

Employee Offboarding Checklist



This checklist has essential tasks you need to remember when an employee leaves your company. Use this checklist by checking the boxes with each task you complete.

How to use this checklist

This checklist was created to do the hard work for you. No more panicking about whether you have or have not completed various offboarding tasks. Simply work your way through this checklist and tick the tasks off as you go.

- ☐ Announce the departure to your team
- ☐ Inform payroll about the resignation
- ☐ Inform the IT department that the employee will be leaving
- ☐ If applicable, organize a public announcement for the employee
- ☐ Ask the employee if they would be happy to attend an exit interview
- ☐ If "yes", schedule a date and time for their exit interview
- ☐ Ask the employee to train their successor in the weeks leading up to their exit
- ☐ Ask the employee to create a list of FAQs and handover for their role when they depart
- ☐ Recover company assets (work cell-phone, laptops, and any other equipment)
- ☐ Recover work lanyard(s)/key tags

- ☐ Update any employer charts to avoid internal confusion
- ☐ Update org charts and directories
- ☐ Confirm the departure date with IT so they are able to revoke their system access
- ☐ Confirm the departure date with payroll to process their final payment
- ☐ Create letters of recommendation and references for the employee
- ☐ Prepare exit interview questions
- ☐ Perform the exit interview
- ☐ If desired, get a “goodbye and good luck” card and a gift for the employee
- ☐ If desired, ask the department/colleagues to sign it
- ☐ Thank the employee for their contributions (ensure they feel valued at the end of their service with your company)

Remember, employees with a successful offboarding process will always remember how professionally it was handled. Many employees will “boomerang” back to your organization. So, if they’re leaving on good terms, make the effort for a warm, respectful exit process.

Luckily, this checklist has made it easy!

