and accuracy, involving HR and payroll functions where necessary.

Audit line-manager HR record-keeping practices to identify gaps and implement improvements to support employee management and compliance.

Set deadlines and monitoring dates to track progress on these actions, reporting updates to senior management as appropriate.

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7. AUDIT INFORMATION

Exit Interview reference: HRA-8DF2AB52

Interview date: 21 November 2025

Document preparation date: 14 July 2026

Prepared by: HRHeaven QA Sample Employer HR Team

Employee name: Ethan Morris, Sales Executive

Follow-up due date (overdue): 28 November 2025

Reminder: Follow-up ownership is not yet formally recorded and should be updated to ensure compliance and effective action tracking.