Offboarding Checklist



The last impression is just as important as the first. A professional offboarding process helps to make sure departing employees leave with a positive opinion. Done right, you turn them into brand ambassadors for your company.

Reasons for a professional exit management

- Strengthen your employer branding
- Expand your professional network
- Maintain a positive atmosphere in the company
- Minimise costs and risks (time, legal disputes, knowledge retention, etc.)



What you'll get

Our template contains the most important tasks for companies while offboarding employees.

The tasks are assigned to each phase of the offboarding process:

- 1st week after termination
- 2nd week before last day of work
- Last week of work
- Last working day
- After last working day

Offboarding Checklist

First Week After Termination

Task	Due Date	Responsible	
Notice of termination: Notice of termination has been received by employee / Confirmation of termination has been sent.			☐
Communication: Direct colleagues were informed about the departure.			☐
Vacation days: The remaining vacation entitlement was determined, taking into account the termination date and the notice period.			☐
Last working day: Based on the remaining leave days, the date of the last working day was determined and updated in relevant systems.			☐
ToDo list: Employee has received offboarding tasks in the form of a list or via a software solution.			☐
Create documents: A process has been initiated to create all required documents such as job reference, references or certificates in a timely manner.			☐
Inform stakeholders: All persons involved have been informed about the departure and know their tasks to be completed.			☐
Succession planning: It is clarified with the supervisor, whether the position should be filled. A corresponding process was initiated.			☐
			☐
			☐
			☐
			☐

Offboarding Checklist

2 weeks before the last working day

Task	Due Date	Responsible	
Vacation processing: Processing of open vacation entitlement has been discussed with the supervisor.			☐
Knowledge Transfer: A process for knowledge transfer has been defined and initiated with the supervisor.			☐
Communication: All relevant colleagues and departments have been informed about the departure.			☐
Team farewell: A team event has been planned with the closest colleagues.			☐
			☐
			☐
			☐

Offboarding Checklist

Last week

Task	Due Date	Responsible	
Exit interview: A final interview between the HR department and the employee has been scheduled.			☐
Employee appraisal: A final meeting between employee and supervisor has been scheduled.			☐
Contact: Different ways to stay in contact with the company after leaving have been offered to the employee.			☐
Company evaluation: Employee has been asked to provide a company review on relevant platforms (e.g. kununu, etc.).			☐
Data transfer: An overview with documents, important correspondences and accesses has been created and handed over to the supervisor.			☐
Knowledge Transfer: The transfer of the collected knowledge has been completed and is fully documented.			☐
			☐

Offboarding Checklist

Last day

Task	Due Date	Responsible	
Synchronize to-do list: All tasks have been discussed with the employee and marked as done.			☐
Certificates & Acknowledgements: All documents have been signed, stamped and handed over to the employee.			☐
Technical offboarding: The IT department and other responsible departments/colleagues have confirmed that equipment, furniture and work materials have been returned.			☐
Contact possibilities: All contact methods such as e-mail or telephone are forwarded to the supervisor.			☐
Accesses: All accesses to software and online services have been transferred and blocked.			☐
			☐
			☐

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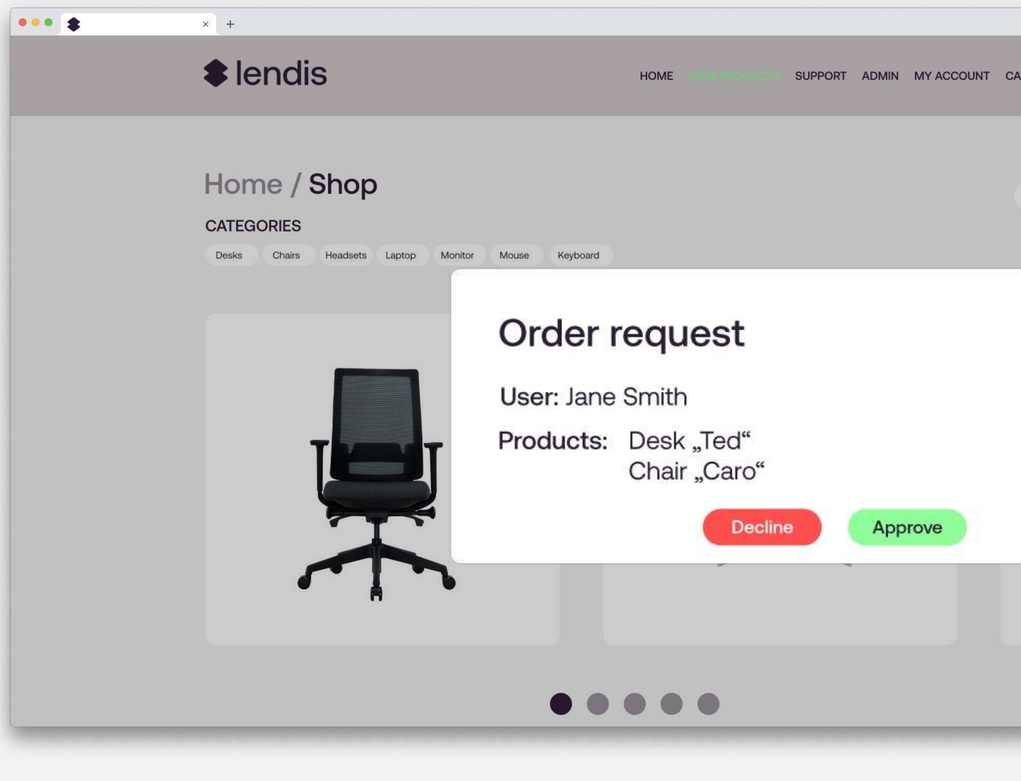
Offboarding Checklist

After the last working day

Task	Due Date	Responsible	
Final IT check: A follow-up check was done to make sure that all accesses are locked and transferred.			☐
External communication: All contacts (partners, customers, etc.) have been informed about the departure of the employee and a successor has been communicated.			☐
Re-Use: Returned appliances and furniture were disposed of, sold or reused sensibly.			☐
Process optimization: Feedback from employees was noted and is used to optimize processes.			☐
Update: All relevant places (internal Wiki, organizational chart, etc.) have been updated.			☐
			☐
			☐

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Lendis - advantages

Less admin, more time

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This is how Lendis OS makes your life easier

Before		Lendis OS
• Time spent of > 2 hours per employee • Numerous stakeholders involved in the process	Onboarding	• Time spent of less than 1 minute per employee • Admin keeps track of all orders automatically
• Real time inventory overview: None or rarely	Overview	• Information about amount and location of assets and devices anywhere, anytime
• Complex Organisation of asset delivery, assembly & utilization	Logistics	• Lendis takes care of all Logistic steps along the supply chain
• Buying: Very high one time payments for acquisition • Large amount of ‘dead capital’	Costs	• small rates through monthly subscription • 100% deductible rates
• Communication: Many stakeholders in the loop • Repairs or replacement of assets: very complex, time consuming process	Support	• We take care of all Service cases • Employees get in touch with their dedicated contact



The way to work.