

Human Resources Ready-to-Use Templates

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Job Description (JD) Template

A well-crafted job description is the foundation of every successful hire. It defines the responsibilities, qualifications, and expectations for a specific role – aligning hiring managers, candidates, and HR teams around a shared understanding. Use the structure below as your standardized starting point and customize per role.

Role Identification

Job Title: [Insert Job Title]

Department: [Insert Department Name]

Reporting To: [Insert Reporting Manager Title]

Job Location: [Insert Location]

Employment Type:

- Full-Time
- Part-Time
- Contract
- Remote / Hybrid

Job Summary

Provide a brief overview of the role and its importance within the organization. Keep this section concise – 3 to 5 sentences that describe what the role does, who it serves, and why it matters.

Example: "The HR Executive will support recruitment, onboarding, employee engagement, and HR operations while ensuring compliance with company policies."

Key Responsibilities

- Responsibility 1
- Responsibility 2
- Responsibility 3
- Responsibility 4
- Responsibility 5

Job Description: Qualifications, Skills & KPIs

The second half of a strong job description outlines what the ideal candidate brings to the role and how success will be measured. Clear qualifications reduce misaligned applications, while defined KPIs ensure both managers and employees understand performance expectations from day one.

Required Qualifications

- Bachelor's degree in relevant field
- Relevant certifications (if applicable)
- Required technical knowledge

Required Skills

- Communication skills
- Problem-solving skills
- Time management
- Team collaboration
- HR software knowledge

Experience Required

[Insert required years of experience]

Key Performance Indicators

- Time to Fill
- Employee Satisfaction
- Recruitment Targets
- Compliance Accuracy

Prepared By	Approved By	Date
[Name & Title]	[Name & Title]	[DD/MM/YYYY]

Structured Interview Scorecard Template

Inconsistent evaluations are one of the leading causes of poor hiring decisions. The Structured Interview Scorecard standardizes how each candidate is assessed – ensuring every interviewer uses the same criteria, ratings, and documentation format. This promotes objectivity, reduces bias, and creates a defensible record of the selection process.

Candidate Information

Field	Details
Candidate Name	[Insert Name]
Position Applied For	[Insert Role]
Interview Date	[DD/MM/YYYY]
Interviewer Name	[Insert Name]

Rating Scale

Rating	Meaning
1	Poor
2	Average
3	Good
4	Very Good
5	Excellent

Evaluation Criteria

Competency	Rating (1–5)	Comments
Communication Skills		
Technical Knowledge		
Problem-Solving Ability		
Teamwork & Collaboration		
Cultural Fit		
Leadership Potential		
Adaptability		
Overall Confidence		

Interview Scorecard: Final Recommendation

The final recommendation section brings all evaluation scores together into a clear hiring decision. Interviewers should complete this section independently before any panel debrief to reduce groupthink and anchoring bias. Additional notes allow interviewers to document qualitative impressions that numbers alone may not capture.

<p>Strongly Recommend</p> <p>Candidate exceeds expectations across most or all competencies. Move to offer stage promptly.</p>	<p>Recommend</p> <p>Candidate meets core requirements. Proceed to next stage or reference checks.</p>
<p>Hold</p> <p>Candidate shows potential but has gaps. Consider a second interview or alternative role.</p>	<p>Not Recommended</p> <p>Candidate does not meet minimum requirements. Document reasons clearly before declining.</p>

- Additional Notes:** [Insert interviewer observations – include any standout strengths, concerns about fit, or specific examples cited by the candidate during the interview.]

Employee Onboarding Checklist

A structured onboarding process significantly impacts new hire retention, time-to-productivity, and overall employee experience. This checklist ensures every onboarding touchpoint – from pre-joining logistics to the end of the first month – is completed systematically. Assign clear ownership for each task to prevent items from falling through the cracks.

1

Pre-Joining Activities

- Offer Letter Sent
- Documents Collected
- Background Verification Completed
- IT Equipment Prepared
- Workspace Assigned

2

Day 1 Activities

- Welcome Session Conducted
- ID Card Issued
- HR Policies Explained
- Team Introduction Completed
- System Access Provided

3

First Week Activities

- Role Training Completed
- Goal Setting Discussion
- Department Orientation
- Compliance Training
- Manager Check-In

4

First Month Activities

- Performance Feedback Session
- Employee Engagement Discussion
- Probation Review Initiated

Employee Details	Field	Information
Employee Name	Employee ID	[Insert]
Department	Joining Date	[Insert]
Reporting Manager		[Insert]

Performance Review Template

Regular, structured performance reviews are essential for developing talent, aligning expectations, and building a culture of accountability. This template enables managers and HR teams to evaluate employees fairly and consistently across all departments. Use the form below on a quarterly, semi-annual, or annual basis as defined by your organization's review cycle.

Employee Information

Employee Name [Insert]

Employee ID [Insert]

Department [Insert]

Review Period [Insert]

Reporting Manager [Insert]

Key Achievements

- Achievement 1
- Achievement 2
- Achievement 3

Areas for Improvement

- Improvement Area 1
- Improvement Area 2

Performance Evaluation

Performance Area	Rating (1–5)	Comments
Quality of Work		
Productivity		
Communication		
Teamwork		
Problem-Solving		
Initiative		
Attendance & Reliability		
Goal Achievement		

Employee Development Plan

- Training Recommendation
- Coaching Requirement
- Career Development Goals

Performance Review: Ratings, Comments & Signatures

The final section of the performance review captures the overall rating, mutual commentary, and formal acknowledgment from all parties. Both employee and manager comments are equally important – they ensure the review is a two-way conversation rather than a top-down assessment. All signatures confirm that the review was conducted and acknowledged formally.

Overall Performance Rating

[Insert Final Rating – e.g., Exceptional / Meets Expectations / Needs Improvement]

Summarize the employee's overall performance during the review period in 2–3 sentences, referencing specific achievements or patterns noted above.

Employee Comments

[Insert employee's perspective on their own performance, challenges faced, and goals for the coming period.]

Manager Comments

[Insert manager's observations, guidance, and forward-looking expectations for the employee.]

Employee Signature

[Signature / Date]

Manager Signature

[Signature / Date]

HR Signature

[Signature / Date]



Ensure all three signatures are obtained before filing. Unsigned performance reviews are not considered complete records and may not be audit-ready.

Employee Disciplinary Procedure Guide

A fair and consistent disciplinary process is critical for maintaining workplace standards and protecting the organization legally. This template provides a structured, step-by-step procedure for handling employee misconduct professionally – from initial identification through to potential termination. Each step must be documented thoroughly. HR should be involved at every stage to ensure procedural compliance and impartiality.



Each stage of the disciplinary process builds on the previous one. Early intervention through clear communication often resolves issues before they escalate. Maintain confidentiality throughout and ensure the employee is informed of their rights at every step.

1 Identify the Issue

Examples include attendance violations, policy breaches, misconduct, harassment, or poor performance. Document the initial observation with dates and witnesses where applicable.

2 Conduct Preliminary Investigation

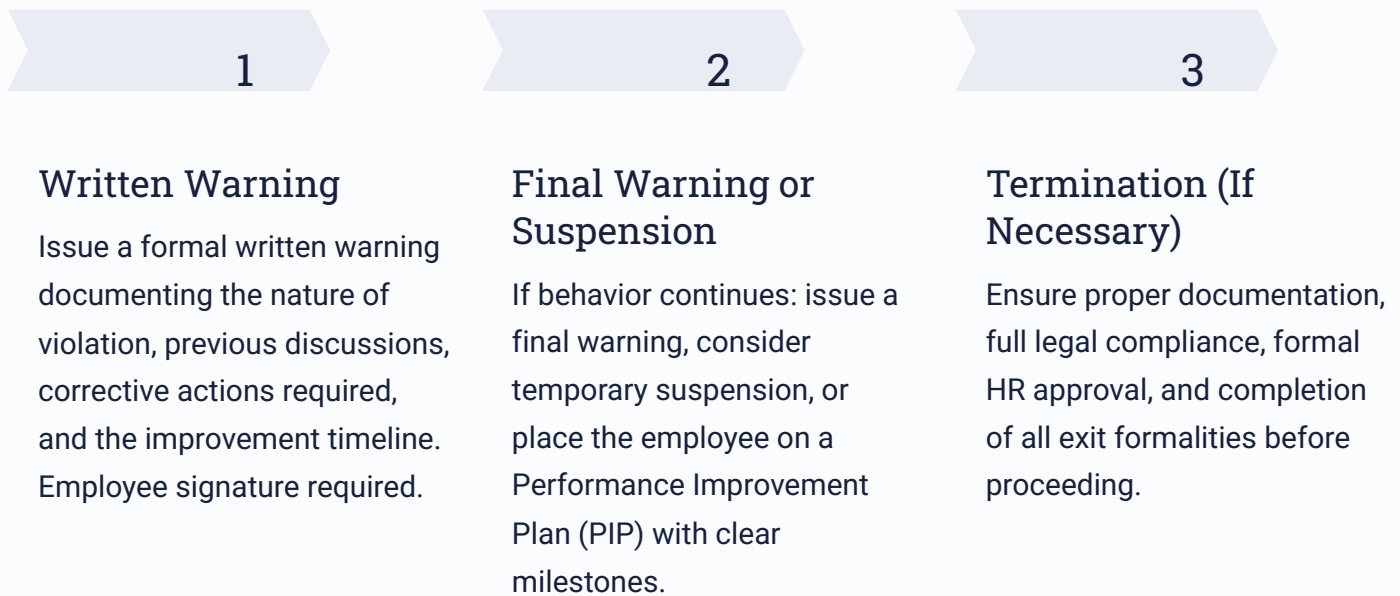
Gather facts, review evidence, speak with all involved parties, and maintain strict confidentiality. Do not prejudge outcomes before the investigation is complete.

3 Issue Verbal Warning

Document the nature of the issue, expected improvement, and timeline for correction. The employee should acknowledge the discussion in writing.

Disciplinary Procedure: Written Warning to Termination

If verbal intervention does not resolve the issue, the process escalates through formal written documentation. Each escalation step must be clearly communicated to the employee, with sufficient time provided for improvement before further action is taken. Termination should always be a last resort, undertaken only after all prior steps have been exhausted and documented.



Field	Details
Employee Name	[Insert Name]
Date	[DD/MM/YYYY]
Nature of Violation	[Describe clearly]
Previous Discussions	[Summarize prior verbal/written warnings]
Corrective Actions Required	[List specific expectations]
Improvement Timeline	[Insert deadline]

Exit Interview Template

Exit interviews are one of the most underutilized tools in the HR toolkit. When conducted properly, they reveal honest insights into workplace culture, management effectiveness, and systemic issues that engagement surveys often miss. Use this template to ensure every departing employee provides structured, comparable feedback that can be tracked over time and used to drive meaningful retention improvements.

Employee Name	[Insert]
Department	[Insert]
Designation	[Insert]
Last Working Day	[DD/MM/YYYY]
Interview Conducted By	[HR Representative Name]

Q1. What is the primary reason for leaving?

[Open response – do not prompt with options to avoid leading the employee. Capture verbatim where possible.]

Q2. How would you describe your overall experience with the company?

[Open response – note tone, key themes, and specific departments or managers mentioned.]

Q3. Were your job responsibilities clearly defined?

[Open response – clarity of role expectations often predicts performance and satisfaction.]

Q4. How would you rate internal communication?

Excellent Good Average Poor

Q5. Did you feel supported by your manager?

Yes No Partially

Q6. What did you like most about working here?

[Positive feedback is equally valuable – identifies strengths to preserve and promote.]

Exit Interview: Final Questions & Comments

The closing questions of the exit interview gather forward-looking feedback and assess potential rehire candidacy. Employees are often more candid at this stage of the conversation, making these responses particularly valuable for identifying structural or cultural patterns. Always close the interview on a positive, respectful note – alumni can become future candidates, clients, or brand advocates.

Q7. What improvements would you recommend?

[Capture specific, actionable suggestions related to processes, management, culture, compensation, or career development opportunities.]

Q8. Would you consider rejoining the organization in the future?

Yes No Maybe

[If "Maybe" or "No," explore reasons further. Rehire intent is a strong indicator of overall sentiment toward the organization.]

Final Comments: [Capture any additional thoughts the employee wishes to share. Treat this as unfiltered feedback – even uncomfortable responses provide valuable data for HR and leadership.]

- ✔ Aggregate exit interview data quarterly and share anonymized trends with senior leadership to inform retention strategy and culture initiatives.

HR KPI Tracker Template

Data-driven HR decisions begin with consistent, reliable tracking of key performance indicators. This KPI dashboard provides HR teams with a standardized framework for measuring and reporting workforce health metrics. Track results monthly, compare against targets, and use status indicators to flag areas requiring immediate attention. Present this data in leadership reviews to demonstrate HR's strategic impact.

KPI	Formula	Monthly Target	Current Result	Status
Time to Fill	Days to close position	[Target]	[Result]	🟢 / 🔴
Cost per Hire	Recruitment Cost ÷ Hires	[Target]	[Result]	🟢 / 🔴
Attrition Rate	Employees Left ÷ Avg Employees × 100	[Target]	[Result]	🟢 / 🔴
Retention Rate	Employees Retained ÷ Total × 100	[Target]	[Result]	🟢 / 🔴
Engagement Score	Survey Results	[Target]	[Result]	🟢 / 🔴
Training Completion Rate	Completed ÷ Assigned Trainings	[Target]	[Result]	🟢 / 🔴
Absenteeism Rate	Absent Days ÷ Workdays	[Target]	[Result]	🟢 / 🔴
Offer Acceptance Rate	Accepted Offers ÷ Total Offers	[Target]	[Result]	🟢 / 🔴
Revenue per Employee	Revenue ÷ Total Employees	[Target]	[Result]	🟢 / 🔴

📘 Use color-coded status indicators (🟢 On Track / 🟡 At Risk / 🔴 Off Track) to make this dashboard scannable for leadership presentations. Review and update targets quarterly.

Employee Warning Letter Template

A formal warning letter serves as the official written record of a disciplinary action. It must be clear, factual, and free from emotional language. Used correctly, it protects both the organization and the employee by documenting expectations and consequences in unambiguous terms. Always issue warning letters after verbal warnings have failed to produce the desired change, and retain copies in the employee's HR file.

Subject: Formal Warning Notice

Dear [Employee Name],

This letter serves as a formal warning regarding the following issue:

[Describe the issue clearly and factually – include dates, incidents, and policy references where applicable.]

Despite previous discussions on [date of verbal warning], the issue continues to affect workplace standards and expectations. This behavior is in violation of [Company Policy Section / Code of Conduct].

You are expected to:

- Improve performance or conduct immediately
- Follow all company policies and procedures
- Maintain professional workplace behavior at all times

Failure to demonstrate sustained improvement by [specific deadline] may result in further disciplinary action, up to and including termination of employment.

You are encouraged to discuss this matter with HR if you have any questions or wish to share your perspective.

Regards,

[Manager / HR Name]

[Title]

[Date]

⊗ Warning letters must be reviewed by HR and legal counsel before issuance in cases involving potential discrimination, harassment, or whistleblower-protected activity.

Training Needs Analysis (TNA) Template

A Training Needs Analysis bridges the gap between current employee capabilities and the skills required to meet business objectives. Rather than deploying generic training programs, the TNA ensures learning investments are targeted, relevant, and aligned to both individual development plans and organizational strategy. Conduct TNAs at least annually – or after significant business changes such as restructuring, new technology adoption, or shifting strategic priorities.

TNA Form

Employee Name	Department	Skill Gap Identified	Priority Level
[Name]	[Dept]	[Gap]	High / Medium / Low
[Name]	[Dept]	[Gap]	High / Medium / Low
[Name]	[Dept]	[Gap]	High / Medium / Low

Add required training column to link each identified gap to a specific learning intervention – whether internal, external, e-learning, or on-the-job coaching.

Sources for Identifying Training Needs



Performance Reviews

Low ratings on specific competencies signal clear skill gaps.



Manager Feedback

Direct managers identify real-time operational gaps.



Employee Surveys

Employees self-report learning needs and career aspirations.



Business Goals

Strategic direction dictates required future capabilities.

Employee Engagement Survey Template

Employee engagement surveys provide organizations with a direct, quantifiable measure of how employees feel about their work, their managers, and the company overall. The data gathered drives decisions about culture, benefits, management training, and workplace improvements. Administer surveys semi-annually at minimum, ensure anonymity to maximize honesty, and – critically – communicate results and action plans back to employees. Surveys without visible follow-through erode trust over time.

Statement	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
I feel valued at work	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication is effective in this organization	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I have growth and development opportunities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My manager supports my professional development	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I would recommend this company as a great place to work	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Open Question 1: What do you enjoy most about working here?

[Open text response – captures positive drivers of engagement and elements to preserve in culture and policy.]

Open Question 2: What improvements would you suggest?

[Open text response – surfaces actionable insights directly from the workforce. Categorize responses by theme for trend analysis.]

HR Monthly Reporting Template

Monthly HR reports translate raw workforce data into strategic insights for senior leadership. A well-structured HR report enables executives to see trends in headcount, recruitment velocity, employee relations, and learning outcomes – all in a single, standardized format. Consistency in reporting structure allows month-over-month comparisons that reveal patterns invisible in one-off snapshots. Present this report at monthly leadership or board meetings.

Workforce Summary

Metric	Current	Previous
Total Headcount	[#]	[#]
New Hires	[#]	[#]
Exits	[#]	[#]
Open Positions	[#]	[#]
Attrition Rate	[%]	[%]

Recruitment Summary

- **Positions Filled:** [Insert number]
- **Average Time to Fill:** [Insert days]
- **Hiring Challenges:** [Describe key obstacles encountered this month]

Employee Relations

- **Grievances Reported:** [#]
- **Resolved Cases:** [#]
- **Engagement Activities Conducted:** [List]

Learning & Development

- **Trainings Conducted:** [#]
- **Employees Trained:** [#]
- **Training Hours Completed:** [#]

Include a brief narrative on the most impactful training delivered this month, and highlight any upcoming programs scheduled for the next reporting period.

HR Action Plan Template & Best Practices

The HR Action Plan transforms strategic intent into executable initiatives. Use this template to document objectives, assign clear ownership, set realistic deadlines, and track progress on key HR programs throughout the year. Pair this with your monthly HR report to give leadership full visibility into what HR is working on and how it's progressing.

	Objective	Action Item	Owner	Deadline	Status
	Improve Engagement	Conduct quarterly pulse surveys	HR Team	[Date]	In Progress
	Reduce Attrition	Revamp onboarding experience	HRBP	[Date]	Planned
	Increase Training Completion	Launch LMS campaigns	L&D Team	[Date]	Planned

Best Practices for Using HR Templates



Customize for Context

Adapt every template to reflect your organization's specific policies, culture, and terminology before deploying them.



Standardize Across Departments

Consistent formats reduce errors, enable benchmarking, and ensure equitable treatment across all functions and levels.



Maintain Confidentiality

All HR documents must be stored securely with access limited to authorized personnel only.



Review Periodically

Templates should be reviewed at least annually to remain aligned with evolving labor laws, company policies, and best practices.

Recommended HR Toolkit Usage Guide

Each template in this toolkit is designed for a specific HR function and audience. Use this reference guide to ensure the right template reaches the right team. When building department-specific HR playbooks, select and bundle templates by role to create focused, purpose-built resource packs for each team.

Template	Best Used By	Primary Purpose
Job Description Template	Recruiters & HR Managers	Define role expectations
Interview Scorecard	Talent Acquisition Teams	Standardize candidate evaluation
Onboarding Checklist	HR Operations	Structured new hire integration
Performance Review Form	Managers & HRBPs	Fair, consistent performance evaluation
Disciplinary Procedure Guide	HR Managers & Legal	Compliant misconduct handling
Exit Interview Form	HR Generalists	Capture retention insights
KPI Tracker	HR Leadership	Strategic workforce reporting
Warning Letter Template	HR Managers & Business Partners	Formal disciplinary documentation
Training Needs Analysis	L&D Teams & HRBPs	Targeted skills development
Engagement Survey	Employee Experience Teams	Measure workforce satisfaction
Monthly HR Report	HR Directors & CHROs	Executive-level workforce insights
HR Action Plan	All HR Professionals	Initiative tracking & accountability

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