

Ethan Morris
Sales Executive
Employer HR file

Date: 14 July 2026
Our Reference: EIR/8DF2AB52
Document Type: Meeting notes

Exit Interview Record – Ethan Morris

1. MEETING PURPOSE

This meeting was held to conduct an exit interview with Ethan Morris, Sales Executive, following his decision to leave HRHeaven QA Sample Employer. The objective was to gather feedback about his role and work experience to inform future improvements and ensure a smooth transition. The interview was conducted on 21 November 2025.

2. ATTENDEES / CONTEXT

Ethan Morris, Sales Executive, attended the interview in person.

The meeting was facilitated by a representative of HRHeaven QA Sample Employer's HR team and observed by Saira Khan, Marketing Manager, in relation to follow-up actions concerning active sales leads and feedback consolidation.

 MEETING NOTES 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. DISCUSSION SUMMARY

Ethan provided constructive feedback regarding his role as a Sales Executive. He expressed that the position involved a significant administrative burden which he felt impacted his ability to focus on core sales activities.

He highlighted the absence of formal proposal templates, which he believed led to inefficiencies in preparing client proposals.

Ethan noted inconsistencies with the CRM processes, making tracking and managing client interactions more challenging.

On a positive note, he praised the team culture as supportive and collaborative, contributing positively to his working experience.

However, Ethan flagged concerns about commission tracking, indicating a lack of clarity around how commissions were recorded and calculated, which caused some frustration.

He also mentioned that line-manager HR record-keeping appeared sparse, potentially affecting performance discussions and development planning.

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4. **AGREED ACTIONS**

Saira Khan, Marketing Manager, verbally agreed during the meeting to compile the exit interview notes into a summary report for presentation to the board.

She also agreed to oversee the reassignment of Ethan’s active sales leads to other team members to ensure continuity.

No formal owner has been designated in HR files for these follow-up actions; it is recommended that ownership be clearly recorded to aid accountability and tracking.

It is advised that HR reviews the observations regarding administrative processes, CRM usage, commission tracking, and HR record-keeping to identify potential improvements.

5. **SIGNATURES**

Employee: Ethan Morris Date: 21 November 2025

HR Representative: Date: 21 November 2025

Line Manager / Observer (Saira Khan): Date: 21 November 2025