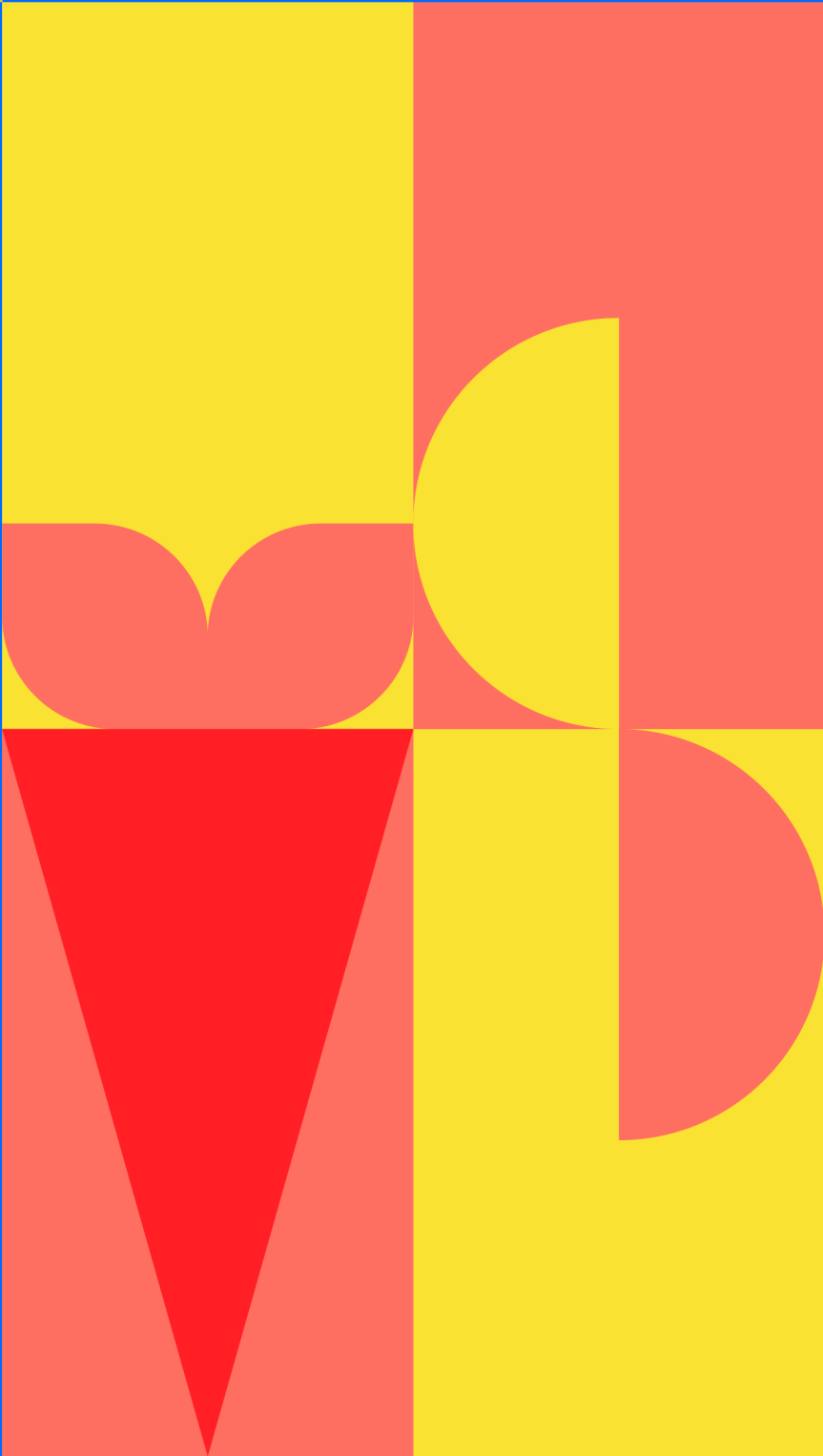# Offboarding checklist for HR Managers

appical

Your employee is ready for a new adventure... But it doesn't have to be a farewell!

Give your co-worker a proper goodbye - not only does it make leaving your company easier for the departing employee, but it is also a good opportunity for growth for your organization. Apart from being able to use their feedback for improvements, your departing employees can become brand ambassadors and refer new colleagues in the future.

What exactly is offboarding? Offboarding is the process that leads to the separation between an employee and a company. It usually starts the moment it is settled that the employee is leaving the company either due to resignation, termination or retirement, and lasts until at least the final work day.

This checklist is intended for HR managers to help with setting up the entire process of offboarding an employee. However, depending on your organization's structure, some tasks (such as the goodbye party) can be carried out by the line manager himself. To make offboarding seem a bit easier, we broke it down to three phases:

- Practical information
- The exit interview
- The goodbye itself.

Make sure to have checked everything by the time the employee has departed to provide them with a smooth transition!

Give everyone a memorable offboarding,

Team Appical

Practical information

- [ ] **Let the team know about the employee's departure. From inner circle to outer circle:**
  - [ ] Inform the employee's direct colleagues
  - [ ] Inform colleagues from different departments
  - [ ] Tell the clients and hand them over to another (new) employee

- [ ] **Have the departing employee prepare an out of office email which will lead people to their new contact person**

- [ ] **Make up the financial balance, including their final salary, remaining vacation days, the end of year bonus, final payslip, annual statement and pension**

- [ ] **Inform them about what you can offer, depending on their future:**
  - [ ] Known: pension schemes, alumni network, referrals
  - [ ] Unknown: support in career coaching, unemployment guidance, recommendations

- [ ] **Make sure their devices are handed in, such as:**
  - [ ] Laptop, mobile phone and all the accessories (such as chargers)
  - [ ] Keys and/or access pass
  - [ ] Secondary benefit cards (transportation, food cards, etc.)
  - [ ] All confidential documents
  - [ ] Lease car and car keys

💡 <u>Appical tip:</u> For an easy transfer of knowledge, make sure to have the employee document their daily tasks, meetings, contact information and file locations. Make implicit knowledge explicit - get the information outside the employee's head and onto paper, content/customer management system or cloud-based archive.

The exit interview - Feedback for the organization

☐ **Let the employee know the reason for this interview so they can prepare:**

  ☐ What kind of topics can they expect?

  ☐ Why is their opinion important?

  ☐ What will happen with their feedback?

☐ **First, start with questions about the organization - here are some examples:**

  ☐ What is the reason for your leave?

  ☐ What did you like about [the organization], and what grade would you give? Why?

  ☐ Was your salary competitive for the market?

  ☐ Were you satisfied with your terms of employment (e.g. travel expenses, bonus, pension, holidays, insurance, etc.)

  ☐ Were you satisfied with the arrangements regarding devices (laptop, mobile, lease car)?

  ☐ Were you satisfied with your working hours and work pressure?

  ☐ Were you satisfied with the assessment cycle?

  ☐ Were you satisfied with the working atmosphere within the company?

  ☐ Were you satisfied with the facilities (e.g. coffee, lunch, machines, etc.) within the company?

💡 **Appical tip:** For easier measurements, feel free to ask the employee to fill in a survey instead, rating statements from 1-5. Using a digital application such as Appical for offboarding can make it easier for the employees to express themselves and be honest rather than face-to-face.

The exit interview - Cooperation with the manager and colleagues

- [ ] **Ask the employee how they feel about cooperation with their manager:**

  - [ ] Were you satisfied with the collaboration between you and your manager?

  - [ ] Did you feel like you could trust your manager?

  - [ ] Were you satisfied with the support you received from your manager?

  - [ ] Were you satisfied with the goals set by your manager?

  - [ ] Did you feel like your manager invested enough time in your growth and development?

  - [ ] Did you feel like your manager listened to your opinion?

- [ ] **Check how they felt about cooperation with their direct colleagues:**

  - [ ] Were you satisfied with the collaboration between you and your direct colleagues?

  - [ ] Did you feel like you could trust and rely on your colleagues?

  - [ ] Were you satisfied with the support you received from your colleagues?

  - [ ] Did you feel like as a team you all had the same vision, aiming in the same direction?

  - [ ] Were you satisfied with the connection between you and your colleagues?

The exit interview - The employee's function and growth

☐ **And what about the employee's function within the organization?**

    ☐ Were you satisfied with the content of your work?

    ☐ Did you experience autonomy within your work?

    ☐ Were you satisfied with the balance between work life and personal life?

    ☐ Did you have sufficient resources available to carry out your work properly?

    ☐ Were you motivated to carry out your work?

    ☐ Did you find your job challenging, meaningful, interesting or boring?

    ☐ Did your job meet your expectations?

☐ **Ask how the employee felt regarding their growth:**

    ☐ Did you feel like you were motivated regarding your own growth?

    ☐ Did you feel like you had enough room to grow within the company?

    ☐ Were you satisfied with the learning opportunities you got from the company?

    ☐ Did you feel like you could attend all courses/events/conferences you wanted to?

    ☐ Did you feel like you missed out on opportunities regarding your growth?

A **goodbye,** not a farewell

- ☐ Organize a (virtual) goodbye party/drinks/lunch (make sure to find out what the employee prefers to make the goodbye more personal)

- ☐ Thank the departing employee for the work and effort they put into their job

- ☐ Stay in touch to create brand ambassadors

- ☐ Build a lasting relationship through an Alumni network

- ☐ Review the employee's feedback from the exit interview

- ☐ Act on the feedback and make improvements within the organization

💡 **Appical tip:** During the goodbye party, surprise the departing employee with a "goodbye package" including a handwritten goodbye note from all their colleagues! Especially when working remotely, create a goodbye video with personal messages and memories with the employee for a more memorable goodbye.

Go next level with your Offboarding experience

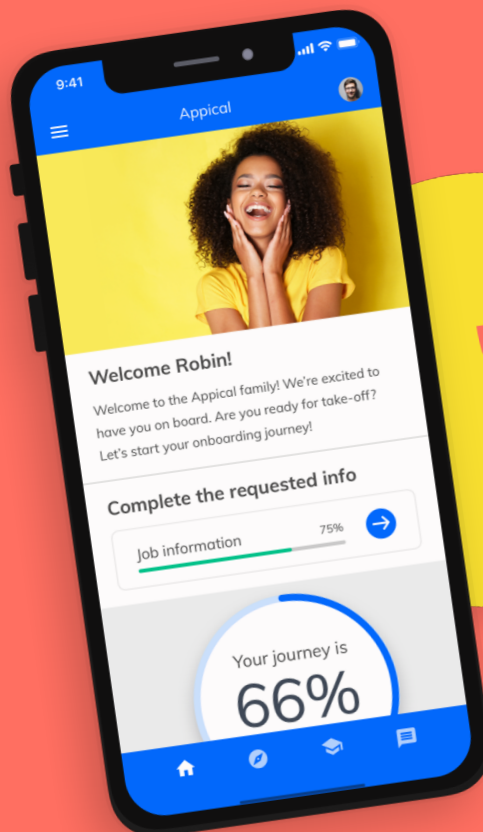Digitize and automate your Onboarding & Reboarding process with our easy-to-use & safe platform

Preboarding, onboarding, reboarding & offboarding

Easy-to-build onboarding journeys

Gamification & personalization

Tracking employee progress & task completion

Manager toolkit

Collect feedback & improve your reboarding program

API integrations with core HR systems

ISO certified

For more information contact us at:

info@appical.net

+31 20 820 8706

appical.net