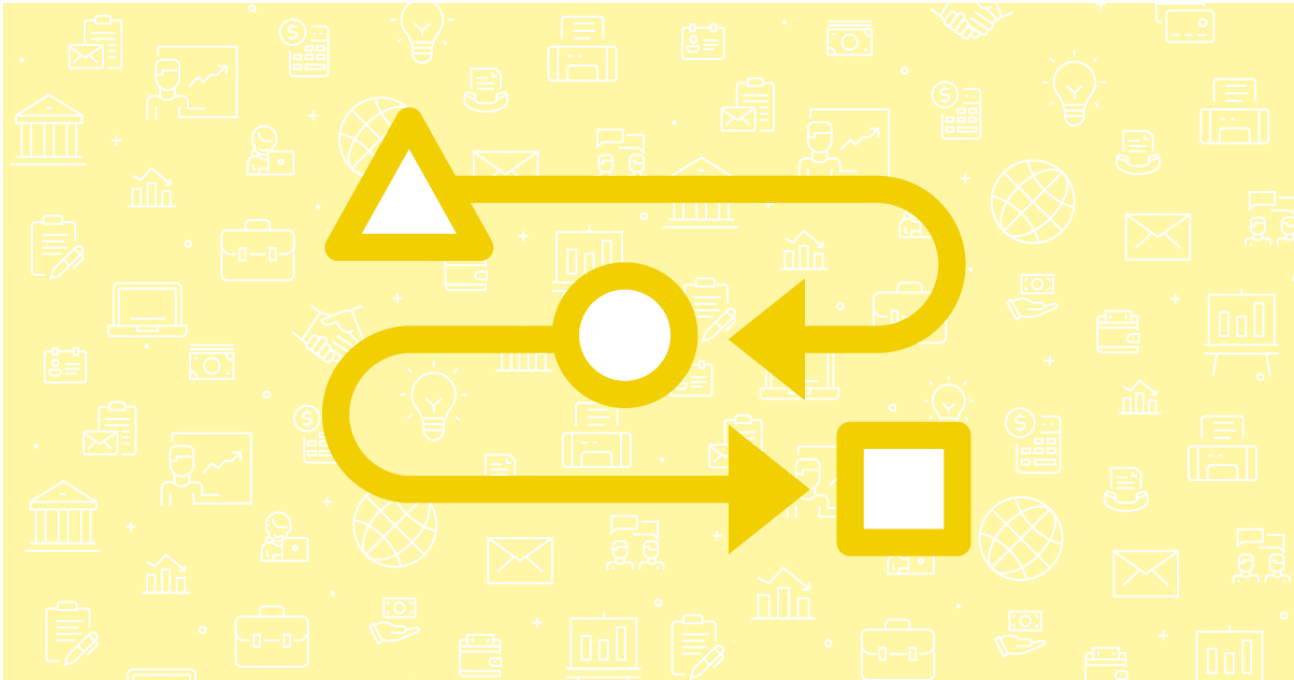


# Employee Off-Boarding Checklist

Each time you end a contract with an employee or freelancer, complete these processes to ensure a smooth and efficient off-boarding experience for your team member.



- Professional thank your employee or freelancer for their time and work (meeting, phone, email, etc) However you usually communicate with each team member
- Begin the knowledge transfer process
  - Gather employee client knowledge (VIP clients, current situations,etc)
  - Project knowledge
  - Daily routine
  - All logins and passwords
- Prepare off-boarding paperwork
  - Letter of resignation or termination
  - Non-disclosure and non-compete agreements
  - Employee benefits document(s)
- Recover all company assets
- Revoke access to all internal and external platforms and software
- Change passwords to all internal and external platforms and software
- Announce team members departure to the rest of the team or company
- Schedule an exit interview
- Plan a good-bye gift, lunch, card, etc for employee
- Update employee directory

- Begin transfer of responsibilities or onboarding of new employee
- Update payroll (send out last payroll check and end employment in payroll system)
- Write a letter of recommendation (if requested)
- End employment (change status of employee)
  - Remove employee from all communication forms
  - Remove employee from all upcoming meetings and projects
  - Update employment status with insurance provider, 401K, benefits, payouts, etc
- Close/file employee folder
- Clean employees desk and have desk area ready for future employee

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