

# **Stakeholder Coordination Plan**

**Task ID: 86a7m1ne8**

**Objective:** Identify and document the roles of HR, IT, Finance, and Legal teams in the offboarding process to ensure seamless execution

## **Executive Summary**

This Stakeholder Coordination Plan outlines the collaborative responsibilities of four key internal departments—Human Resources (HR), Information Technology (IT), Finance, and Legal—in the employee offboarding process. Proper coordination among these teams ensures regulatory compliance, operational continuity, data protection, and a professional employee exit experience. This document serves as a roadmap for creating a structured offboarding flow that is both efficient and accountable across all departments involved.

# Human Resources (HR)

## Primary Role:

HR is the lead coordinator of the offboarding process. They initiate the workflow, ensure compliance with internal policies and employment laws, and manage the emotional and informational aspects of the exit.

## Key Responsibilities:

- **Initiate Exit Checklist:** Triggered by resignation, termination, or retirement notice.
- **Record Management:** Archive resignation letters, termination documents, and personnel files.
- **Benefits & Payroll Notification:** Communicate with Finance about last pay, benefits cessation, and ROE.
- **Exit Interview:** Gather feedback to improve employee retention and workplace culture.
- **Clear Communication:** Notify relevant departments of exit timeline and access shutdown.

## Example:

If an employee resigns with two weeks' notice, HR must immediately schedule an exit interview, notify IT and Finance, and confirm the final working date.

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# Information Technology (IT)

## Primary Role:

IT ensures the secure handling of all digital and physical tech assets, prevents data leaks, and maintains system integrity post-departure.

## Key Responsibilities:

- **Revoke Access:** Disable logins for email, VPN, Slack, shared drives, etc
- **Recover Equipment:** Collect laptops, phones, ID badges, or revoke access if not returned
- **Backup Files:** Archive project files and emails for knowledge transfer.
- **Monitor Security Logs:** Audit user activity to flag any abnormal behavior during notice period
- **Secure Cloud Tools:** Remove user access from tools like Google Workspace, Microsoft 365, GitHub, or internal CMS systems
- **Document Tech Offboarding:** Log all completed tasks to ensure audit-readiness

## Example:

An employee working in the software engineering team gives one month's notice. IT immediately removes their GitHub commit access, disables VPN within 24 hours, and schedules a time to retrieve their laptop. The employee's local drive is backed up, and all project documentation is handed off to another developer via Confluence. The IT manager saves an audit record of these actions.

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# Finance

## Primary Role:

Finance finalizes compensation, processes outstanding financial obligations, and ensures clean tax documentation.

## Key Responsibilities:

- **Calculate Final Pay:**
  - Salary up to last day worked
  - Unused vacation days
  - Severance pay (if applicable)
- **Deduct Dues:**
  - Corporate credit card charges
  - Equipment costs if not returned
- **Generate Tax Forms:**
  - T4 (Canada)
  - Update CRA/Service Canada records
- **Close Payroll Accounts:**
  - Stop contributions to pensions, benefits, etc.

## Example Calculation:

Final Pay = (Remaining Salary) + (Unused Vacation) + (Bonus/Severance) – (Outstanding Deductions)

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# Legal

## Primary Role:

Legal ensures the company is shielded from risk by validating the offboarding process complies with employment laws, contracts, and internal regulations.

## Key Responsibilities:

- **Review Termination Documents:** Ensure non-disclosure and non-compete agreements are clear and signed
- **Ensure Legal Compliance:** Adhere to local regulations like ESA and PIPED
- **Dispute Handling:** Assist in exit cases involving legal claims or potential litigation
- **Enforce Data Retention:** Work with IT and HR to archive or destroy data per policy

## High-Risk Scenario Example:

If an employee was dismissed without notice, Legal must ensure that severance is handled correctly to avoid wrongful dismissal lawsuits.

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# Recommendations for EMS

To improve offboarding using EMS (Exit Management System):

- **Automate Checklists:** Use tools like ClickUp or Notion to assign and track tasks
  - **Create Role-Based Dashboards:** Let HR, IT, Finance, and Legal view their tasks and deadlines
  - **Schedule Sync Meetings:** Weekly or as needed during offboarding periods
  - **Enable Documentation Upload:** Upload signed forms and audit logs directly into EMS
  - **Conduct Monthly Compliance Audits:** Ensure policies are consistently followed
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## Appendix: Sample Offboarding Checklist

Task	Owner	Status
Notify All Departments	HR	<input checked="" type="checkbox"/>
Disable System Access	IT	<input checked="" type="checkbox"/>
Collect Company Devices	IT	<input checked="" type="checkbox"/>
Final Pay Calculation	Finance	<input type="checkbox"/>
Legal Compliance Check	Legal	<input type="checkbox"/>
Conduct Exit Interview	HR	<input type="checkbox"/>

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