



# LAYOFF AND CAREER TRANSITION PLANNING GUIDE

Planning and implementing a successful workforce reshaping requires completing a list of detailed tasks and following a pre-determined trajectory to finally reach a satisfactory conclusion for employees and for your business. We've assembled this project planner to help you keep track of all the tasks, big and small, and to distribute tasks amongst those in the organization responsible for their completion.

## PLANNING PHASE



ACTION ITEM	COMPLETION DATE	PERSON RESPONSIBLE
Establish a business case for your reduction in force and review it with your legal counsel.		
Identify a spokesperson to interact with media and handle public relations.		
Determine approximate number of employees and/or positions to be eliminated. <ul style="list-style-type: none"> <li>› What percentage of the total workforce is impacted?</li> <li>› What is the actual number?</li> <li>› Which locations are affected?</li> </ul>		
Establish action plan and timeline for the entire event. <ul style="list-style-type: none"> <li>› On what date will notifications take place?</li> <li>› Will some employees need to be retained longer than others?</li> <li>› If yes, which positions will be retained and for how long?</li> <li>› What retention tools/strategies will be used?</li> </ul>		
Establish selection criteria and rationalize your criteria against applicable laws. Some criteria examples include: <ul style="list-style-type: none"> <li>› Skills vs. business needs</li> <li>› Job elimination</li> <li>› Job redundancy</li> </ul> For more information regarding EEOC, visit <a href="http://www.eeoc.gov">www.eeoc.gov</a>		
Determine benefit/severance package for employees: <ul style="list-style-type: none"> <li>› Pay in lieu of notice?</li> <li>› Severance pay?</li> <li>› Medical and dental continuation until (date)?</li> <li>› EAP program – are there additional visits for employee/family?</li> <li>› Outstanding 401K loan payoff?</li> <li>› Accrued but unused vacation to be paid?</li> <li>› Redeployment possible?</li> <li>› Which career transition packages will be offered to which employees?</li> </ul>		
Select career transition packages and provide payment method.		
Conduct first review meeting of reduction in force (RIF) list and timetable with executives and legal counsel.		
Work with your legal department to establish administrative processes for workforce reduction. Tasks to consider include: <ul style="list-style-type: none"> <li>› How will computers/phones/other materials be collected from each individual?</li> <li>› When/how do you inform Payroll?</li> <li>› How will you track benefits and outplacement?</li> </ul>		

# PLANNING PHASE



ACTION ITEM	COMPLETION DATE	PERSON RESPONSIBLE
Contact legal counsel and review list for potential negative impact and high-risk situations.		
Conduct review meeting of the RIF list and timetable with executives and legal counsel. (You should be closer to developing the final list than at the first meeting.) Determine any follow-ups for executives – are there managers who need to turn in lists? If lists are not final yet, what is the barrier?		
Create an exit packet. Examples of packet contents: <ul style="list-style-type: none"> <li>› Formal separation letter outlining benefits/severance</li> <li>› Outplacement / career transition information</li> <li>› EAP benefits</li> <li>› 401K forms</li> <li>› Unemployment insurance/social security materials</li> </ul>		
Contact EAP Program to inform them of the workforce reduction and discuss any additional benefits they can provide to employees and families.		
Identify rooms in building(s) to be used for individual notification meetings.		
Establish communication strategy and timetable: <ul style="list-style-type: none"> <li>› Executive team</li> <li>› Managers</li> <li>› Memo to all employees to go out immediately following event</li> </ul>		
Develop talking points to be used by managers when conducting notification meetings.		
Schedule manager notification training.		
Develop schedule for RIF meetings.		
Decide on a date and time for an all-hands meeting, and include details in the memo to retained employees.		
Schedule resiliency training for remaining employees.		
Schedule appointments for impacted employees to meet after (date) with management or HR for final notification.		
Meet with Security/Facilities to identify/resolve security issues and to discuss presence on day of notification.		
Provide Payroll with list of affected employees.		
Conduct final meeting with executives for review of impacted employee list: <ul style="list-style-type: none"> <li>› Create final employee list</li> <li>› Assign outplacement packages to specific employees</li> </ul>		
Assemble individual notification/exit packets for employees.		
Conduct manager notification training.		
Review and finalize schedule of notification meetings.		

## IMPLEMENTATION PHASE



ACTION ITEM	COMPLETION DATE	PERSON RESPONSIBLE
Initiate any security procedures to prevent high risk situations.		
Distribute memo explaining event to all employees.		
Conduct employee notification meetings. <ul style="list-style-type: none"> <li>› Manager/HR conducts each notification meeting</li> <li>› Manager explains reasons for position elimination and how employee is being affected</li> <li>› HR Rep explains benefits/severance package and outplacement assistance</li> <li>› Inform employee that outplacement representative will be in contact within 24 hours</li> </ul>		
Conduct notification meetings for anyone not onsite on notification date.		
Notify temporary agencies about affected temporary and contract employees.		
Conduct meeting for all remaining employees.		
Conduct one-on-one meetings to reassure remaining employees.		
Begin resiliency workshops.		
Ensure Payroll arranges for benefit continuation through determined date.		
Send out COBRA packages to impacted employees.		
Complete final administrative paperwork.		

When you're planning a compassionate layoff, RiseSmart is here to help you, and your employees, every step of the way.

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