

THREE PHASE OFFBOARDING PLAN TEMPLATE

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PROCESS MONITOR / MENTOR	PHASE 1: PREPARATION	PHASE 2: DEPARTURE	PHASE 3: POST-DEPARTURE
EMPLOYEE	Submit resignation letter	Sign separation agreement Knowledge sharing Exit interviews Equipment return	Join alumni network Provide updated contact information
MANAGER or OFFICE ADMINISTRATOR	Notify key departments and personnel Send offboarding list to exiting employee Submit exit survey Review terms of agreement Update organizational chart	Delegation of tasks / assignments Succession planning Exit interview Ensure compliance Collect access cards and keys Leverage technology	Make use of exit interview information Boomerang planning Identify opportunities for development Encourage referrals Stay in communication Provide reference letter Analyze trends
HUMAN RESOURCES	Submit job termination request Organize farewell lunch or dinner Notify HR	Complete process documents Ensure compliance Final compensation Vacation status Review retirement and cobra benefits Provide development opportunities Confirm separation date Collect travel or credit cards Notify colleagues about exit	Maintain alumni network Make use of exit interview information Boomerang planning Encourage referrals Analyze trends
TECHNOLOGY		Revoke applications Revoke email access Revoke VPN Leverage technology Ensure compliance Remove individual from company website Leverage technology	Process improvement suggestions
DESIGNATED COWORKERS / PEER RESOURCE	Knowledge sharing and shadowing		Process improvement suggestions Maintain relationship
OTHER if applicable			