

Offboarding Playbook – Starter Kit

A step-by-step guide for smooth, professional, and respectful employee exits.

1. Pre-Offboarding Preparation

- Manager Notification: confirm resignation in writing; align with HR on documentation; determine last working day.
- Internal Communication: notify HR, IT, Payroll, Legal; align team message with HR.
- Documentation: contracts, PTO balance, NDAs, performance docs.
- Stakeholder Alignment: HR, IT, Legal, Finance.

2. Employee Communication

- Exit Conversations: voluntary vs involuntary scripting.
- Exit Interview: scheduled final week, structured questions.
- Rehire Eligibility Policy: document and flag in system.
- Sensitive Exits: neutral HR facilitator, transition support.

3. Systems and Access Management

- Account Deactivation: restrict at notice, disable at exit, audit post-exit.
- Equipment Return: checklist (laptop, phone, badge, etc.).
- IT Security: reset passwords, revoke VPN/2FA, archive data.

4. Knowledge Transfer

- Documentation: handover template completed.
- Knowledge Sessions: at least two, recorded if possible.
- Team Alignment: manager sign-off.

5. Legal, Payroll, and Benefits

- Final Paycheck: issued per state law; include unpaid wages and PTO.
- PTO & Benefits: payout, COBRA, retirement/401k rollover.
- Legal Obligations: NDA, non-compete, IP reaffirmed.

6. Alumni Engagement & Brand Advocacy

- Exit Survey: digital, anonymous.
- Alumni Networks: LinkedIn, Slack groups.
- High Performers: exec thank-you, alumni invitation.

This playbook is intended as a practical HR guide. It is not legal advice. Always verify compliance with local/state labor laws and consult employment counsel for sensitive terminations. Want to customize your offboarding framework for your business? Let's build it together.