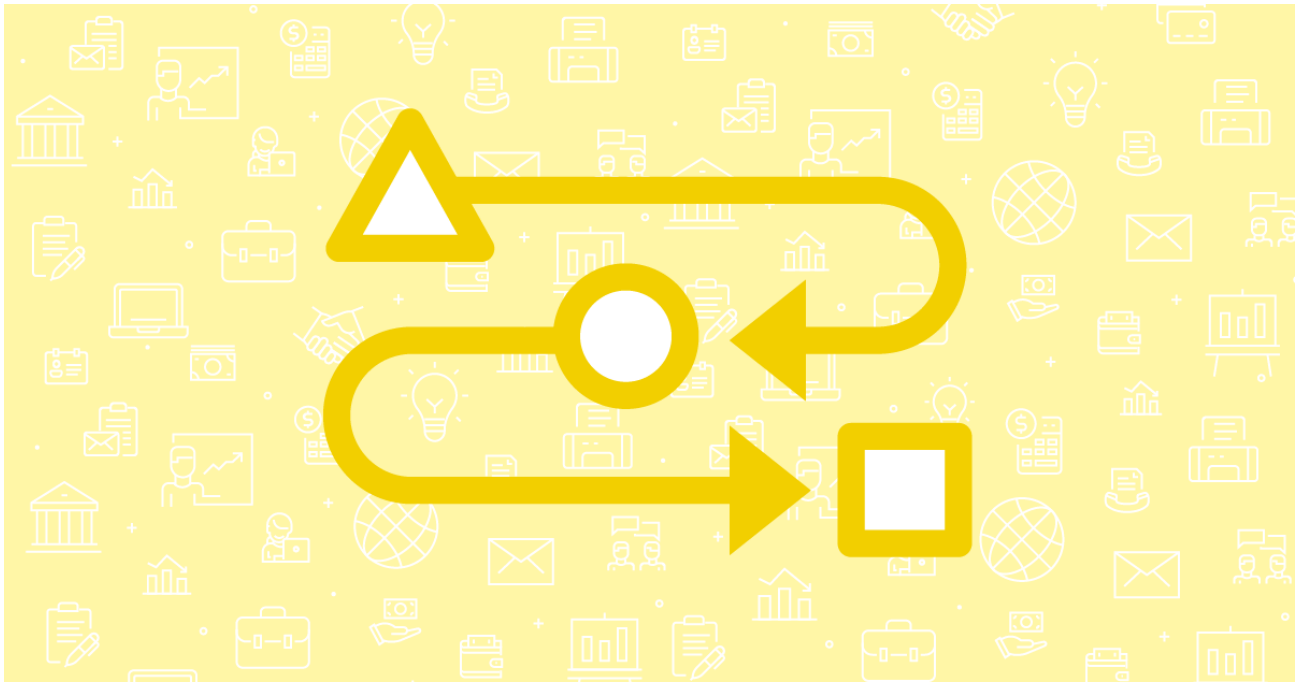
Employee Off-Boarding Checklist

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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