

# Employee Offboarding Checklist

1

## Understand the Reason for the Exit

- ✓ Gather information on the employee's reason for leaving (e.g., resignation, retirement, termination).
- ✓ Tailor offboarding process based on the circumstances.

2

## Complete Necessary Paperwork

- ✓ Ensure all required employment termination forms are filled out.
- ✓ Provide necessary documentation regarding benefits and nondisclosure agreements.

3

## Hold an Exit Interview

- ✓ Schedule and conduct an exit interview with the departing employee.
- ✓ Prepare a set of specific questions to gather feedback and insights.

4

## Secure Company Property

- ✓ Retrieve company-issued resources like laptops, mobile devices, access badges, and keys.
- ✓ Remind the departing employee to remove personal data from company devices and accounts.

5

## Maintain Communication

- ✓ Keep the departing employee informed about ongoing projects and responsibilities.
- ✓ Offer support and assistance for a smooth handover process.

6

## Facilitate Knowledge Transfer

- ✓ Arrange documentation or training for the employee's replacement or team members handling their tasks.
- ✓ Encourage departing employees to share insights & best practices before they leave.

7

## Preserve Positive Relationships

- ✓ Express gratitude for the departing employee's contributions.
- ✓ Wish them well in their future endeavors and maintain positive communication.

## Additional Considerations:

- ✓ Mitigate legal risks by ensuring clear understanding of confidentiality obligations.
- ✓ Identify immediate successors or redistribute workload for ongoing projects.
- ✓ Communicate transparently with remaining team members to maintain morale and address emotional challenges.

