**Offboarding Checklist:**

|  |  |
| --- | --- |
| **First Name** |  |
| **Last Name** |  |
| **Office** |  |
| **Employee ID** |  |
| **Date** |  |

**Managing the termination process**

|  |  |  |  |
| --- | --- | --- | --- |
|  | Task | Time Frame | Person Responsible |
|  | **Document the termination/resignation**  If the employee resigned from their current  position, have them write a formal letter of  resignation. If the employee was dismissed,  ensure that a formal letter of termination has  been filed. |  |  |
|  | **Schedule an exit interview**  Schedule an appointment with the employee  before they leave the company to get feedback  about their experience at the company, their role,  and (If they resigned) the reasons for their  departure. The exit interview is one of the last  formal interactions the employee will have with  the company, so it is important to be well  prepared for the exit interview. |  |  |
|  | **Inform the team**  Inform the team about the imminent departure of  the employee, and be aware of your teams  needs. Keep an open line of communication to  ensure that your team feels supported and can  look positively into the future. |  |  |
|  | **Customer communication**  If the employee had direct customer contact,  make a plan to inform the customers and to  arrange a handover (who will take over the  customers, what information and resources will  be needed, etc.). |  |  |
|  | **The exit interview process**  Plan the structure of the exit interview: When is  the interview? How long should it last? Who will  take part? What information do you need? What  information does the former employee need? |  |  |

**Preparing the formalities**

|  |  |  |  |
| --- | --- | --- | --- |
|  | Task | Time Frame | Person Responsible |
|  | **Prepare the severance, tax and benefits**  **documents**  As soon as you know that an employee is set to  leave the company, make sure to go over any tax  and severance documents with the relevant  departments (such as accounting and legal) to  ensure that everything is in order.   * Review outstanding employee   reimbursements   * Confirm that there aren’t any outstanding   paid leave days or other pending benefits   * Prepare any required tax and social   security documents that the employee is  entitled to/needs after leaving the  company. |  |  |

**The handover**

|  |  |  |  |
| --- | --- | --- | --- |
|  | Task | Time Frame | Person Responsible |
|  | **Determine who will take over after the employee**  Who will take over the role of the old employee?  Will the work be divided among several people? |  |  |
|  | **Assess training needs/requirements**  Once you know who will be taking the role, you  will need to find out if and what training is  required. Will the leaving employee train their  successor? Are there skill gaps that need to be  addressed? Does an upskilling process make  sense? |  |  |
|  | **Prepare all information, files and documents for**  **the handover**  Have the employee compile any information or  files that their successor and/or manger needs  access to, such as passwords, account lists,  customer information, processes, etc. |  |  |
|  | **Create a to-do list for the last projects and tasks**  Together with the employee, think about how  they want to complete their current projects. For  which tasks or milestones are they responsible for  before they leave? Make sure that you (or the  supervisor) follow up so that there are no open  projects. |  |  |

**Return Company Property**

|  |  |  |  |
| --- | --- | --- | --- |
|  | Task | Time Frame | Person Responsible |
|  | **Return all company property**  All equipment provided by the company must be  returned before the employee leaves. These items  may include:   * ID cards * Laptops * Cell phones * Uniforms * Keys * Parking tickets * Company credit cards |  |  |
|  | **Remove personal items**  The employee should their desk or locker of any  personal items that they brought into the office. |  |  |
|  | **Organize documents, files and/or training**  **materials**  The employee should gather and organize any  and all information and documents that they will  pass on to their successor. They should clearly  label the files so that any information can be  easily identified and found. |  |  |

**Deactivating Accounts**

|  |  |  |  |
| --- | --- | --- | --- |
|  | Task | Time Frame | Person Responsible |
|  | Revoke access to email accounts, internal  platforms and other systems. |  |  |
|  | Change all passwords for all company accounts  to which the employee had access to. |  |  |
|  | Notify all relevant teams and contact points  about the employee departure. |  |  |
|  | Redirect emails and phone calls to the new  employee. |  |  |
|  | Update the company org chart. |  |  |
|  | Remove the employee for all internal calendars,  meetings and staff pages. |  |  |

**Complete the Offboarding**

|  |  |  |  |
| --- | --- | --- | --- |
|  | Task | Time Frame | Person Responsible |
|  | Write a thank you note. |  |  |
|  | Give a personal goodbye gift |  |  |
|  | Pass around a farewell card in the office for all  colleagues to sign. |  |  |
|  | Host a farewell lunch or dinner |  |  |