STRATEGIC EMPLOYEE OFFBOARDING ROADMAP—THE BIG WINS OF A POSITIVE GOODBYE

UPON NOTICE

- Obtain & accept resignation letter (unless involuntary)
- Enter employee departure date in HR system to trigger offboarding checklist and alerts to key departments
- Provide employee with link and instructions for offboarding checklist
- Provide employee with link and instructions for formal knowledge transfer
- Confirm employee appointment with benefits team
- Begin processing any outstanding expense reports, petty cash or other expenses
- Begin processing of paid time off and/or leave balances
- Begin processing any required return of signing bonus or moving/relo reimbursement

2 WEEKS IN ADVANCE OF DEPARTURE DATE

- Remove personal information from company-owned devices
- Schedule final manager/team lunch/happy hour with departing employee
- Identify and transfer files, documents, emails, department app log-ins & other records to supervisor
- Collaborate with employee on knowledge transfer list of current project status, internal & external contacts and other key information
- Notify team and appropriate stakeholders of employee departure
- Employee meeting to review relevant departure policy (NDAs, non-competes)
- Employee meeting with HR team to discuss benefits, paid time off balances, retirement plans and employment verification process

WITHIN LAST FEW DAYS OF DEPARTURE DATE

- Meet with key departments to ensure return of company-owned property
- Return all keys, IDs, credit cards, calling cards, permits and other company property
- Return all phones, computing devices and media
- Provide reliable contact information (home address, phone, email address) for future correspondence (especially for payroll and W-2)
- Settle any cash advances, petty cash accounts, fines and reimbursements
- Move I-9 and personnel files from active to inactive
- Conduct exit interviews for feedback either through online survey or in-person meeting

ON LAST DAY

- Ask employee to sign agreement confirming removal of company data from personal services and devices
- Forward email/voicemail to supervisor
- Meet with key contact to ensure completion of knowledge transfer
- Meet with IT to review scope of employee electronic footprint and property transfer completion
- Remove all personal items from workspace
- Review checklist in offboarding system with employee, verify all tasks completed
- Remind employee to sign up for alumni group

AFTER DEPARTURE

- Reminder to send follow-up termination information (COBRA, etc.) to employee
- Notify partners (outplacement, benefits/COBRA administration, etc. of employee departure)
- Dispose/repurpose laptop and cell phone
- Verify cancellation of system, building and security card access
- Cancel memberships (industry), licenses, contracts (cell phone)
- Remove from recurring meeting schedules; update org charts, company contacts, mailbox, nameplate
- Ensure continued employee access to payroll and W2 information
- Review of employee feedback given at exit interview for continuous improvement

SilkRoad

Employees leave for all kinds of reasons. And your employer brand goes with them. So make the most of an exit experience. When employees leave, they take all of their experience and knowledge with them. A good exit process will capture that knowledge, ensure compliance with your exit policies, collect feedback on the organization and reinforce the best parts of your employer brand.

An intentional strategic offboarding program puts a quality closing experience onto an employee's tenure. It creates a warm, consistent experience can strengthen your employer brand, help you stay in touch with top talent and maintain a positive "buzz" about your company.

Ignoring offboarding can be a risky, shortsighted approach in today's highly connected world. And, who knows? They'll share experiences on Glassdoor and other social platforms. Departing employees now have power and today's leading edge companies are asking, "How can we create a win-win departure?" A great employee who departs today can return as a rehire – or even as a future customer!

Ready to get started?

Use this handy checklist to get your offboarding program rolling. You can also automate the program by using the checklist, workflow and alert functionality in your onboarding software.

Offboarding Best Practice Goals

- Collect valuable feedback
- Maintain and promote company reputation as an employer of choice
- Provide employee with an organized way to wrap-up and transfer projects
- Assist in the transfer of knowledge
- Protect physical property and maintain an operating knowledge base
- Ensure compliance and security regarding systems and physical access