



Guide: How to create an effective offboarding process



Turn leaving employees into
ambassadors for your organization

Contents

1	Introduction	03
2	5 reasons why the offboarding process is important	05
3	Step-by-step plan for setting up an offboarding program	11
4	User case: Offboarding at ZEISS with a digital platform	19

Introduction **1**

More and more employers are focused on creating an onboarding strategy, training opportunities and happiness at work. That's great! But... These are not the only elements you can use to improve the employee experience. It's the end part that is often forgotten: exit management or offboarding.

Offboarding is the process that leads to the formal separation between an employee and an organization through resignation, termination, or retirement. It encompasses all the decisions and processes that take place when an employee leaves.

According to [Aberdeen research](#), only 29% of organizations have a formal offboarding program to transition employees out of a company. In fact, employers pay 8x less attention to offboarding compared to onboarding, according to research by [SBI Research](#). Offboarding is, however, just as important as other phases in the employee life cycle!

We know saying goodbye to an employee is not an easy thing to do. Particularly when an employee's contract has been terminated, they can react in different ways: understanding, sad or even angry. Even when your employee has voluntarily found a new challenge, saying goodbye is still bittersweet.

chapter

5 reasons why the offboarding process is important

2

5 reasons why the offboarding process is important

There may be various reasons why an employee leaves an organization or client, for example, their contract may not have been renewed, their (temporary) project has been completed, they have reached retirement age, or they have found another job.

Whatever the reason, every employee deserves a good and structured offboarding program. Now the employee is already leaving, so why should you pay special attention to his or her exit? Well, here's why.

1. Offboarding shows that you value your employees

With an offboarding process in place, you give attention to the employee who is about to leave your organization. When you show appreciation for his or her efforts, the departing employee will leave with a more positive feeling than when you do not.

And when you make time and space available during the offboarding process to discuss possible issues, an employee will feel heard.

The goal of a good offboarding process is therefore not so much to win back a departing employee, but rather to contribute to a positive farewell and a positive perception of you as an employer.

2. Offboarding helps create ambassadors

Okay, but why is a positive farewell so important? Employees represent your organization, also when they leave. And they can leave either as ambassadors or as antagonists.

Ambassadors will speak highly of you and recommend your company to friends and acquaintances. Antagonists will not recommend you to anyone, and that may harm you in the long run.

Offboarding is about making sure all leavers are brand ambassadors, and thus preserving your organization's reputation.

3. Offboarding contributes to cost savings

A good offboarding process therefore contributes to a positive employee experience and the creation of ambassadors. This also makes it more likely that the employee will leave a positive review about you as an employer.



These positive reviews on websites like Glassdoor or Indeed affect your future recruitment process: a positive reputation results in you getting more applicants who are a better fit.

- ★ 83% of employees and job seekers are likely to research company reviews and ratings when deciding on where to apply for a job.
- ★ Companies with positive employer brands get twice as many applications as companies with negative brands.
- ★ When making a decision on where to apply for a job, 84% of job seekers say the reputation of a company as an employer is important.

Source: [Reviewtrackers](#)

A positive offboarding process also leaves the door open for boomerang employees. These are employees who leave the organization, but want to return at a later date: the boomerang effect. This lowers recruitment and onboarding costs by re-hiring a leaver, because he or she is already familiar with your company, methods, processes and culture, and and therefore productive more quickly.

Well-known boomerang hires



Steve Jobs: After resigning from Apple in 1985, Steve Jobs returned in 1997. He propelled the company to new heights and its market capitalization increased from \$3 billion to \$347 billion mainly thanks to the roll-out of the iPhone, iPad and Apple Store.



Michael Jordan left the Chicago Bulls after leading the team to three NBA championships. After an unsuccessful attempt at professional baseball, Jordan returned to the Bulls and led them to three more championships.



Tip: Stay in touch with your former employees through an alumni network! ;-)

4. You can better retain valuable information

Employees who leave take a wealth of valuable information and experience with them. Without a good offboarding process you won't have access to their knowledge and information.

With an offboarding process, however, you ensure a smoother transfer of specific or specialist knowledge to colleagues who will fill the role. By making sure the knowledge is retrievable on paper or in the cloud, your new employee will be productive faster and save training time (and therefore costs).

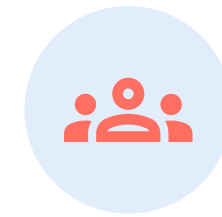
5. Offboarding helps your organization to become better

With an exit interview as part of the offboarding process, you can better understand why the employee is leaving your organization and what your strengths and weaknesses as an employer are.

Money, for example, is often not the problem: only 12% of employees actually leave an organization for more money, says [CareerBuilder](#). So what are the most common reasons why employees leave?



Poor leadership: 75% of employees that leave say it's not because of the work they do, but because of a bad manager, according to a [Gallup poll](#).



Corporate culture: a [Deloitte report](#) found that 72% of employees would leave their current jobs for a more inclusive workplace culture.



Appreciation: according to a survey conducted by [Office Team](#), 66% of employees would likely leave their jobs if they didn't feel appreciated.



Too little growth: 33% of employees leave because of insufficient learning and development opportunities, according to [The Harris Poll](#).

Why did your employee decide to leave? How could this have been prevented? Perhaps you will find out during the exit interviews that you can remove many of the issues experienced by departing employees by taking a few simple steps, and thus improve retention within your organization.



Would you like to increase employee retention even more? Research by Glassdoor shows that organizations with a strong onboarding process improve new hire retention by 82%. So don't forget your [onboarding process!](#)



chapter

Step-by-step plan for setting up an offboarding program

3

Step-by-step plan for setting up an offboarding program

How do you say goodbye to a departing employee? It involves much more than organizing a fitting farewell party. Below you will find eight steps for setting up an effective offboarding program

1. Mapping the offboarding journey

Every employee deserves an offboarding program. Even employees who leave involuntarily have information and responsibilities to transfer. Furthermore, they have made a contribution to your company, so you should at least give them some appreciation in return.

Think about the steps an employee will need to complete in different scenarios (voluntary or involuntary departure).

What needs to be done or arranged, and when? What does the departing employee need to do or know? What could be the obstacles?

The following points should be taken into consideration:

- Seniority: how long has the employee been in the job and how long will it take to transfer the responsibilities and/or knowledge?
- How complex are the responsibilities?
- How soon does the employee want to leave?

Use the answers to create a timeline as a basis for certain parts of your offboarding program.



Also consider which persons and/or departments are all involved: from IT to HR to the manager and the team. For example, HR must be informed and ensure that all administrative matters have been dealt with and recorded. IT should know when to withdraw or transfer rights to programs and the manager should ensure that knowledge is safeguarded and roles and projects are transferred fully in a timely manner.

2. Start with an offboarding checklist

Now that you have mapped out all the offboarding components, make a checklist that you can use to tick off the various steps. Make separate checklists for the employer and the employee.

Think for example of:

- Documenting the departure and checking the last day of work with the manager and HR
- Returning company property, such as a work laptop, work phone, work clothes, lease car, etc.
- Revoking system access

- Signing a confidentiality agreement
- Completing final payment processes

This way, you can distribute the tasks to the right departments and inform everyone early on, so that the offboarding process will go as smoothly as possible.

To make it easier for you, we have produced an example of an offboarding checklist. [Download the offboarding checklist for HR managers here!](#)



The offboarding checklist for HR-managers

[Download here](#)

3. Communicate the departure

Inform the organization that the employee is leaving. Start with informing the employee's immediate colleagues or the colleagues who will be greatly affected, subsequently inform the rest of the organization, and end with the customers, if applicable.

First, ask the departing employee if there is a specific way he or she would like the company to communicate the news. Depending on the position involved, it is customary to break the news 1.5 weeks or more before the departure of the employee.

4. Plan transfers and save knowledge

Once everyone has recovered from the initial shock, you can move on to completing the work properly. Make sure roles, knowledge and contacts are transferred properly.

The information the departing employee has stored in his or her head must be made concrete. Where can a successor find this knowledge? Make sure this is documented so that the replacement gets a clear handover and can start working soon.

Important questions to answer before the transfer:

- Who will be the replacement?
- What training does he or she require?
- Who will onboard and train the new employee?
- What projects need to be completed before the employee leaves?
- What must be delivered?

5. Schedule an exit interview

Schedule the exit interview as soon as you know the date of the employee's last working day, so that both parties know the agenda in advance and can prepare themselves well. This way, the departing employee has more time to reflect on his or her time with the organization and can answer questions more effectively.

An exit interview during the offboarding gives you important information about the work culture, processes, ethics and morals from the employee's perspective.

You can use this information to improve the employee experience and thus retain your best employees.

You may also gain insight into how the competition is doing and obtain valuable information on salary, fringe benefits, number of holidays and, of course, who hired your talent.

Here are some questions you might ask during the exit interview:

- When and why did you start looking for a new job?
- How would you rate the company culture?
- Did you have access to sufficient resources to do your job?
- On a scale from 1 to 10, how intense was the work pressure on an average day?
- Did internal politics prevent you from doing your job effectively?
- What could your manager have done better to retain you?
- Have you been able to develop yourself sufficiently?

- Would you consider coming back in the future?
- Would you recommend our company to a friend or acquaintance who is looking for work?

Optional: You can also have employees fill in a questionnaire anonymously, so they feel more comfortable sharing valuable information and useful observations.

6. Saying goodbye with dignity

Organizing a proper farewell leaves a positive impression on both the employee and current staff. Show the employee that his or her contribution to the team is appreciated!

You can do so in various ways. For example, give a farewell gift, circulate a card on which colleagues can write a message, organize a farewell drink or lunch (or, if you want, a party), and don't forget to thank your departing colleague.

On the last day, it's advisable to send a farewell announcement, as a reminder to the rest of the team to wish the departing employee a fond farewell.



Tip: Make the farewell as personal and visual as possible, for example with photos, a farewell video in which colleagues record a personal farewell message or share lessons learned during their collaboration. Ask colleagues who know the departing employee best to take the lead in this.

7. Actively stay in touch with former employees

Build a network of brand ambassadors or alumni who can promote your organization to potential candidates, such as friends and acquaintances looking for work. Recruiting through referral channels is called referral recruitment and it's one of the [best and most inexpensive recruitment methods](#) to use.



A study entitled 'De stand van Werven 2019/2020' ('The State of Recruiting 2019/2020') conducted by the [Academie voor Arbeidsmarktcommunicatie](#) (Academy for Labor Market Communication) indicated that, with a good 60%, referral recruitment is assessed as the most effective method and is of great importance as a recruitment channel. This is because referrals attract better quality candidates.

When setting up an alumni network, it's important that you research which platform will work best for your leavers. Is the platform easily accessible? What should it be able to do? And is it user-friendly? (We use LinkedIn groups, because our leavers use LinkedIn on a daily basis and therefore know how the platform works.)

Please note! Close your group on LinkedIn so that people who have no business being in the group cannot read your conversations/posts.





8. Invest in technology

Use the right tools to automate and implement a complex process such as offboarding. Automating tasks (workflows), alumni networks and an exit interview questionnaire are examples where the right technology can improve and facilitate the process. This way, you avoid time-consuming, repetitive work for HR and other departments. In the next chapter you can read how ZEISS uses the Appical platform to automate the offboarding process.

chapter

Case study: Offboarding at ZEISS with a digital platform

4

User case: Offboarding at ZEISS with a digital platform



In conversation with Sasja Luijk
HR Manager, ZEISS Benelux

ZEISS has been providing solutions in the field of optics and opto-electronics for more than 170 years. They are a global leader in their field and develop technological innovations for the semiconductor, automotive and mechanical industries. ZEISS products are also used in biomedical research and medical technology as well as in spectacle, camera and cinematography lenses, binoculars and planetarium systems.

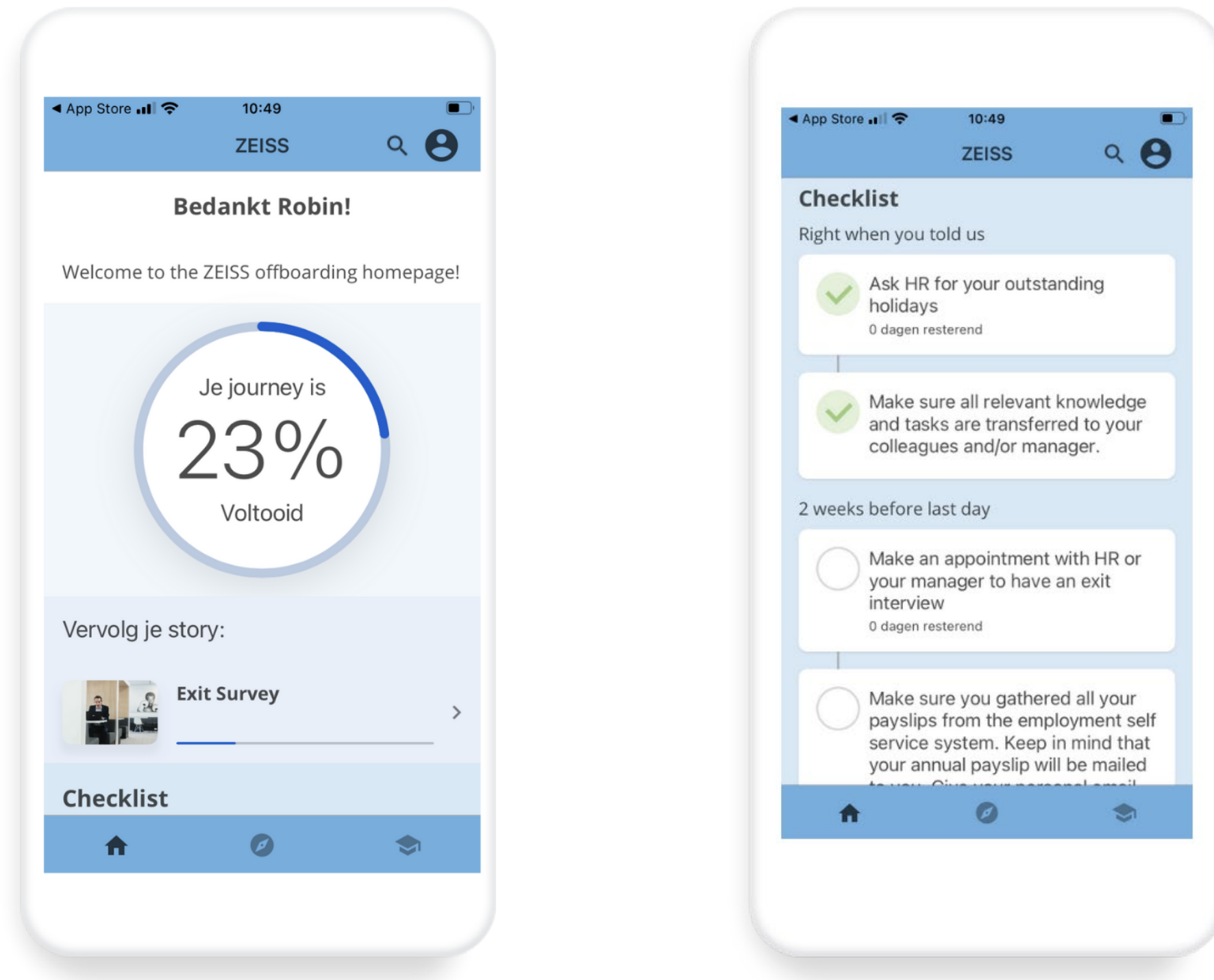
ZEISS has more than 33,000 employees worldwide, of whom 150 work in the Benelux countries. In 2016, the organisation started using the Appical platform for the onboarding of new hires.

After their launch, they decided to explore the end of an employment relationship too: the offboarding. Sasja Luijk, HR Manager Benelux, shows us what their offboarding process at ZEISS looks like.

The challenge

“Our offboarding at ZEISS lacked structure, specifically the exit interviews. We had a form with questions, but the entire process – from the moment someone would indicate they were leaving until their last day at work – was not very structured.”

They started improving the offboarding process by carefully looking at the topics that should always be discussed. “We felt it was important to get feedback about our culture, development opportunities, the supervisor/management, the working conditions and about employee benefits,” explains Luijk. “Those are topics that we in our role can actively change, based on the feedback received, to improve the employee retention rate.”



Why use a digital offboarding tool?

“The advantage of the Appical app is that the employees can give their feedback at any time during the offboarding process,” says Luijk. “The result is that we get more extensive feedback than during one exit interview. An exit interview still forms a part of the offboarding process, but it no longer specifically focuses on getting feedback. The app also allows us to send employees an automatic reminder if they have not yet submitted their feedback.”

The app also contains an offboarding checklist, with items such as returning company property, scheduling an exit interview and transferring knowledge and tasks. Luijk: “Of course we also communicate this information in person, but we see that the power of repetition with the app works really well, and it also makes the process more effortless for HR and managers since automatic reminders can be embedded in the app.”

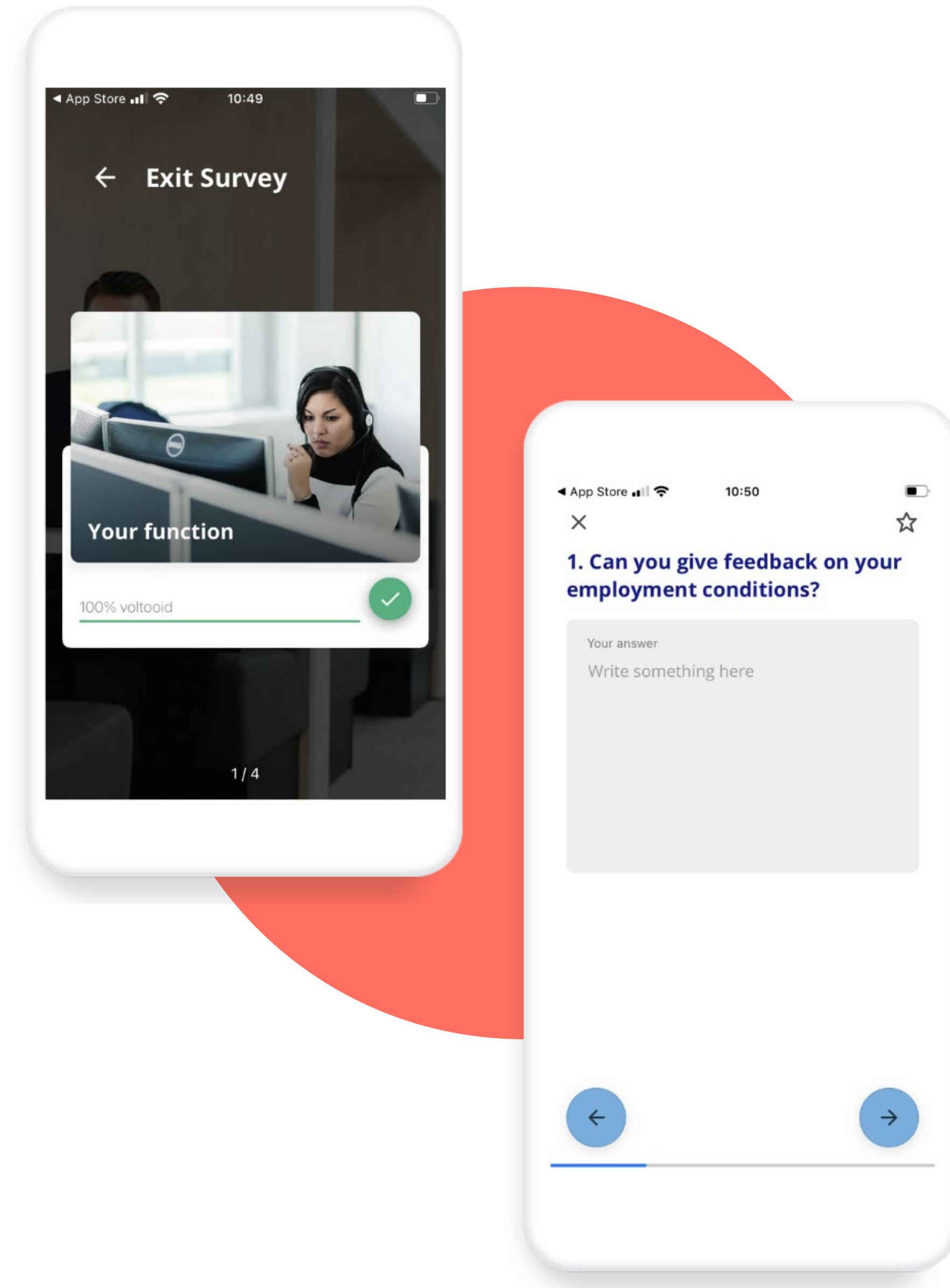
The offboarding platform includes:

- The offboarding comprises a number of sections or blocks, so a departing employee is not inundated with all the information at once. They can simply log in whenever they want and continue their offboarding journey.
- The app is filled with interactive content: for example, ZEISS has built in an offboarding checklist that can easily be ticked off once a task has been completed. The checklist ensures that HR less often has to send someone a reminder, for example to schedule an exit interview, and that more attention is paid to knowledge transfer.
- The app allows departing employees to complete the questionnaire about various aspects of their job and employership. They can do this at home or while commuting, so there is more time and headspace to reflect on questions. The questions can be adjusted depending on the location, position or team.

What are the benefits of the offboarding app?

Using a digital tool enabled ZEISS to set up a clear offboarding process for all the stakeholders and define all the roles and responsibilities.

If they have more time to give their feedback, and employees can do it at a time that suits them, this results in more and more honest feedback. “The offboarding process as we have it now, provides us with valuable information to implement future improvements.”



Create a structured offboarding experience

- Easy-to-build pre- & onboarding, reboarding & offboarding journeys
- Gather feedback and improve your offboarding programme
- Gamification & personalization
- Tracking employee progress & task completion
- API integrations with core HR systems

Discover Appical

