



OFFBOARDING ESSENTIALS

Facilitate departure from your organization
with minimum negative impact

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Introduction

We hear a lot about onboarding and how important it is in terms of cultural fit, productivity, and retention. But what about offboarding? While onboarding is about building the foundation for a strong and lasting relationship, offboarding is the structure for how people depart your organization with minimum negative impact to all involved. No matter how positive the experience during their tenure, the departure sets the tone for how you will be remembered.

The specific steps to take as an employee exits vary depending on whether it is a resignation, layoff, or involuntary termination, but the main objectives remain the same:

- ✓ Keep the fallout from the departure to a minimum.
- ✓ Shape critical last impressions an employee has of the company and how they will portray you to the outside world.
- ✓ Gather information to help the organization improve hiring and the employee experience.

7 Steps for Effective Offboarding

1. Facilitate communication and knowledge transfer.

- ✓ Communicate the departure to the remaining staff.
- ✓ Firing announcements should never be made via casual text or messenger. One-on-one conversations with each employee is preferred, but in larger organizations this can be handled appropriately with a well-crafted letter distributed via email or at a group meeting. The reasoning should be factual, not emotional.
- ✓ If a layoff, provide remaining staff with reassurance that they are valued and that their jobs are safe.
- ✓ Create a plan for handing off projects and responsibilities and determine who is best suited to take over activities and/or accounts.
- ✓ Schedule any training that needs to take place for a smooth transfer.

2. Process termination paperwork with payroll and benefits.

- ✓ Determine if the employee is eligible for severance pay and extended benefits.
- ✓ Inform payroll and benefits administrators of the termination date.
- ✓ Make arrangements for payout of any unused PTO.

3. Conduct an exit interview.

- ✓ Identify the reasons people are leaving and use that information to make changes.
- ✓ Because the reason people leave is often because of their manager, have a neutral person conduct the interview. This could be an HR representative, a supervisor from a different department, or even an outside resource like one of your advisors or consultants.
- ✓ See the appendix for specific exit interview questions.

4. Update your organizational charts and conduct a needs analysis.

- ✓ Take the opportunity to evaluate the reporting structure and the specifics of the now vacant position. Is it working? Is this position still necessary?
- ✓ Who in the organization may be capable of stepping up into the vacant position?
- ✓ If a search needs to be conducted, how might the position be changed to meet the needs of the company and the team?

5. Recover company assets and revoke system access.

- ✓ Access the systems and files they use and change passwords.
- ✓ Take possession of keys and revoke security access.
- ✓ Have them hand over company equipment: cell phone, computer, uniforms, company credit cards, badges, etc.

6. MOST IMPORTANT: Thank the employee for their contributions!

- ✓ If voluntary, congratulate them and recognize them for their contributions. Give them a sendoff that makes them feel valued and appreciated.
- ✓ If an involuntary exit, provide constructive feedback to help them be more successful in the future. Remember that every person you let go is a human being with a career and connections. You want them to be a brand ambassador for your company.
- ✓ Now is not the time for anger or pouting. Be a good sport and acknowledge the effort they invested during their time with your company.

7. Stay in touch.

- ✓ If a voluntary departure, keep the relationship going.
- ✓ Keeping the lines of communication open fosters potential for referrals, testimonials, or even future re-engagement.

Ready to fill that vacancy? Need help with interviewing and onboarding?

Download STM's [Interviewing Guide](#) and [Onboarding Essentials](#).

Exit Interview Template

- ✓ What prompted you to begin looking for a new opportunity?
Why did you choose the one that you did?
- ✓ Did the job live up to your expectations?
- ✓ How do you feel the job has changed since you were hired?
- ✓ Do you feel you were given the tools and resources you needed to succeed? If not, what was missing?
- ✓ What did you like most about our company and your job?
- ✓ How could we improve the employee experience?
- ✓ Are there any individuals you feel were particularly helpful to you? Harmful?
- ✓ How was your relationship with your manager?
- ✓ Do you feel your achievements were recognized during your time with the company?
- ✓ Is there anything we could have done to change your mind about leaving?
- ✓ Would you recommend our company to job-seeking friends?



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