

EMPLOYEE NAME: _____

POSITION: _____ LAST DAY: _____

- Begin the offboarding process as soon as you learn about an employee's departure.
- Tactfully inform the entire team that an employee is leaving to prevent inter-office gossip.
- Schedule an exit interview date.
- Prepare important paperwork and legal documents (Ex. tax documents, 401K information, etc.)
- Ask for a list of important business contacts that may be needed after they leave.
- Request a status report for ongoing projects and outstanding tasks.
- Complete the employee exit interview to retrieve insight and feedback.
- Arrange for the return of all company assets, including technology, keys, and passes.
- Create redirects for emails and calls.
- Update the company website and social media accounts as necessary.
- Ensure all account passwords are reset upon the employee's departure.
- Clearly define your offboarding and exit interview policy, so it can be replicated by all business teams.
- Continue to evolve your onboarding process as you gather additional feedback and learn what information is most important to gather.