

Offboarding Templates

Ending employment doesn't have to be a negative experience. These templates ensure the smoothest possible transition for any situation. <u>Learn more</u> about these templates.

Offboarding checklist

To make sure the offboarding process is as smooth as possible, there are certain tasks that need to be completed. This checklist will help you make sure you don't miss a thing.

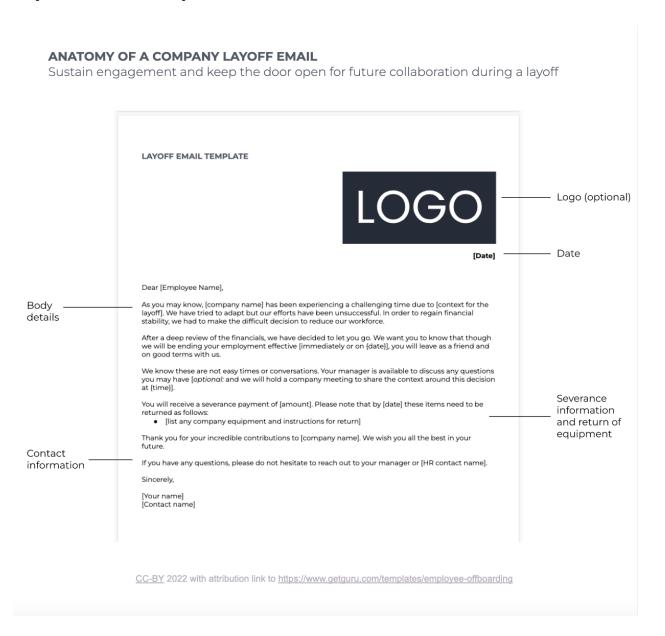
- Work with HR: As soon as you know an employee is leaving, notify HR so they
 can start the offboarding process. If you are new to offboarding, ensuring you
 have a conversation early about how to document any performance problems
 or other issues will be key to ensuring the company is legally protected during
 this important process.
- Notify relevant parties: When an employee leaves a company, it's important to notify the relevant parties. This includes the HR department, the employee's manager, and any other team members they worked closely with.
- Return company property: All company property must be returned before an
 employee leaves. This includes laptops, phones, credit cards, keys, and any
 other items that were given to them for work purposes.
- Destroy confidential information: Any confidential information that the employee has must be destroyed. This includes hard copies of documents as well as digital files.
- Complete an exit interview: An exit interview is a chance for the employer to learn more about why the employee is leaving and get feedback on their time at the company. It's also an opportunity for the employee to ask any questions they may have.



 Close out any final compensation: The final step is to send any compensation or severance that has been agreed upon. This includes ensuring that all relevant paperwork is signed and any final payments are made.

The offboarding process is important to ensure a smooth transition for both the employer and the employee. With this offboarding checklist, you can make sure that all the necessary tasks are completed and that everyone involved feels respected and appreciated.

Layoff email template (edit)

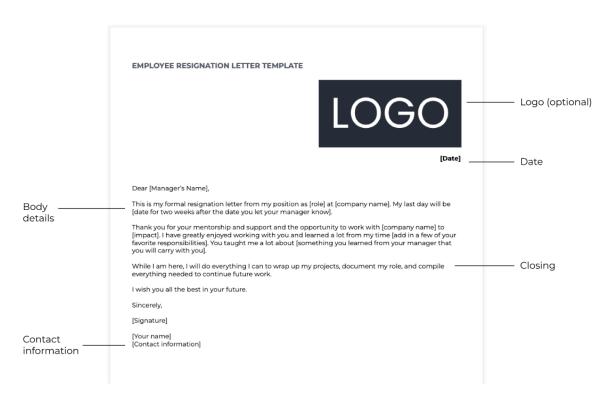




Resignation letter template (edit)

ANATOMY OF A RESIGNATION LETTER

Leave on a high note with trust and keep the door open for future collaboration



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Related templates:

- <u>Change Management Roadmap</u> (Excel, Google Slides)
- Change Management Communications Plan (Excel, Google Slides)
- Change Management Plan Doc (Word)
- Change Management Plan Doc (Google Docs)