

What is Employee Offboarding?

Employee offboarding is the process & experience of a team member as they part ways with their coworkers and the organization they have worked for. The purpose of offboarding is:

1. To help the organization learn more about the employee experience
2. To keep the impact of the employee's departure on the business to a minimum.
3. To help shape the last impressions an outgoing employee will have of the company – and what they will share about the company to the “outside world.”
4. To support the employee during a time of transition (always challenging whether the circumstances are overall positive or negative)

Why Does This Matter?

Employee offboarding can often be the forgotten task of People & Culture but it's critically important. Some of the benefits are immediately obvious, like returning company property and security access, but others have more long-term impact to both your people in the organization and those on the outside. Some of the key benefits include:

- Learning about the employee experience
- Security of company IP & assets
- Return of property
- Adherence to regulations & compliance
- Alumni employees can become ambassadors
- Alumni employees can become future customers
- Former employees can return to be employees again

How Do You Measure It?

What Does an Ideal Process Look Like?

What does an ideal offboarding process look like? Each offboarding process should be designed to fit the culture of your organization and the details may vary based on the industry and the role the person had in the organization. Here is a guideline of the key steps of a world-class offboarding process:

12 Key Steps

1. Thank you
 - For your service, for providing notice
 - Is there anything we can do to help you in your transition and next moves?
2. Create a plan for coverage and rehiring
 - What is the immediate, short-term plan
 - Is there someone who can move into this role
 - If an external hire is required, what do know now that you didn't then?
3. Communication Plan
 - Don't be tempted to keep it a secret. Be honest and say they are leaving.
 - Take charge to be 'in control' of the message.
 - Order is important. Ensure team and managers find out first before the rest of the organization.
4. Inform Payroll (HRIS if applicable)
 - Start this process early so you can just 'flip a switch' on the final day
 - Think of all perks & benefits that may need to be turned off
5. Coordinate knowledge transfer

- What knowledge, processes, ideas do we need from this person and who should they provide that to?
 - What documentation might they need to organize before their departure?
 - What critical relationships do they have outside the organization that need to be transferred to someone else?
6. Arrange to recover company property
 - Technology, phones, identification, key cards, keys, uniforms, vehicles
 - Credit cards, banking information
 7. Do an exit interview
 - Schedule it with a neutral party.
 - Take it seriously. Allot ample time.
 8. Revoke company access
 - Digital - email, network, communication channels.
 - Physical - building(s), vehicle(s).
 9. Depart with dignity
 - Acknowledge their leaving on their last day.
 - Celebrate their accomplishments and wish them well.
 10. Stay in touch
 - Get forwarding contact information.
 - Create / add them to your alumni group.
 11. Update your organizational chart
 - Prevents internal confusion
 - Clarifies reporting structure for new managers & team members
 12. Review exit interview learning with leaders
 - Carefully assess the feedback from the leaving team member
 - Compile themes and key messages
 - Create actions with the manager / department leader

The Exit Interview

The exit interview can provide you with a wealth of information. It can give you insights into your organization's strengths and weaknesses and how to improve the overall employee experience. The interview should be conducted by a 'neutral' person - like someone in People & Culture (HR). Since employees sometimes are 'leaving their manager', you want them to feel comfortable in the exit interview so you are able to capture that valuable information they have to share. Take all feedback seriously, don't defend, and remember that the exit interview is one of those moments that matter, so how you conduct it will be a big part of the final impressions the departing employee will remember of the organization and culture.

There are 100's of possible exit interview questions depending on the leaving employee's situation, but make sure you ask these at a minimum.

1. If we could improve in any way, how would we do it?
2. What are we not doing that we should be doing?
3. Who is really kicking ass in the company? Who do you admire?
4. Is there anything we could have done to make you stay?
5. Did the job live up to your expectations?
6. Would you recommend our company to friends looking for work?
7. How was your relationship with your manager?
8. What did you think of your onboarding when you first joined?
9. How would you describe our culture? What do we live up to, what don't we?
10. What's not fun about working here?

Additional / Probing Questions:

- Why did you begin looking for a new job? When?
- What ultimately led you to accept the new position rather than remain here?
- What could have been done for you to remain a team member here?

- Do you believe you were equipped to do your job here well?
- Did you know what was expected of you here? Did you have clear goals?
- What was the best part about your job? What would you change about it?
- What are the key qualities and skills we should seek in your replacement?

- How was your relationship with your manager(s)? What can they improve on?
- Did you receive feedback to help you improve your performance?
- Were you given opportunities that challenged you to grow?
- What are your views about leadership, in general, at our company?

- How would you describe the culture at <company>?
- What do you value about your time at <company>? What did you dislike about your time here?
- Did you feel like a valued member of the company?
- You can change anything about your job or the company, what would it be?
- What are the biggest opportunities for <company> to improve?

- Would you consider coming back to work here in the future? What function or role would you consider returning to? Would anything need to change?
- Would you recommend our company to a friend or family member looking for a job?
- Is there anything I haven't asked you that I should be asking you?
- Any other comments (people to acknowledge, etc)?

Employee Offboarding Checklist

Goodbyes are not easy. However, when it comes to offboarding employees, a well-structured process that considers how you want them to feel and how to make the best of the long-term benefits can make things stress-and hassle-free.

- ☐ Thank the Leaving Employee
- ☐ Coverage Plan
- ☐ Communications Plan
- ☐ Update Payroll & HRIS systems
- ☐ Update Organizational Chart
- ☐ Coordinate Knowledge Transfer
- ☐ Arrange Recovery of Company Property
- ☐ Conduct an Exit Interview
- ☐ Revoke Company Access
- ☐ Departure with Dignity
- ☐ Stay in Touch
- ☐ Review Exit Interview Learning with Leaders