## **EMPLOYEE OFFBOARDING**

## **CHECKLIST TEMPLATE**

## THANK EMPLOYEE

Thank the employee in person, ensuring interaction is genuine.

Provide information about any available resources to departing employees

Let them know the 'open-door policy'

## **COMMUNICATE THE DEPARTURE**

Communicate the departure as soon as possible to all relevant departments.

Include gratitude for the departing employee's service.

Ensure the employees' team, managers, subordinates, payroll, and IT are informed.

Let customers know if relevant.

If the senior manager is departing, consider public announcement.

R

## FACILITATE KNOWLEDGE TRANSFER

Ensure you have a detailed document of the departing employee, including:

A comprehensive overview of their daily tasks.

Clarity on task priorities.

Access rights to all systems and files they utilize.

A list of individuals they collaborate with, both within and outside the organization.

Ask the departing employee to create a document or video explaining role for incoming employee.



Request the departing employee to return company equipment on their final day (empty spaces left for you to add extra apps), including:

Company badges or lanyards.

Credit cards.

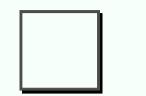
Uniforms.

Phones, tablets, or laptops.

Company car.

# DISABLE SYSTEM ACCESS

Disable system access for the following applications and others if relevant (empty spaces left for you to add extra apps):

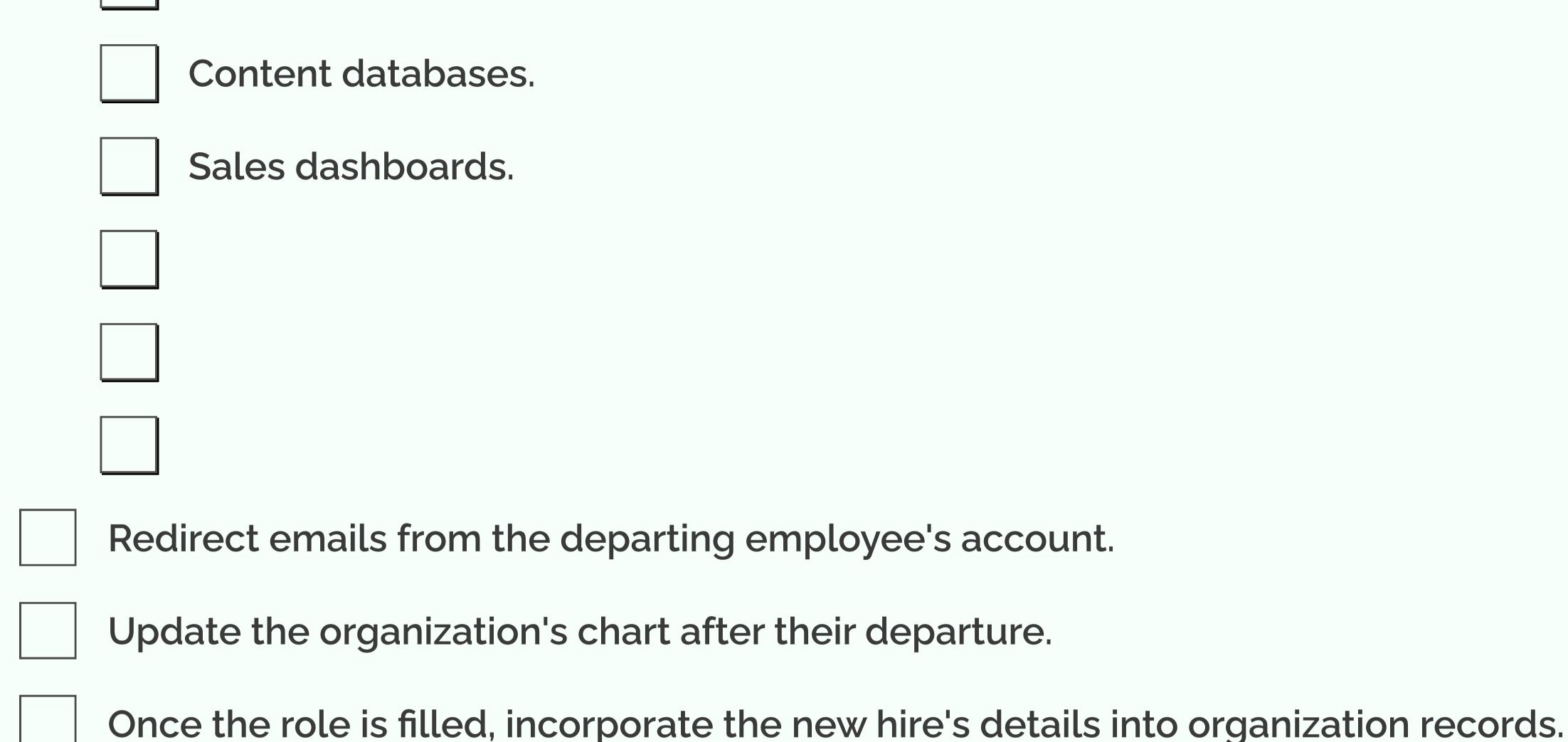


Intranet solutions.



Social media accounts.

CRM tools.



\_ Once the role is filled, incorporate the new nire's detail



Ensure HR is present.

Use exit interview to collect employee feedback on their experiences in their former organization.

Include the following questions in the exit interview:





How could we enhance the work experience here?

Is there anything we could have done differently to retain you?

Share your thoughts on your relationship with your manager.

What qualities should we prioritize in your successor?

What aspects are we neglecting that could contribute to a more positive organizational culture?

Would you recommend our company to job seekers in your network?

Be open to all feedback and record all comments, do not justify or excuse practices the former employee feels are inadequate.

# UPDATE ORGANIZATIONAL RECORDS

Promptly update organizational records and directories.



**MANAGE CONCLUDING PAYMENTS AND BENEFITS** 

Pay former employee final paycheck.

Remove former employee from payroll in consultation with the Payroll department and provide them with the following information in advance to avoid delay:

Employee's end date.

Notice period.

Potential holiday payouts.



Stay in touch with employees by sending them the latest company news and vacancies via one of the following:

Alumni group.

Talent pool.

Consider software such as Aluminati and EnterpriseAlumni to implement contact with former employees.

## **ISSUE REFERENCE LETTERS AND DEPARTURE DOCUMENTATION**

Issue any documents the former employee may need, such as final pay details, reference letters, requested contracts, and/or service certificates.

#### WWW.DIGITAL-ADOPTION.COM