

# Offboarding Best Practices: Customizable Checklist

Offboarding Main Task	Specific Actions	Responsibility For Completion	Date Completed
<b>Payroll &amp; Paperwork</b>	Process resignation letter or termination notice		
	Notify payroll of last day of employment		
	Tie up any loose ends in payroll, e.g., outstanding leave, severance package, unpaid commission		
	Prepare non-disclosure or non-compete agreements if appropriate		
	Prepare benefits documents, including healthcare benefits, retirement plans		
	Notify the team, wider organization, and any external contacts of employee's departure		
	Update organizational charts		
	Set up interim cover arrangements		
<b>Knowledge Transfer</b>	Issue final paycheck		
	Create a list of main tasks with step-by-step instructions if needed		
	Identify list of internal or external contacts employee works with		
	Outgoing staffer prepares status updates on current or future projects with priority tasks identified		
	Arrange for current employee to train colleagues in any systems or processes involved in the job		
<b>Exit Interview</b>	If possible, arrange for a handover to the new replacement		
	Arrange exit interview to be led by HR or neutral manager if possible		
	Ask about areas company could improve		
	Discuss employee's views on resources and support while in the job		
<b>Company Assets</b>	Record the feedback and share any crucial insights with management and HR		
	Recover company assets, including: <ul style="list-style-type: none"> <li>○ ID badges</li> <li>○ Company credit cards</li> <li>○ Laptops</li> <li>○ Mobiles</li> <li>○ Uniforms</li> <li>○ Company car</li> <li>○ Parking permits</li> <li>○ Keys</li> </ul>		
<b>Reset Systems Access</b>	Ensure departing worker clears their workstation of personal items		
	Remove access to company email		
	Delete user accounts on other enterprise apps or internal systems, including: <ul style="list-style-type: none"> <li>○ Intranet</li> <li>○ CRM</li> <li>○ Social media</li> <li>○ Company databases</li> </ul>		
	Change passwords on any shared access workflows, databases, or apps, e.g., DropBox		
<b>Say Thank You</b>	Redirect emails or phone calls to a new contact		
	Provide reference letter or certificate of service		
	Write a thank-you note		
	Get colleagues to sign a farewell card		
	Throw a leaving do or have a shared lunch to farewell the colleague		