

Off-boarding Checklist for HR Managers



Your employee is
ready to embark
on a new work
adventure.

Here's your guide
to give them a
proper goodbye.

Did you know that the amount of attention companies give to employees leaving the company is just 1/8th of what they invest in onboarding?

That's a significant oversight, as an effective off-boarding experience is just as important as onboarding (check out our blog on onboarding [here](#)) to ensure a positive and lasting impression on your departing employees. That's why we've developed an off-boarding checklist that can help you create a structured and memorable experience for your departing employees.

By providing your employees with a positive and well-structured offboarding experience, you can transform them into brand ambassadors, even after they have left the company.

This offboarding checklist is designed for HR managers to help them establish a comprehensive process for offboarding an employee. However, depending on the structure of your company, certain tasks, such as organizing a goodbye party, may be delegated to the employee's line manager.

To simplify the off-boarding process, we've broken it down into four phases:

1. Practical information
2. Open communication
3. Handover
4. The goodbye

Practical Information

Inform the team about employee's departure (from inner to outer circle)

- ☐ Inform the direct colleagues
- ☐ Inform colleagues from other departments
- ☐ Inform clients (if applicable) and hand them over to another(new) colleague

Employee succession planning

- ☐ Employee's replacement is arranged internally
- ☐ Vacancy has been put online for the opened position

Create a financial overview for the departing employee containing:

- | | |
|--|---|
| <input type="checkbox"/> Employee's final salary | <input type="checkbox"/> Final payslip |
| <input type="checkbox"/> Remaining vacation days | <input type="checkbox"/> Annual statement |
| <input type="checkbox"/> End of year bonus | <input type="checkbox"/> Pension overview |

Make sure all company property are handed in on the last working day, such as:

- ☐ Laptop, phone and other electronic accessories
- ☐ Access passes
- ☐ Confidential documents
- ☐ Lease car and keys
- ☐ Secondary benefits cards (transportation, gym, etc)

Open Communication

Plan an Exit Interview with the departing employee

- ☐ Plan in a meeting for the exit interview 2 weeks before employee's last working day
- ☐ Inform employee on what topics they can expect
- ☐ Inform employee what will be done with their feedback

Have an Exit interview with with the departing employee to get feedback on:

- ☐ The company
- ☐ The cooperation with the managers and colleagues
- ☐ The employee's function and growth within the company

Tip:

The goal of the Exit interview is to obtain valuable feedback from a departing employee about their experiences within the company and the reasons for the departure. It is also an opportunity for the employer to identify and resolve any issues or areas for improvement within the business. [Click here](#) to learn everything you need to know about Exit interviews, including questions to ask and how to prepare.

Handover

Hold a knowledge transfer meeting with the departing employee during their last week

- ☐ Get information about all ongoing projects and their status
- ☐ Get all important documents, files and correspondence from departing employee
- ☐ Get all account access information from departing employee
- ☐ Create a detailed handover document containing all of the above information

The Goodbye

- ☐ Organize a goodbye lunch/party/drinks, according to the departing employee's preference
- ☐ Thank the departing employee for their work and contribution to the company
- ☐ Stay in touch through social media or company's networking channel

Employee's feedback implementation:

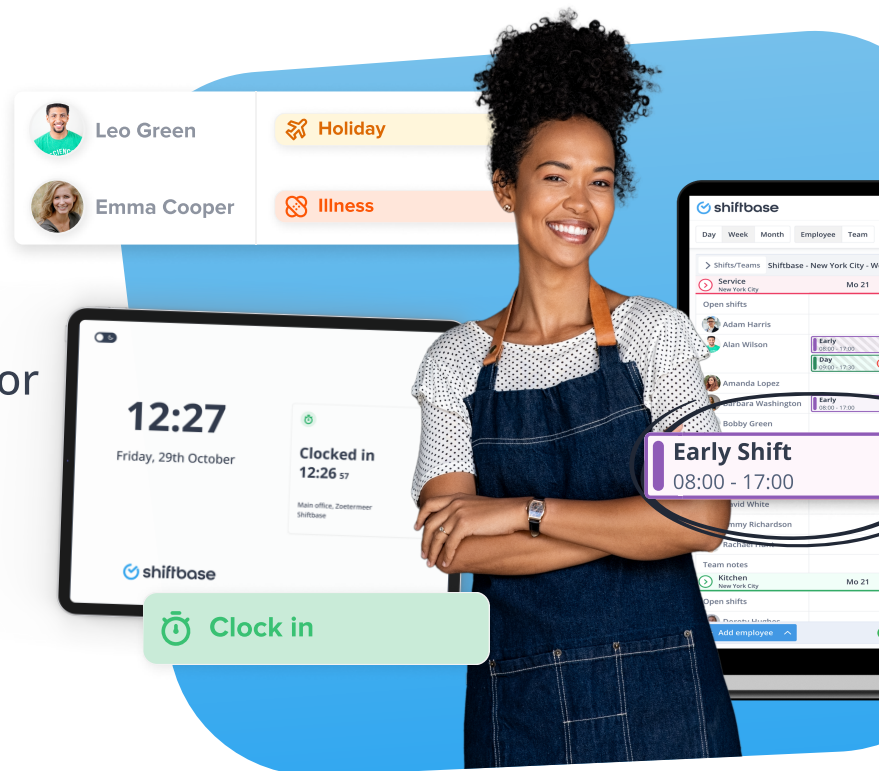
- ☐ Review the provided feedback from the employee during the Exit interview
- ☐ Take action based on the feedback provided by departed employee and make improvements within the company

Tip:

Make sure the goodbye is a memorable one! Surprise the departing employee with a small gift or 'goodbye package' including a note with goodbye wishes from their colleagues.

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