iSpring

Employee Offboarding Checklist

Close the chapter professionally, keep current employees engaged, and avoid unnecessary risks to your HR brand.

Employee Offboarding Checklist

A Gallup survey of 150 CHROs from Fortune 500 companies found that only 10% believe their company handles employee exits effectively. That means most organizations, even at the enterprise level, struggle with offboarding, leaving them exposed to compliance risks, security gaps, and reputational damage.

To close this gap, we've developed a step-by-step employee offboarding checklist that will help HR professionals handle employee exits right.

1 Schedule 1:1 with a manager

Set up a private conversation between the departing employee and their manager.

Understand the key motivators behind their resignation to see how you can help.

Explore whether an internal transfer or role adjustment could be an option.

Acknowledge their contributions and set a positive tone for the exit.

Align on a transition timeline and discuss critical next steps.

2 Accept the resignation letter and define the offboarding plan

Accept the resignation letter and notify all offboarding stakeholders (HR, IT, legal, and finance teams).

Confirm the last working day based on the notice period and terms of the contract.

Discuss how responsibilities will be reassigned.

3 **Plan and execute knowledge transfer**

Identify ongoing projects, critical tasks, and hidden responsibilities of the departing employee.

Make a list of key contacts (employees, customers, and partners) they interact with as part of their role.

Assign a successor or team member to assume their responsibilities.

Encourage the departing employee to create and share tutorials and guidelines on key processes and best practices for the remaining team.

Schedule handover meetings with the team or successor.

4 **Arrange final payroll, benefits, and legal compliance**

Process the final paycheck according to state labor laws.

Calculate and pay out unused PTO, bonuses, commissions, and severance (if applicable).

Provide COBRA (U.S.) or continued benefits enrollment options.

Review 401(k) rollover, stock options, and vested shares.

Ensure compliance with non-compete agreements, NDAs, and post-employment obligations.

Issue a formal offboarding letter and employment verification documents.

5 **Perform an exit interview**

Start on a positive note by acknowledging the employee's contributions.

Clarify that their feedback is confidential and will be used for internal improvements.

Provide an optional written exit survey for employees who prefer to give feedback in writing.

Ask about the main reasons for leaving and hidden pain points (were there unresolved concerns that led to their departure?).

Use rating scales (1–10) for aspects like job satisfaction, workload, compensation, and stress levels.

Balance the conversation: allow space for honest feedback while reinforcing a professional, constructive discussion.

Ensure that the departing employee feels heard and valued, reducing the risk of negative reviews.

Address future connections, discuss potential boomerang opportunities, or stay in touch.

Summarize key insights and identify recurring themes across multiple exits.

If applicable, flag urgent issues that need immediate attention.

6 Revoke company property and system assess

Deactivate email, internal systems, and SaaS accounts.

Remove access to CRM, HRIS, financial software, and project management tools.

Conduct an IT audit to ensure that no access remains.

Transfer ownership of shared files, email accounts, and admin controls.

Collect all company-issued equipment (laptops, mobile devices, peripherals, ID badges, access cards, uniforms, etc.)

For remote employees, provide clear return instructions and conduct verification of compliance with those instructions.

7 Announce the departure internally and externally

Notify the immediate team first before sending out a company-wide communication.

If applicable, notify clients or external partners and introduce a new point of contact.

Update organizational charts, company directories, and email groups.

8 Plan for role replacement or workload redistribution

Determine if the role needs immediate replacement or can be restructured.

If hiring, start the recruitment process early to avoid productivity gaps.

Reassign critical responsibilities to ensure there's no disruption in operations.

Check in with the team to address workload concerns and morale.

About iSpring

iSpring is a global eLearning expert and software provider. Since 2001, we've been developing result-driven online learning solutions that help businesses worldwide succeed through employee development.

20+ years in the industry	**10+ standalone** eLearning tools
60,000+ clients in 172 countries	**300+ partners** around the globe

Welcome to the iSpring Community!

Feel free to join and become a valuable part of a community of instructional designers and eLearning professionals who are taking training to the next level with iSpring.

Fast forward to the part of our community you like - just scan the relevant QR code.

iSpring Learning Exchange →

Connect with others in your field, ask questions, share your own expertise, and take part in discussions.

Blog →

Explore the exciting world of eLearning together with our helpful articles and how-tos.

Webinars →

Get eLearning tips and tricks from top-notch industry experts.

Guides →

Get step-by-step directions on how to create and launch eLearning.

YouTube →

Enjoy weekly eLearning videos and don't forget to subscribe.