

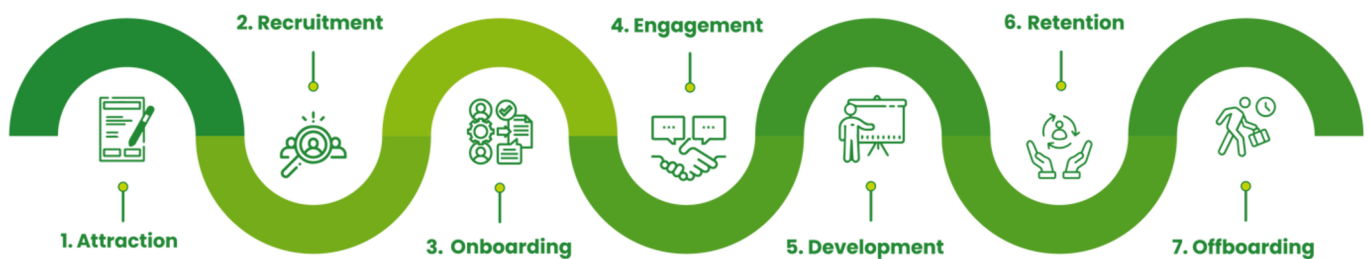


# The ultimate HR guide to **offboarding employees**



In the world of HR, we use a framework called the 'Employee Life Cycle' to help us to understand and manage every stage of an employee's journey, from attracting the best people to come and work for your company to ensuring a smooth exit when they move on.

Here's what the Employee Life Cycle looks like:



In this guide, we'll discuss offboarding, an important step in the Employee Life Cycle that businesses often overlook.

## Where are business owners going wrong with offboarding?



### Lack of a formal offboarding process, including exit interviews

Many businesses handle offboarding inconsistently or without clear procedures, resulting in chaotic or incomplete transitions.

Skipping exit interviews, or not taking them seriously, means losing valuable insights into workplace issues or opportunities for improvement.

Employees leaving may have key feedback about the culture, leadership or processes, but this feedback is often ignored.

## Inadequate knowledge transfer

Employers fail to ensure that critical information is passed on to colleagues or successors, creating operational challenges. Without proper documentation or handovers, important workflows can stall or break.



## Ignoring the impact on teams

The departure of a team member can disrupt morale and workflow, but businesses often fail to address this proactively.

Team members may feel overburdened or anxious if roles aren't backfilled or responsibilities aren't redistributed thoughtfully.

## Failing to protect sensitive data

Not revoking access to systems, tools and sensitive information in a timely manner increases the risk of data breaches. Poor asset retrieval processes (e.g., laptops and ID cards) can result in losses.



## Neglecting compliance

Mishandling final pay, benefits or legal obligations during offboarding can lead to compliance issues or disputes. Inconsistent handling of offboarding can also expose businesses to claims of unfair treatment.

# What are the risks of not having a good offboarding process?

- Damage to employer brand
- Loss of knowledge and productivity
- Reduced employee morale
- Missed opportunities for improvement
- Risk of security breaches
- Increased legal and compliance risks
- Higher turnover costs

**For these reasons, it pays to invest in a proper offboarding process...**

## What should your offboarding checklist look like?

### 1. Pre-departure prep

- Confirm resignation details (last working day, notice period)
- Document resignation acceptance and communicate it to HR
- Create a personalised offboarding plan for the employee
- Inform relevant departments (IT, payroll, facilities, etc.) about the departure



### 2. Communication and announcements

- Notify the team and stakeholders of the departure professionally and respectfully
- Provide a clear plan for reallocating the employee's responsibilities
- Announce the departure to clients or external partners if necessary

### 3. Knowledge transfer

- Schedule a handover meeting to document key responsibilities and processes
- Assign ongoing tasks to other team members or the replacement
- Ensure all critical files, documents and passwords are organised and accessible
- Request detailed documentation of any unique knowledge or workflows



## 4. Exit interview

- Schedule and conduct an exit interview in a private, supportive setting
- Use a standard list of questions to gather insights on workplace culture, leadership and reasons for leaving
- Record feedback and share relevant findings with leadership or HR



## 5. Final pay and benefits

- Confirm last paycheque details, including unused leave, bonuses and other payments
- Communicate the status of benefits like healthcare, pensions or stock options
- Provide information about any severance package (if applicable)

## 6. Asset and access management

- Collect all company assets, including:
  - Laptops, phones and tablets
  - ID cards, keys or security passes
  - Tools, equipment or uniforms
- Revoke access to:
  - Email accounts and cloud storage
  - Company software, databases and tools
  - Building access and Wi-Fi
- Ensure data compliance by archiving or transferring work-related files



## 7. Celebrate contributions

- Organise a farewell event or team gathering (virtual or in-person)
- Thank the employee publicly or privately for their contributions
- Present a parting gift or token of appreciation, if appropriate

## 8. Post-departure tasks

- Send out a final announcement or farewell email internally or externally
- Update organisational charts and contact lists
- Reassign projects or roles formally within the team
- Monitor and address any gaps or issues caused by the transition



## 9. Reflect and improve

- Conduct an internal review of the offboarding process
- Use feedback from the departing employee and team to refine procedures
- Update the offboarding checklist as needed for future departures




# Need help in creating a great offboarding process in your business?

Get in touch and we'd be delighted to help.

## Get in touch

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