



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

Phase 1: Notification & initial action

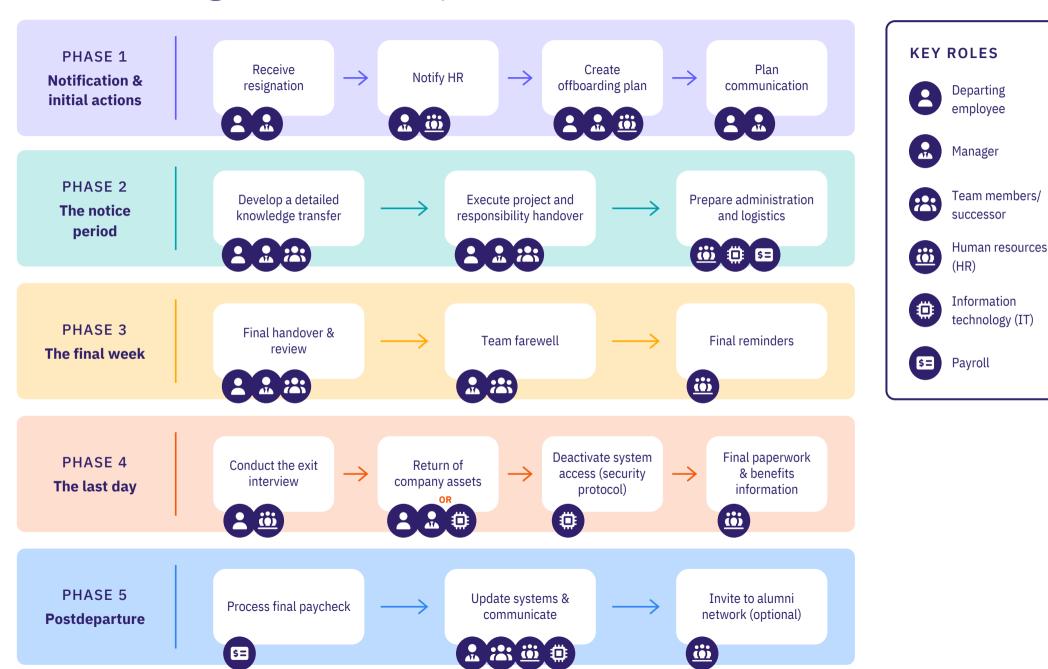
Phase 2: The notice period

Phase 3: The final week

Phase 4: The last day

Phase 5: Postdeparture

Offboarding Process Map



Phase 1: Notification & Initial Actions

Receive resignation \rightarrow Notify HR \rightarrow Create offboarding plan \rightarrow Plan communication

Key actions:

- The manager receives the formal resignation (preferably in writing) from the employee.
- The manager conducts a brief, private meeting to acknowledge the resignation, express appreciation for their contributions, and confirm the proposed end date.
- For regrettable departures, the manager or HR should promptly initiate a retention conversation at this stage.

Key actions:

- The manager immediately notifies HR and their own direct supervisor.
- HR formally acknowledges receipt and triggers the official offboarding workflow in the HRIS (Human Resources Information System).

Key actions:

- HR provides the manager with an offboarding checklist and timeline.
- The manager, in collaboration with the departing employee, drafts a high-level plan for knowledge transfer and project handover.

Key actions:

The manager and employee agree on the timing and messaging for announcing the departure to the internal team and, if applicable, external clients. Consistency here is key.

KEY ROLES INVOLVED IN THIS PHASE





Human resources (HR)

Tip

Consider where technology can be used to streamline workflows and automate repeatable actions at this phase.

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 "howto" 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.



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.

KEY ROLES INVOLVED IN THIS PHASE



Departing employee



Human resources (HR)



Manager



Information technology (IT)



Team members/ successor



Payroll

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.

Phase 3: The Final Week

Final handover & review

Team farewell

Final reminders

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.

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.

Key actions:

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

${\tt KEY\ ROLES\ INVOLVED\ IN\ THIS\ PHASE}$

- Departing employee
- Manager
- Team members/ successor
 - Human resources (HR)

Tip

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

Phase 4: The Last Day

Conduct the exit interview



Return of company assets



Deactivate system access (security protocol)



Final paperwork & benefits information





Key actions:

An HR representative conducts a structured exit interview with the departing employee to gather honest feedback on the role, management, company culture, and reasons for leaving. This data is invaluable for organizational improvement.



The employee returns all company property. A formal checklist should be signed by both the employee and their manager or IT. This includes:

- · Laptop, monitor, and peripherals.
- Company mobile phone.
- ID badge and access keys/fobs.
- Company credit cards.
- Any other physical equipment.

Key actions:

At the end of the business day, IT revokes access to all systems:

- Email and communication platforms (e.g., Slack, Teams)
- Company network and shared drives
- Software accounts (e.g., CRM, Adobe Suite)
- Internal HR and finance systems

Key actions:

HR provides and explains final paperwork, including:

- Information on final pay.
- Documents related to retirement funds (e.g., 401(k), pension rollover options).
- Information on continuing health insurance (e.g., COBRA).
- Review any signed agreements (e.g., NDA, noncompete).

KEY ROLES INVOLVED IN THIS PHASE



Departing employee



Human resources (HR)



Manager



Information technology (IT)

Phase 5: Postdeparture

Process final paycheck

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Update systems & communicate



Invite to alumni network (optional)



Key actions:

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



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.

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)