



10 STEPS GUIDE TO GOOD OFFBOARDING PROGRAMME



Introduction

In hiring and managing employees, most organizations have well-documented onboarding process to make sure a new hire's transition into the company is smooth. But an employee's transition out of a company is equally important. Exit Management or employee offboarding is a process to manage the full and final settlement of employees when they exit from an organization.

When an employee resigns, retires or is being terminated from work, the required paperwork and formalities associated with employee exit need to go through a systematic process. Exit interview, clearance from various departments, replacement of the departing employee, full and final settlement of employee dues and more – HR has a lot on the plate during employee offboarding. Whether or not that employee leaves voluntarily, it's important to establish offboarding guidelines to instill a clear exit path that shows mutual respect for all parties, both in the short- and long-term.

Impact of Poor Offboarding –

Offboarding is the process at the end of an employee's tenure. It involves logistical details like returning company property, transitioning work and projects to others, and letting key stakeholders know about changes in personnel. It's also a way to gain insights and feedback that can help the organization and employee in the future. Treating exiting employees as if they are of lesser importance of current ones is a sure way to damage your reputation, given that many individuals maintain contact and friendships with those they left behind. Knowing a colleague was treated well when they left creates a positive ripple effect for those who are left behind, knowing that when they leave, they can expect the same.

Goals for Offboarding-

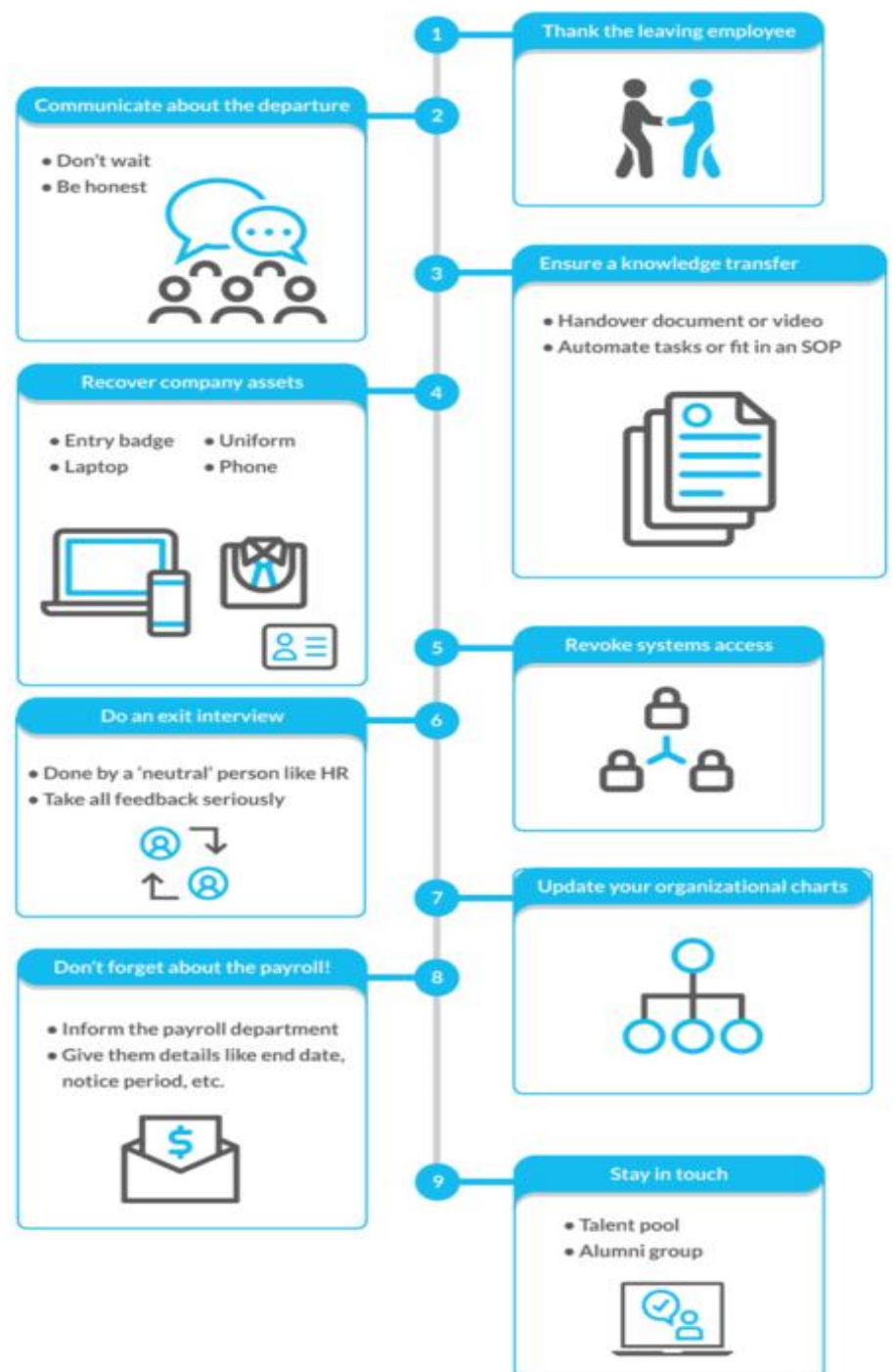
Beyond simply transitioning an individual from current to former employee, there should be certain goals established to maintain a clear, strategic offboarding process.

- 1. Gain Feedback and Insight** - Offboarding is a way for an employee to give honest, constructive feedback on their employee experience, identify any red flags, and find closure for a particular job. This can provide valuable insight for an organization regarding its corporate culture and help determine whether any concerns discussed were one-off incidents or could possibly be symptoms of a larger systemic problem.
- 2. Maintain a Positive Reputation-** This goes both ways, but it's never wise to burn bridges. Word of mouth spreads quickly and reputations can be quickly damaged. More an organization can do to positively influence the last impression it leaves with an exiting employee, the better the organization's talent brand will be served.

Creating an offboarding plan is essential

Here are some of the main reasons why.

- ✓ **Diminish financial losses** – without an offboarding plan, situations can arise such as incorrectly continuing to pay benefits to employees no longer in the company.
- ✓ **Maintain a good final impression** – part your ways on the best terms. Make sure that the outgoing staff member leaves on good terms, feeling respected and appreciated for their work.
- ✓ **Manage legal issues** – collecting and signing the proper documentation following a resignation or dismissal helps avoid the risk of lawsuits for unfair dismissal. It also ensures a smooth offboarding.
- ✓ **Manage logistics in the transition** – who will take over once the employee has left, and how will the team handle the transition. These and more are the questions that will be answered in part of the offboarding procedure.
- ✓ **Gather feedback** – outgoing employees are an incredible wealth of knowledge for the company. Listening to their suggestions for improvement benefits the company greatly.



How to Offboard Employees: 11 Key Steps

These steps will differ slightly depending on the size of the company, the reason the employee is leaving, and the position the employee held. However, in general, here are 11 steps when it comes to offboarding.

- 1. Create an offboarding checklist** - Checklist covers all the steps we're about to share in the employee offboarding process, exit interview questions, and a company property collection list.
- 2. Initial Documentation & Collection of Information** - The first thing that needs to be done upon the news of an employee leaving is to have them sign a formal resignation letter. Following this, the HR manager or supervisor can review documents the employee has signed throughout their time in the company. As an example, these may be non-disclosure agreements, benefits documents, etc. Make sure that on the resignation letter, the employee clearly states when their last working day is, and the date they are communicating their leave.
- 3. Inform Accounting** - At this stage, you can inform accounting so they can prepare tax documents, the last payroll, calculate any outstanding reimbursements, vacation days, and prepare compensation if required.
- 4. Announce Departure** - Rather than wait for employees to start gossiping around the office, make sure that all employees who are impacted in a major way, as a result of the departure, will be informed. This is typically done, 1.5 weeks or more before the employee leaves, depending on their role in the team. Following this, other members of staff can be informed. As a courtesy, it's best to ask the outgoing employee whether there is a specific way they would like the company to frame the news.
- 5. Plan Handoffs** - The important piece at this stage is to focus on the creation of a handoff plan to ensure the best possible transition. This plan is focused on wrapping up any existing tasks, whilst also laying the groundwork for the new employee entering into the role. A clear understanding of how to transition the workload and shift priorities is key! This is the stage of knowledge transfer.

Important questions to ask while planning the handoff are:

- ❖ Who will be the replacement?
- ❖ What will their training needs be?
- ❖ Who will train the new employee?
- ❖ Which projects need completion before the employee leaves?
- ❖ What are the deliverables?

- 6. Client communication**- In the case the outgoing employee works directly with clients, it is vital that these clients be notified in due course. Also, in whichever way you decide to

communicate this departure with the clients, it is best to approach the communication in a way that ensures each client knows they will continue to be taken care of, regardless of the change in staff.

- 7. Collect Company Property** - During the employee's time in the company, they may have acquired a number of company items. In the days before they leave, you will need to collect these items. Company property can be anything from computers, mobile devices, ID badge, uniform, keys, parking permits, or company credit cards among others.
- 8. Exit Interview** - The purpose of an exit interview is to gain valuable feedback on the employee's experience while with the company. This is the company's last opportunity to make a positive impression. From the exit interview, you can also gather information from the employee that will help management make better decisions in the future. Asking the right questions will provide management with valuable information and insights for the company, into their strengths and weaknesses, and how they can improve.
- 9. Revoke Account Access** - No matter how good of a relationship you have with the outgoing employee, for security reasons, they should no longer have access to emails, platforms, and other company databases when they leave.
- 10. Farewell** - Although depending on the reasons for the departure, a farewell is always a good idea for each and every employee. This type of sendoff ensures a positive impression is left for both the employee leaving and the existing staff. Show the employee that you have valued their contribution to the team. This can be done by giving them a gift, writing a thank you from the team or even throwing a party for them. On the last day, it is advisable to send a farewell announcement, as a reminder to the rest of the team to wish the outgoing employee a good farewell.

Conclusion

Employee offboarding isn't a permanent goodbye. Make sure to treat the exiting employee well with gratitude and leave an unforgettable milestone in their professional voyage. Try out the best exit management practices and end an employee's journey with your organization on a good note.





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