

# Offboarding Process Map


GUIDE

# Introduction

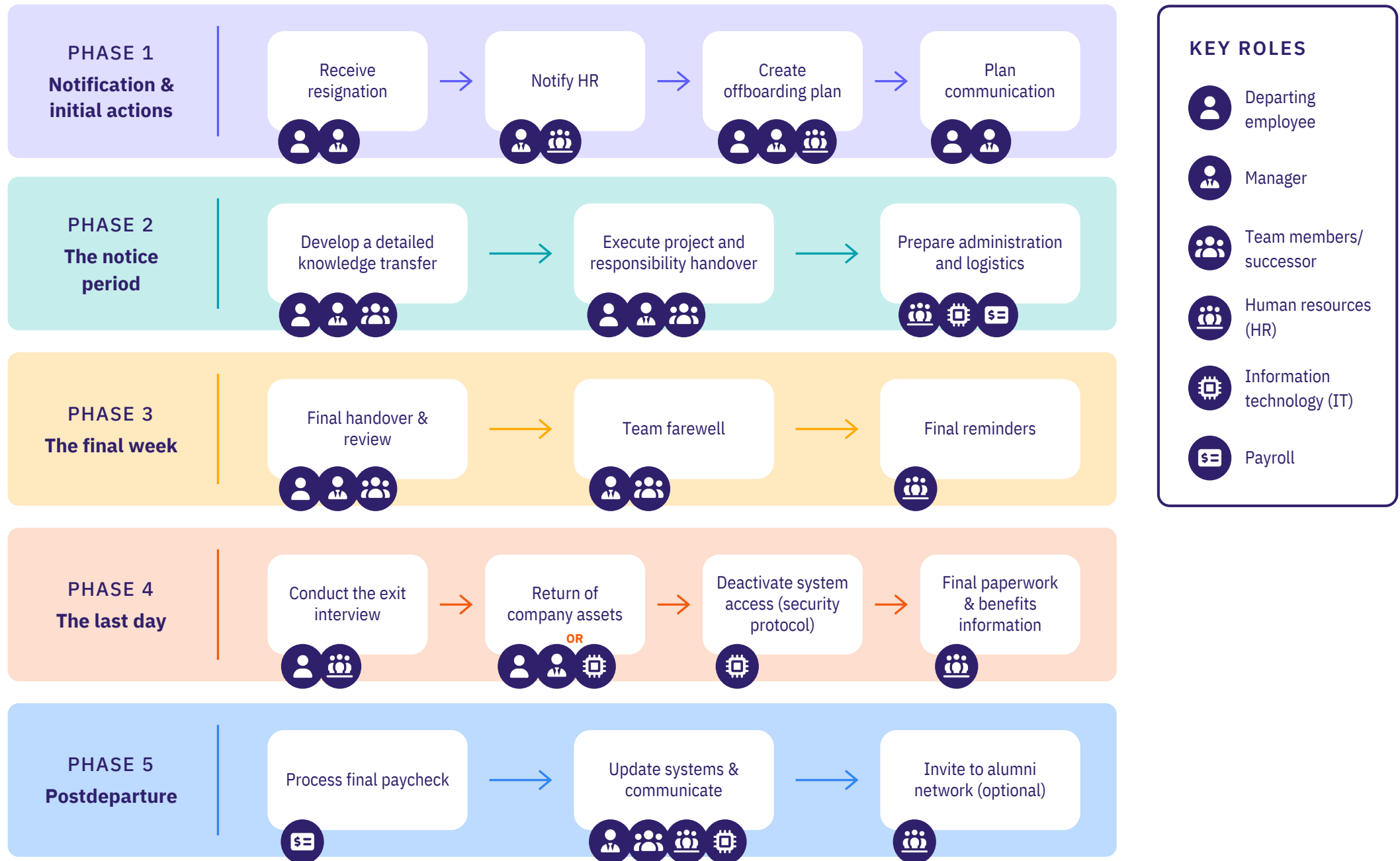
The offboarding process is the strategic set of procedures for managing an employee's departure from the organization. A well-executed offboarding is crucial for HR as it ensures a smooth transition, protects company assets, captures valuable feedback, and preserves the employer brand. While this process is owned and facilitated by Human Resources, its success depends on the close collaboration of several key roles, including the departing employee, their manager, team members or the successor, information technology (IT), and payroll.

This resource is a comprehensive process map designed to guide you through every stage of a successful offboarding. At the beginning, you will find a main map that provides a high-level overview of the five key phases. Following this, the subsequent pages break down each phase in detail, outlining the critical actions for each step. To make responsibilities clear at a glance, each role is assigned a unique icon, which you will see throughout the map to indicate who is involved at every point in the process.

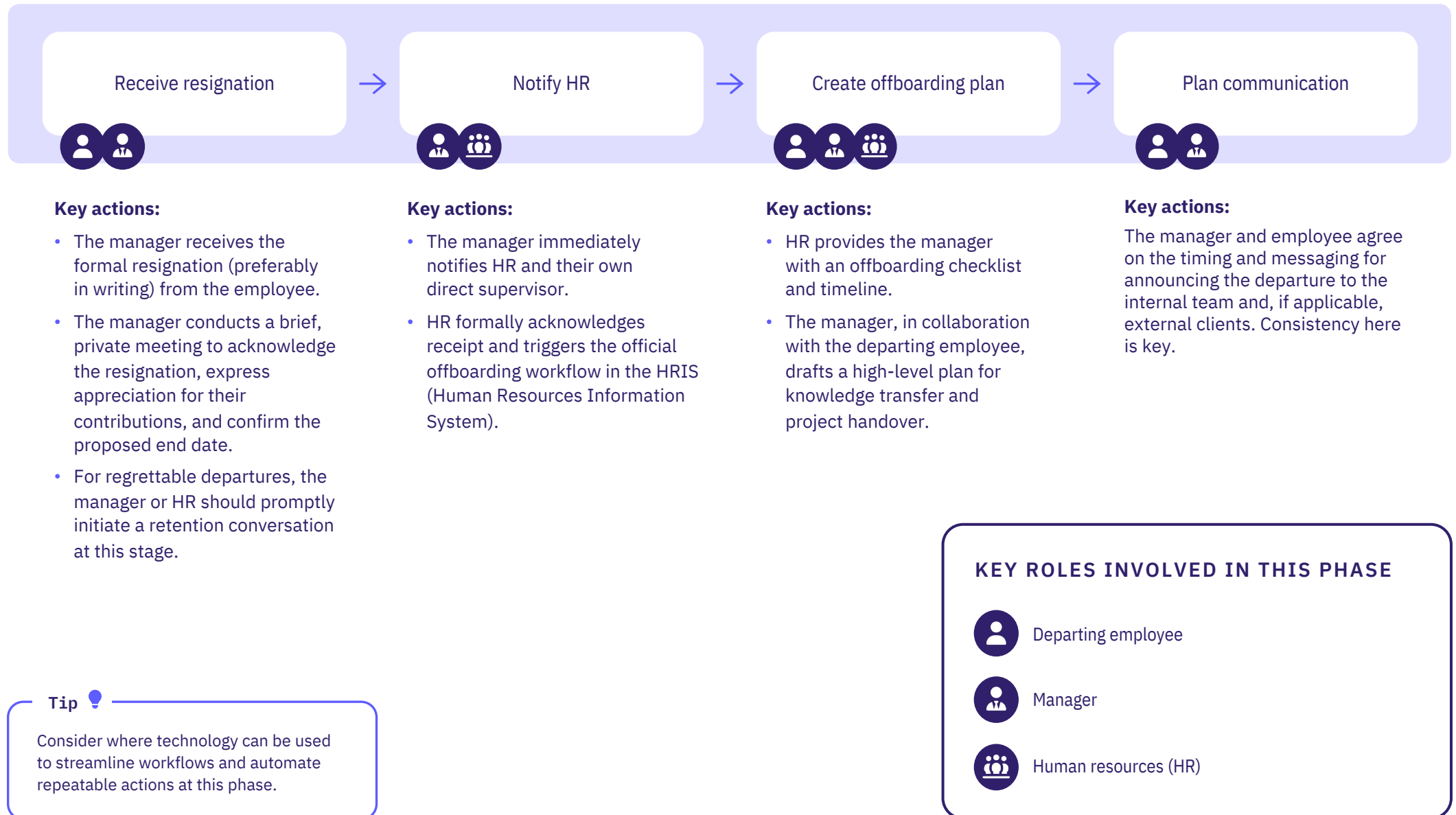
## The offboarding process

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- Phase 1: Notification & initial action
  - Phase 2: The notice period
  - Phase 3: The final week
  - Phase 4: The last day
  - Phase 5: Postdeparture

# Offboarding Process Map



# Phase 1: Notification & Initial Actions



# Phase 2: The Notice Period

Develop a detailed knowledge transfer



Execute project and responsibility handover



Prepare administration and logistics



## Key actions:

- The departing employee and manager identify all critical knowledge, skills, processes, and relationships held by the employee.
- The departing employee also:
  - Documents key procedures, creates "how-to" guides, and records video tutorials for complex tasks.
  - Organizes and cleans up all digital files and project folders for easy access.
  - Works with manager to schedule "shadowing" sessions where the replacement or team members can observe the employee's workflow.

## Key actions:

- The departing employee or their manager facilitates the following processes:
- Formally transition ownership of all ongoing projects, tasks, and client relationships.
  - Update project management software (e.g., Asana, Jira, Trello) to reflect new ownership.
  - Conduct handover meetings with the team/successor to walk through all responsibilities and answer questions.

## Key actions:

- HR schedules the exit interview for the final week.
- HR and Payroll coordinate to prepare the final paycheck, including any accrued vacation time, bonuses, or expense reimbursements, ensuring compliance with local regulations.
- IT is notified of the departure date to schedule the deactivation of accounts.

## Tip

At this phase, it is good to refer to the succession plan for the role or to tap into the internal talent pool to backfill the role. If no internal successor exists, start the recruitment process.

## KEY ROLES INVOLVED IN THIS PHASE



Departing employee



Human resources (HR)



Manager



Information technology (IT)



Team members/  
successor



Payroll

# Phase 3: The Final Week

## Final handover & review



### Key actions:

- The manager meets with the employee to review the handover checklist and ensure all knowledge transfer is complete.
- Manager addresses any last-minute questions from the team.

## Team farewell



### Key actions:

Manager and team members organize a farewell activity (e.g., team lunch, morning coffee, sending a card) to recognize the employee's contributions and provide closure for the team.

## Final reminders



### Key actions:

HR sends a reminder to the employee about the last-day schedule, including the exit interview and asset return process.

### Tip



Use technology to automate notifications and reminders to ensure logistics are streamlined.

## KEY ROLES INVOLVED IN THIS PHASE



Departing employee



Manager

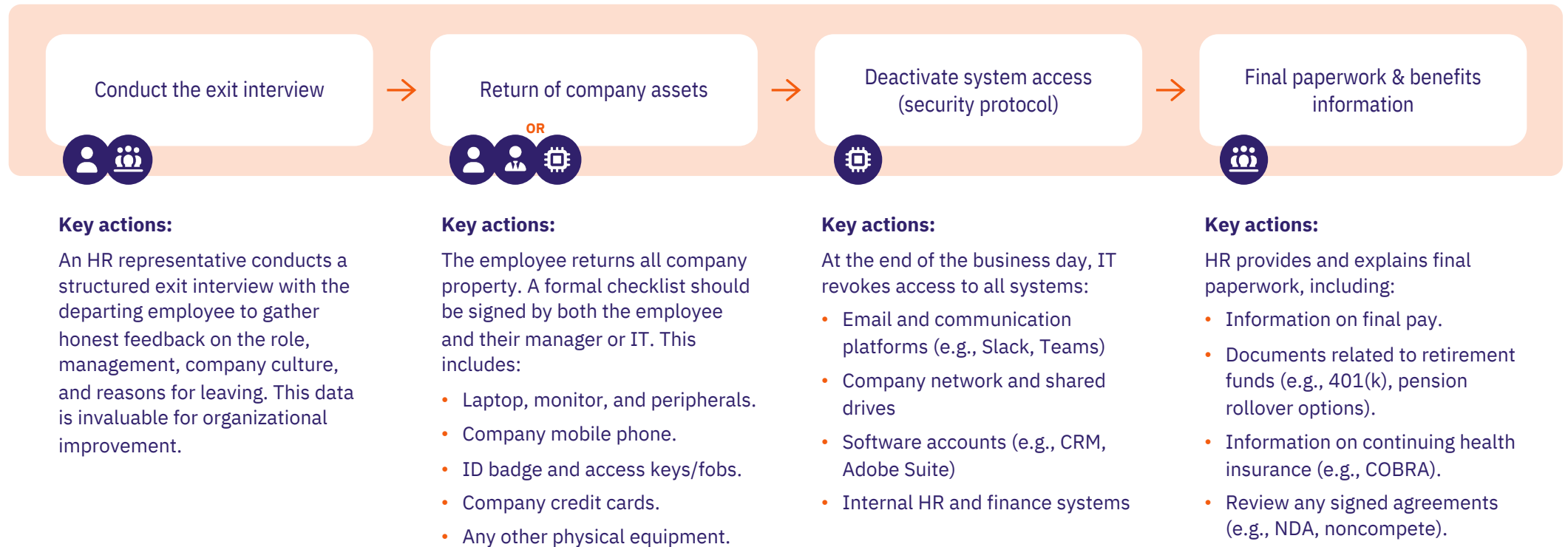


Team members/  
successor



Human resources (HR)

# Phase 4: The Last Day



## KEY ROLES INVOLVED IN THIS PHASE



Departing employee



Human resources (HR)



Manager



Information technology (IT)

# Phase 5: Postdeparture

Process final paycheck



## Key actions:

Payroll processes the final payment in accordance with the agreed-upon schedule and legal requirements.

Update systems & communicate



## Key actions:

- IT helps set up an email auto-responder and/or forward their email to the appropriate colleague.
- HR will arrange to update the company directory, organizational charts, and website with the relevant parties.
- The manager holds a team meeting to address any workflow changes and confirm the plan for managing the vacant role's responsibilities.

Invite to alumni network (optional)



## Key actions:

HR can invite the former employee to join the company's alumni network (e.g., on LinkedIn). This maintains a positive long-term relationship and turns former employees into brand ambassadors.

## KEY ROLES INVOLVED IN THIS PHASE



Manager



Information technology (IT)



Team members/  
successor



Payroll



Human resources (HR)