



# The Employee Offboarding Process Essential Best Practices

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Most employee offboarding procedures are the same for any company. From resignation to termination, our checklists and suggestions provide valuable insight.

# The Employee Offboarding Process, Simplified

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An employee has turned in their resignation...so, what does this mean for your organization? Turnover is a natural part of any organization's life cycle, and employee offboarding should be handled with the same degree of importance as [new employee onboarding](#) for a few reasons. It is important to have a good employee offboarding plan to communicate and manage the change, to help preserve and improve your employer brand, and to generate good faith with the departing employee.

There are a lot of moving pieces involved with a termed employee, and clear offboarding procedures help manage the expectations of all parties involved. Some human resources software offerings even include [offboarding tools](#) that help facilitate the offboarding workflow and make sure task items are disseminated to the proper stakeholders.

We have outlined basic procedures below, which can also be found in our downloadable offboarding checklist.



# Communicate the Termination

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Groups who will likely need to be made aware of the resignation include:

**Greater HR Team:**

for purposes of initiating and managing the offboarding workflow

**IT:**

for purposes of company asset recollection (key card, laptop, company credit card, etc.), and termination of systems access (work email, platforms and tools, etc.)

**Finance:**

for purposes of processing the final paycheck

**Manager:**

for purposes of managing change communication to the team and ensuring a knowledge transfer plan is in place

**Recruiting:**

for purposes of evaluating and initiating a recruiting need for the backfill

**Leadership Team:**

for purposes of transparency

# Provide Information to the Employee

The employee will need to know essential information such as an overview of the offboarding process, timeline, and what is expected of them.

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Often times this information will be summarized for the employee and handed to them in an employee offboarding checklist. At the very minimum, the following should be covered:

- Final paycheck details
- Benefit continuation beyond their employment (ie. COBRA)
- 401K
- Exit interview process
- Returning company-owned equipment
- And don't forget to mention any relevant state-mandated paperwork or procedures

Additional information that may be covered:

- Exercising vested equity
- Signing a non-compete agreement
- Repayment of incurred reimbursable expenses

# Develop a Transition Plan

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Establishing a knowledge transfer between the departing employee and the relevant manager or team members is critical to avoid losing vital information, access to documentation, or access to vendors or customers.

- Schedule time between the departing employee and their manager to map out and transfer important role knowledge and current projects
- Ensure all customers and/or vendors have been transitioned to a current team member as the new POC
- Ensure that access to important documents or platforms has been transitioned to a current team member

# Conduct Exit Interview

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Exit interviews are quite possibly one of the most genuine and pure forms of feedback a company can solicit from its employees. If you are not conducting interviews for your departing employees, you are missing out on a wealth of both positive and constructive feedback that your organization could be using to help itself improve.

- Schedule a time for HR to meet with the departing employee
- Prior to the exit interview, have the employee complete their feedback in an Exit Survey to capture the main points and to help prep HR for the exit interview



# Collect Company Assets & Terminate Systems Access

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Forgetting this part of the offboarding procedures could result in compromising your systems.

- Terminate work email and all systems/tools access
- Collect company-owned assets (laptop, keyboard, etc.)
- Mark the termination in relevant HR systems (HRMS, payroll, benefits, etc.)



# Generate Good Faith

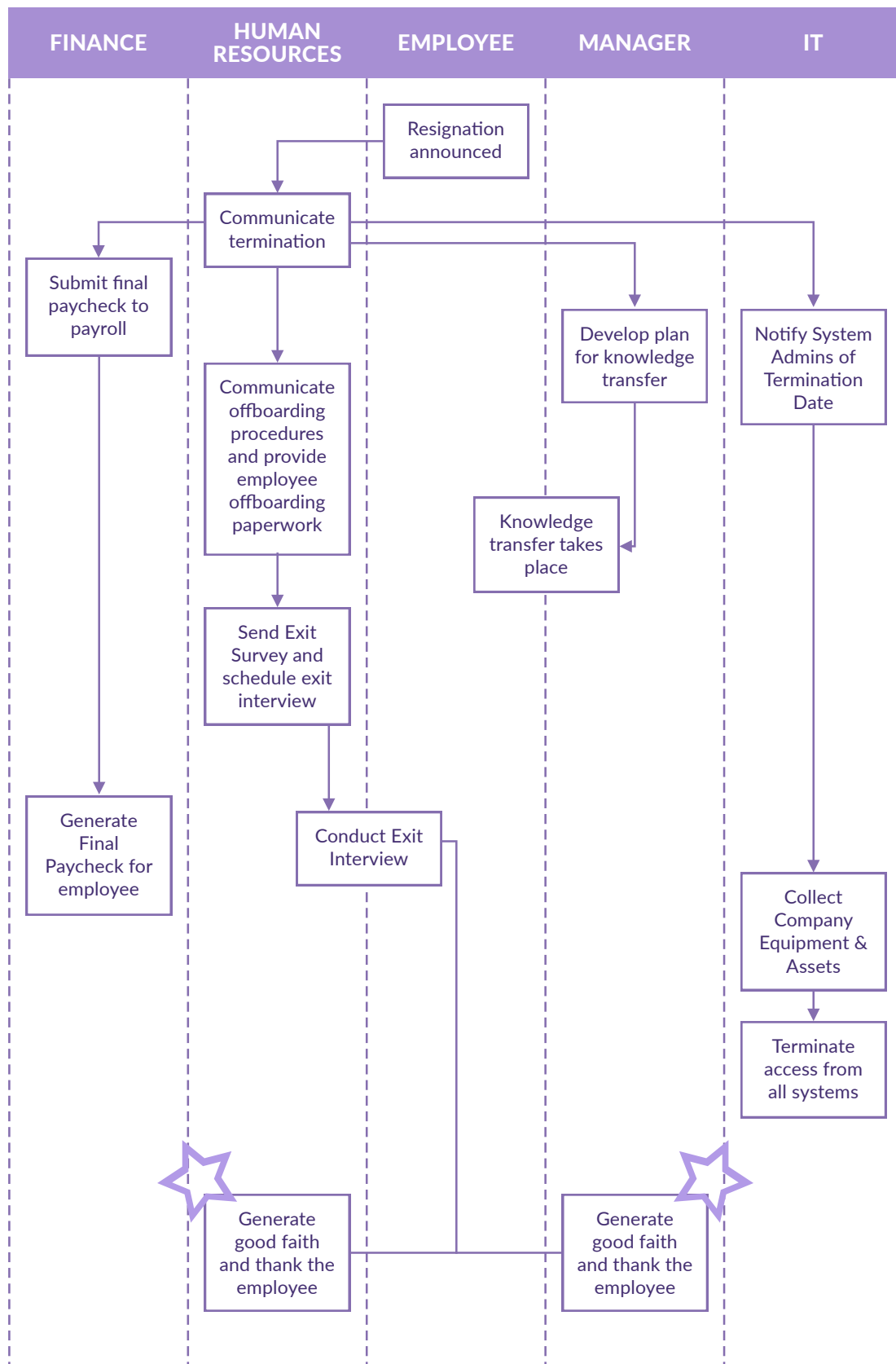
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Lastly, remember to thank the employee for their commitment and contributions to the company. This generates good faith later down the line and shows the company's appreciation for the work and time the employee contributed during their tenure.

It might seem surprising, but a seamless [offboarding process](#) helps contribute to your employer brand, and a healthy employer brand is crucial for any business. This last step wraps up the end of an employee's experience, so knowing how to offboard an employee compassionately helps leave a final, positive mark on a company. Ex-employees are brand ambassadors for your company, and it is important to generate good faith with the departing employee because the sentiment they leave with can affect both the company's image, and also the company's access to a network of referrals for potential customers or talent later down the line.

Offboarding is just as important to HR processes as onboarding. With task notifications, [customizable HR workflows](#) and asset management, HR Cloud automates the entire process so the transition will be smooth. To learn more about how we can help improve your employee transition process, book a demo with an HR Process Consultant [here](#).









# Offboarding Checklist

## COMMUNICATE THE TERMINATION

Greater HR Team  
IT  
Finance

Manager  
Recruiting Team  
Leadership Team

## PROVIDE INFORMATION TO EMPLOYEE

Final paycheck details  
COBRA  
401K

Exit interview process  
Returning Company assets  
Misc. paperwork

## DEVELOP A TRANSITION PLAN

Schedule time for employee and manager to conduct knowledge transfer  
Transfer customer/vendor accounts/current projects  
Ensure access to critical documents are transferred to an active member of the team

## EXIT INTERVIEW

Schedule and conduct exit interview  
Have employee complete feedback in an exit Exit Survey

## COLLECT COMPANY ASSETS & TERMINATE SYSTEMS ACCESS

Terminate work email and all systems/tools access  
Collect company owned assets (laptop, key card, ect. )  
Mark the termination in relevant HR systems (HRIS, benefits, etc.)

## GENERATE GOOD FAITH

Thank the employee for their contributions and efforts  
Ensure the employee receives their final paycheck on time and has a smooth last day



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## Unleashing Human Resourcefulness

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For more information visit [hrcloud.com](http://hrcloud.com) or contact [Info@hrcloud.com](mailto:Info@hrcloud.com).

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