

# Employee Offboarding Checklist



## Phase One: Prepare paperwork

- Resignation letter
- Outstanding reimbursements
- Taxation and benefits documents
- Contracts and NDAs

## Phase One: Plan Exit interviews

- Prepare for the interview
- Schedule the interview
- Notify all the people involved

## Phase One: Notify important people

- Talk to team members
- Inform clients (if the employee was client-facing)

## Phase Two: Knowledge transfer

- Determine who will take over the responsibilities (for the interim)
- Connect the departing employee with the substitute
- Identify training needs of the substitute employee
- Share necessary information/documents/files for handoff
- Create a to-do list for final tasks

# Employee Offboarding Checklist



## Phase Three: Recover company assets

- Work equipment
- ID cards
- Uniforms (where required)
- Company mobile phone
- Keys
- Parking permits
- Corporate credit cards

## Phase Three: IT permissions and access

- Get information on ID and passwords to important files/accounts/documents

## Phase Three: Promptly reset accounts

- Update passwords
- Redirect calls and emails
- Update directory and organizational chart

## Phase Four: Farewell

- Send a thank-you note
- Arrange a farewell
- Give a personalized gift
- Offer positive performance review
- Ask for feedback