The offboarding checklist

- How to say goodbye to employees

Modern organizations prioritize onboarding, yet offboarding often goes overlooked. Ensuring a smooth departure is crucial for both the employee and the business. To achieve a positive offboarding, begin by ticking off this checklist!

The fact that an employee quits, retires or is dismissed can affect your organization in different ways, depending on how important the role is. It can, for example, disrupt the workflow, affect team morale or lead to knowledge gaps. In addition, it means extra costs to find and train replacements, while the remaining employees get more to do.

To manage these challenges and ensure that the transition between old and new employees goes smoothly, structured offboarding is needed. Proper termination also helps create a positive work culture and preserve your organization's reputation.

Look at offboarding as an investment in your organization's future growth.

Here are 15 must-haves for a successful offboarding!

1 **Make offboarding a priority**

It's common knowledge that welcoming new employees is crucial. However, did you know that a positive farewell when someone leaves your organization can also be beneficial?

2 **Identify the importance of the role**

Some roles are more difficult to fill than others. Carefully evaluate the impact the departing employee has on your organization.

3 **Establish guidelines**

To effectively handle the challenges of departing employees, you should have clear guidelines that are easy to follow. Look at offboarding as an investment in your organization's future growth. People will leave sooner or later, and a well-established process makes you better prepared.

4 **Explain the process**

Ensure the departing employee understands the entire offboarding process, including the return of company property.

5 **Expect consequences**

The fact that an employee quits can lead to everything from disruptions in the workflow to declining work morale and costs for recruitment and training. Try to work proactively so that the consequences are not too great.

6 **Share knowledge continuously**

Continuity in knowledge transfer and succession planning is crucial – not only when someone leaves, but also for the day-to-day operations in general. When learning becomes a natural part of your organization, competence is secured going forward.

7 **Collect documentation**

Ensure that the departing employee documents their responsibilities, projects and contacts to avoid knowledge gaps. Collect everything in one place. In a learning platform, you can build up playbooks for different departments and make sure that the employee who is leaving documents everything in them.

8 **Be transparent**

Enter an open dialogue with the departing employee to exchange honest feedback. It ensures a professional finish and helps your organization become even better.

13 Protect sensitive information

Secure system and device permissions to prevent data breaches.

14 Follow standard termination directives

Use a standardized termination process and exit procedures to ensure everything goes smoothly. A continued good relationship in the event of termination is not always possible, but that only makes a correct process even more important.

9 Conduct exit interviews

Always interview departing employees to gather valuable feedback on the organization, policies, and work environment. This helps in creating long-term benefits when someone leaves.

15 Learn from the process

Continually evaluate and improve the offboarding process to meet changes and needs in your organization.

10 Maintain a professional relationship

Always strive to maintain positive relationships for possible re-employment, business partnerships and client referrals. Sometimes former employees can become brand ambassadors for your organization.

11 Stay in touch

The relationship after an employment has ended can also be nurtured through social media, networks or meeting.

12 Prioritize compliance and security

Ensure that you comply with local labor laws and that administrative tasks such as termination agreements are completed correctly and on time.

Do you want to streamline your offboarding?

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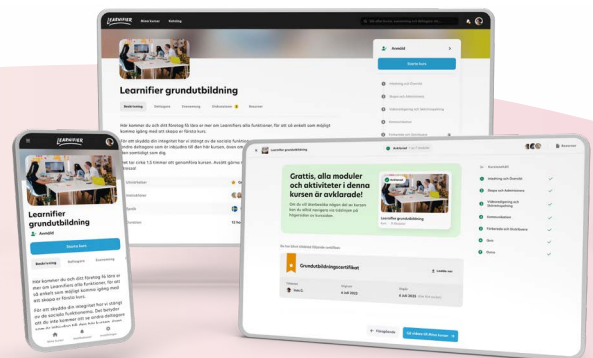
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