

EMPLOYEE OFFBOARDING

CHECKLIST TEMPLATE

01

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'

02

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.

03

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.

04

RECLAIM COMPANY ASSETS

- 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.
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05

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.
 - Email platforms.
 - Social media accounts.
 - CRM tools.
 - Content databases.
 - Sales dashboards.
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- Redirect emails from the departing employee's account.
- Update the organization's chart after their departure.
- Once the role is filled, incorporate the new hire's details into organization records.

06

CONDUCT EXIT INTERVIEW

- 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:
 - What influenced your decision to leave?
 - 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.

07

UPDATE ORGANIZATIONAL RECORDS

- Promptly update organizational records and directories.
- Add successor's details to organizational records if relevant.

08

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.

09

MAINTAIN CONTACT

- 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.

10

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.