**Exit Interview Questionnaire & Offboarding Checklist**

Prepared For: [Enter your client name here]

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# How to Use This Template

This **Exit Interview & Offboarding Template** is designed to provide businesses with a structured and professional approach to employee departures. Employers should:

* Conduct exit interviews professionally to gather meaningful feedback for workplace improvement.
* Use the questionnaire to identify trends in employee turnover and address concerns proactively.
* Ensure compliance with labor laws and company policies regarding employee resignations or terminations.
* Follow the offboarding checklist to manage administrative, security, and legal obligations.
* Customize this document to fit specific business operations, industry requirements, and company culture.

# Introduction & Purpose

A structured **exit interview and offboarding process** is essential for:

* Understanding employee experiences to refine retention strategies.
* Gathering honest feedback on workplace conditions, leadership, and company culture.
* Ensuring a smooth transition by protecting company knowledge, assets, and systems.
* Maintaining a positive professional relationship with departing employees and fostering potential future engagement.
* Ensuring compliance with employment regulations and industry best practices.

This template provides both an **Exit Interview Questionnaire** and an **Offboarding Checklist** to guide HR teams and managers through an efficient and professional exit process.

# Exit Interview Questionnaire

## Employee Information

* **Employee Name:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* **Job Title:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* **Department:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* **Manager/Supervisor:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* **Last Working Day:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* **Review Date:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Reason for Leaving (Check One):

☐ Voluntary Resignation

☐ Retirement

☐ Layoff

☐ Termination

☐ Other (please specify): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

# Exit Interview Questions

1. **What led to your decision to leave the company?**
2. **What aspects of your job were most satisfying?**
3. **What aspects of your job were most challenging?**
4. **How would you describe the company culture and work environment?**
5. **Were your responsibilities clearly defined and manageable?**
6. **Did you receive adequate training and resources to perform your job?**
7. **How effective was management in supporting your role?**
8. **Did you feel valued and recognized for your contributions?**
9. **Were there any workplace policies, ethics, or compliance concerns you experienced?**
10. **What recommendations do you have for improving employee retention?**
11. **Would you consider returning to work for the company in the future?**

☐ Yes ☐ No ☐ Maybe

Please explain: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

## Employee Feedback & Final Comments

**Employee Signature:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Date:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**HR Representative Signature:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Date:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

# Offboarding Checklist

## A. Administrative & Payroll Tasks

* Confirm last working day and document resignation letter.
* Process final paycheck, including outstanding wages, bonuses, and accrued vacation.
* Update payroll, tax, and benefits records.
* Provide COBRA or continued benefits details (if applicable).
* Confirm return of company property (laptops, mobile phones, ID badges, keys, etc.).
* Deactivate access to email, databases, and company accounts.
* Process outstanding expense reimbursements.
* Update HR records with exit interview feedback**.**

## B. Knowledge Transfer & Transition Management

* Assign a transition contact person to oversee knowledge handover.
* Document and reassign pending projects or client accounts.
* Ensure proper handover of critical job responsibilities.
* Communicate departure to relevant teams and clients as needed.

## C. Security & Compliance

* Ensure all access credentials (email, VPN, software, security badges, etc.) are deactivated.
* Retrieve confidential company documents and proprietary materials.
* Conduct an exit security review for compliance risks.
* Remind employees of confidentiality, data security, and non-compete agreements (if applicable).
* Provide legal or compliance guidance related to the offboarding process.

## D. Employee Experience & Alumni Engagement

* Acknowledge employee contributions with a formal farewell message.
* Offer networking opportunities within alumni groups (if applicable).
* Provide references or letters of recommendation (if appropriate).
* Encourage participation in future professional collaborations or return opportunities.

**HR Representative Signature:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Date:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Manager Signature:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Date:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

# Final Provisions & Acknowledgment

This Exit Interview and Offboarding Checklist applies to all **departing employees** of **[Company Name]**. Employees and HR personnel must acknowledge their understanding and adherence to the exit process.

**Employee Signature:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Date:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**HR Representative Signature:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Date:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

# Disclaimer:

*This template is a general guide and should not be considered legal or HR advice. While ProSupport HR Partners has ensured its accuracy, employment laws and offboarding regulations may change over time. Employers should consult a qualified* ***HR professional or legal expert*** *to tailor this document to their specific business needs and ensure full compliance.*

*By using this document, the employer assumes full responsibility for its implementation and legal consequences. ProSupport HR Partners disclaims any liability arising from its use, modification, or interpretation. This template serves as a structured framework for best HR offboarding practices and compliance with employment regulations.*

**Please delete the last page once you are done.**

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