

Automating Employee Offboarding

The importance of offboarding, to employees and organizations alike, cannot be understated.

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Section 01

Overview of Offboarding

The [Employee Offboarding Process](#) is a systematic way for organizations to manage an employee's departure, ensuring consistency and reducing organizational risk. This can be done manually through using something like an employee offboarding checklist, or it can be done through the use of offboarding software or workflows.

Offboarding, or employee exit management, is an essential and effective way to deal with a departing employee. It's a critical way to collect insights, knowledge, and perspective from the departing employee and ensure a smooth transition. This eBook will cover what offboarding is, the components, best practices, organizational benefits, and the future of employee offboarding.

What is Offboarding?

[Offboarding](#) is a process that can occur when an employee resigns or retires, but it can also be used when employees are laid off or even fired. It protects the employee and the organization and helps to, whenever possible, ensure that the employee leaves on good terms.

Employee offboarding is about tying up loose ends and providing closure for the employee. It can also be a way employers can protect themselves legally from any issues related to the departure or the employee's tenure.

What does offboarding entail?

While the specific structure of offboarding varies among organizations, the process has several standard elements. Offboarding is a meeting or series of meetings, along with actions, designed to achieve five key objectives:

1. Transferring knowledge
2. An exit interview
3. Completion of administrative tasks
4. Managing transition paperwork and documentation
5. Communication of the departure

While offboarding is essential for the organization and the employee, it also considerably impacts the corporate culture. Employees know that their insights and perspectives will be heard when they leave by providing a clearly defined offboarding process.

Section 02

Understanding Offboarding

Offboarding has a significant place in organizations of all kinds. Its importance to employees and organizations alike cannot be understated.

Significance of Offboarding

At its most fundamental, the process allows for a smooth transition for the departing employee and can improve the onboarding of a new employee. A positive offboarding experience also can establish the potential for the employee to return to the organization.

Departing employees have a wealth of information that can help shape operations and HR approaches. Their insights on their jobs can help their successors and former colleagues manage their work more effectively.

Often, employees may tweak procedures or processes that enhance efficiency. The offboarding process is an excellent way to understand these nuances.

For organizations, the offboarding process can provide valuable insights. Often, departing employees will be more candid about what works and doesn't work within the organization. Understanding why an employee leaves allows one to learn and understand what can be changed to improve the employee experience.

Offboarding vs. Onboarding

There are many differences between offboarding, which occurs at the end of the employee cycle, and [employee onboarding](#), which arises as a worker starts their role. Both are essential processes that provide a framework and context for the employee. They are also important moments when the organization can demonstrate the corporate values to which it ascribes.

Both processes usually require extensive reviews of policies and the completion of paperwork. For example, at the onboarding stage, employees complete benefits enrollment forms work eligibility paperwork, review and agree to abide by policies, and receive equipment.

On the other hand, during offboarding, paperwork may entail address forwarding, calculation of owed salary, wages, or other earnings, and information on the continuation or cessation of benefits. Information on noncompete agreements, unemployment benefits, and other specific items may also be reviewed. Employee-issued equipment may be retrieved.

The Role of HR and Management in the Offboarding Process

Both human resources staff and management are typically involved in different aspects of the offboarding process. Managers, for example, may handle the process's knowledge transfer and communication aspects. HR staff are more likely to manage the paperwork and conduct the exit interview.

Signs of a Risky Employee Offboarding Process

- Workers with access to secure, critical systems post-termination can wreak havoc on the organization's systems.
- Failure to follow proper termination procedures can lead to litigation and leave companies scrambling for documentation and confirmation of processes being followed.
- Assets can be inadvertently left with the departing employee and are difficult to retrieve later.
- Communication breakdowns can lead to procedural gaps and headaches for employees and management alike.
- [Knowledge transfer](#), either person-to-person or person-to-system, can be missed and leave departments at risk.
- Other departments (finance, payroll, IT, etc.) can be left out of the loop, leading to delays and confusion.

These are all worst-case scenarios, but all it takes is one poorly managed **employee offboarding procedure to cause severe disruption and financial loss to a business.**

And yet, despite the mounting risks of not correctly offboarding employees, surveys indicate many organizations are leaving gaps in their processes.

- [A survey by security firm Cyber-Ark](#) found "88 percent of information technology workers would take sensitive data with them or abscond with company passwords if they were fired".
- Another survey found that "50% of ex-employees can still access corporate apps."

Section 03

The Components of Offboarding

The components of employee offboarding can vary from organization to organization. However, here are the most common:

Exit Interviews

The exit interview is an opportunity to gather insights from the departing employee about all aspects of the work. These insights can run the gamut from leadership and feedback provided by the supervisor to company culture and workplace concerns.

The interview can provide information about what the organization does well, what needs to be improved, and what the employee's experience has been working for the organization.

Feedback from the interview can provide information about workload, working conditions, leadership, compensation, and work-life balance. Asking the right questions helps to glean information that can be quantified, analyzed, and used to improve the experiences of other employees.

Here are some sample exit interview questions to consider:

- What did you like best about your job?
- What did you dislike about your job?
- What was your relationship like with your supervisor? Your coworkers?
- Did the job meet your expectations? Why or why not?
- What about the company culture can we improve?

Remember that the exit interview will be one of the employee's last experiences with your organization. It's essential to close the loop on the employee's experience.

Knowledge Transfer

Transferring insights, expertise, experiences, and skills is a critical offboarding component. Knowledge transfer prevents the loss of practical information that could disappear once the employee leaves. This step is particularly crucial if a replacement is not hired before the employee's departure.

A knowledge transfer can begin with the employee detailing their tasks and responsibilities. A supervisor can then review the document with the employee to gather clarity or more details, if necessary.

Here are some key considerations to factor into the knowledge transfer process:

- The daily work routine and how they prioritize and manage the work
- Files and software used, organization of documents, and location of that information
- Key collaborators, both internal and external
- Systems that need training by a replacement or someone else
- Transfer of ownership of Google Drive or other file systems
- A running list of current, annual, or seasonal projects and tasks and whether they will be completed before the departure

By using documentation and technology, you can ensure a seamless transition from one employee to the next.

Administrative Tasks

Collecting any company property distributed, including laptops, smartphones, tablets, passes, memberships, and keys, is essential.

Here, any legal obligations, such as ownership interests, stock options, or other contractual obligations, are addressed. Ensuring no questions about responsibilities can eliminate problems down the road.

Managing paperwork and documentation

Paperwork and documentation are extensive in offboarding. Information about benefits, nondisclosure agreements, return of company property, and other details needs to be shared and, in some cases, signed by employees and company officials.

Communication

Communication is essential when an employee leaves. The tenor, content, and voice of the communications are crucial. Different types of communication may be necessary for other constituents, all timed carefully.

Communication audiences include closest colleagues or the department, organization-wide communications, and notices sent to stakeholders, customers, and partners.

Developing sensitive, professional departure announcements that provide appropriate detail is essential. Sometimes, sharing drafts of departure notices with the employee may be prudent.

Section 04

Offboarding Best Practices

Finding the right approach to your offboarding requires an organizational commitment to getting it right. Here are a few considerations:

Automate Forms, Tasks, Workflow

By using a [workflow automation platform](#) to create online forms, assign tasks, and automate offboarding workflow, you can ensure that all the critical steps of the process happen as expected in a consistent, standardized way. Use alerts, reminders, and escalations to enforce turnaround time requirements. Digitally store all forms and information to ensure retention of records and integrate them with your HRIS system. Provide a complete activity audit trail when required by legal or regulatory requirements.

Tailor Offboarding to Different Scenarios

The steps taken in offboarding will vary significantly based on the types of departures and the circumstances surrounding the exit. Not all steps are appropriate for certain leaves. For example, exit interviews with fired employees may not be appreciated or accepted.

Many experts recommend following the same process, no matter the separation type. However, consider developing specific offboarding strategies for voluntary vs. involuntary departures. In a forced leave, for example, team members may be surprised and emotional, worried about the impact on them and their work.

Additional steps may be necessary for retirement and phased exits, especially when retirement celebrations are planned.

Offboarding remote or contract employees has its nuanced components. Equipment, for example, may need to be returned via a shipping service with prepaid shipping labels.

Develop an Offboarding Strategy

The critical thing to remember is to create a standardized offboarding process shared with employees and managers. Manager training should include what an offboarding method comprises and the manager's role.

While a standardized process is wise, it's also important to maintain flexibility and adaptability in offboarding approaches. Consistency is essential, but so is adapting to different scenarios that may require a more nuanced approach.

One of the elements that organizations often forget is to use the information gained in the offboarding process. Offboarding provides incredibly detailed data that can be analyzed and used to foster continuous improvement in the employee lifecycle.

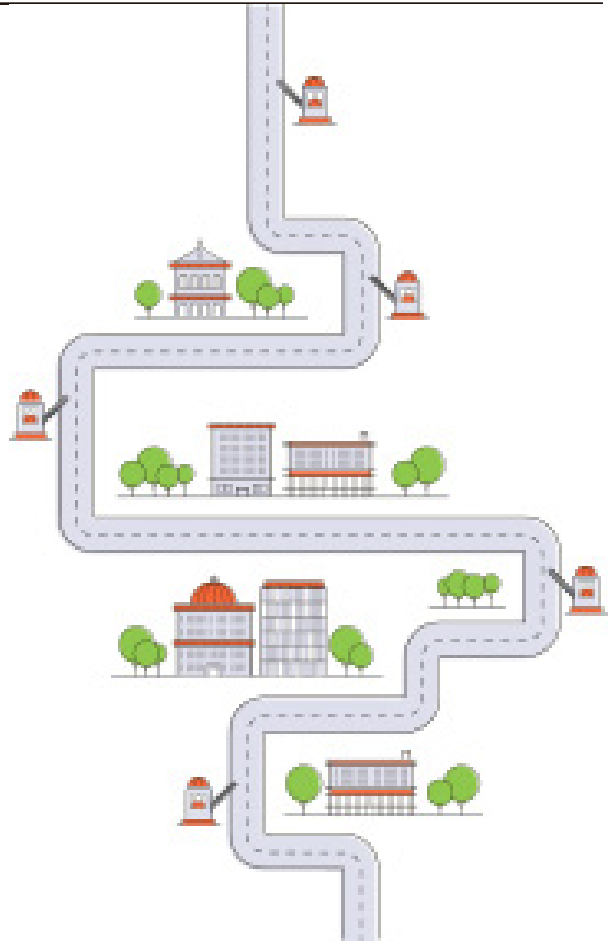
Legal and Compliance Considerations

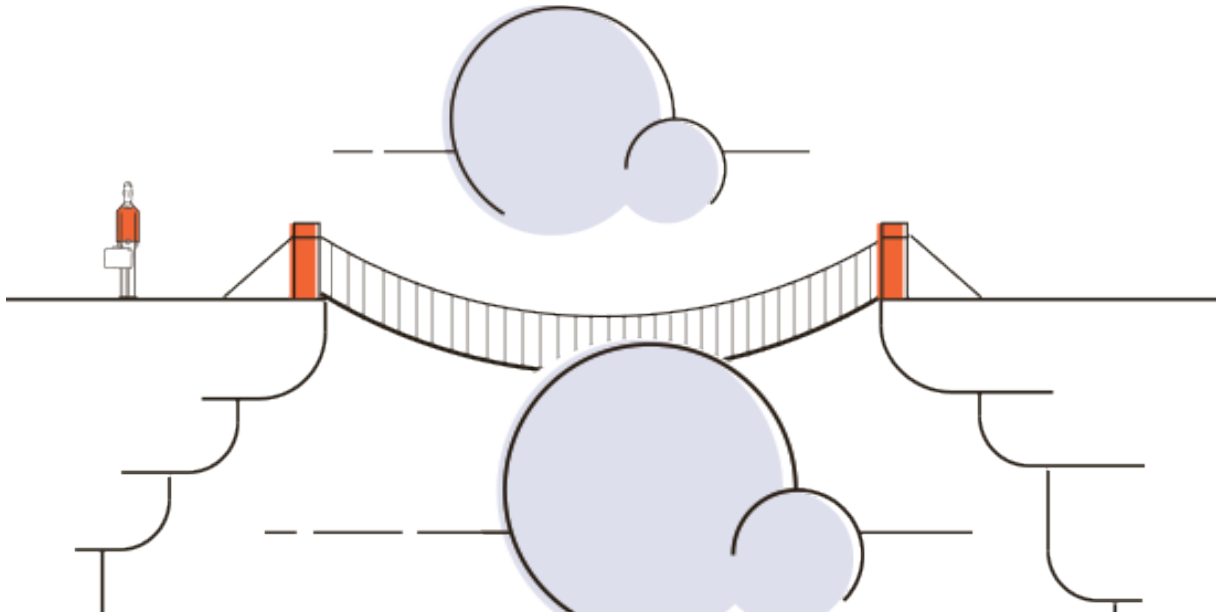
Employees must know that exit interviews are not legally required and that you will not force an employee to complete one. The only exception is if participation is part of an employment contract.

Many employees are reticent to participate for fear of reprisals. You can assure employees that information provided during an interview will not be shared with others unless legally mandated.

Legal elements come into play in several components of offboarding. Protecting sensitive company information, including intellectual property, is crucial and ensuring that the employee does not take it. This scenario is especially true when the employee is departing for a competitor.

If there are non-compete clauses or confidentiality agreements in play, the offboarding process is an excellent time to review the conditions of said agreements.





Section
05

The Organizational Benefits to Effective Offboarding

There are many benefits to having a sound offboarding strategy, including:

- **Preserving Institutional Knowledge:** Offboarding allows the organization to retain the departing employee's crucial skills, insights, and work expertise.
- **Enhancing Employer Branding:** A commitment to offboarding shows current and potential employees that the organization is committed to them and their welfare throughout their employment tenure. The process demonstrates a commitment to best HR practices.
- **Reducing Loss and Damage:** Employers can reduce the risk of damaged, lost, or stolen assets and intellectual property by having a well-thought-out offboarding process. For example, many organizations restrict or remove access to sensitive company systems when the employee is notified of a departure or gives notice.
- **Mitigating Legal and Reputational Risks:** The offboarding steps ensure that all critical legal points are covered and that the risks of legal exposure and loss of reputation are reduced.

This Guide is Sponsored by Integrify

Quickly automate **any form**
or process without code and
improve your workflow.



Section 06

How Should I Automate the Offboarding Process?

Many other parts of the offboarding process should be automated to prevent lapses and ensure policy consistency. Here are our recommendations on what to include:

- Create an [employee offboarding checklist](#) that includes all the potential items, access credentials, keys, accounts, etc., that an employee might have.
- Provide human-initiated termination approvals to avoid the [process moving forward unchecked](#).
- Ensure performance evaluations, disciplinary action forms, and other employee records are in order.
- Decommissioning of access cards and keys.
- Identification and return of company-provided property, including hardware and mobile devices.
- Avoid potential lawsuits by ensuring compliance procedures are followed and documented across all locations.
- Provide access to local, network, and cloud-based files and email for the former employee's supervisor.
- Notification of stakeholders (IT, Finance, leadership, etc.)
- Retention of specific technological resources, data, and logs if the former employee or company itself decides to pursue litigation.
- Ensuring that terminated employees no longer collect wages or benefits past their date of separation.
- Ensure receipt of paperwork (non-disclosure, etc.)
- Conduct exit interviews or surveys.
- Confirm that information about insurance continuation (COBRA), retirement fund withdrawals, and other benefits matters were discussed.

Ultimately, the benefits of an [automated offboarding process](#) are numerous and, combined with a thoughtful, automated onboarding process, can ensure consistency, accuracy, and compliance.

Workflow Automation Process Example

Here is an Integrify Process App example of how we would handle an employee offboarding automated process. This process app provides an example of how an employee offboarding process can be designed to ensure no missed steps.

Forms


Initial Offboarding Form:


▼ Section

▼ 1-Col Container

Name

Proposed Last Date of Employment With Our Organization

 . . . ▼

Attach Resignation Letter Here 

Exit Interview Form:

▼ Section

▼ 1-Col Container

All Organizational Items Collected and Accounted For?

Yes No

Please List Items Missing - Reason - Expected Date of Return

Attach Exit Interview Here 

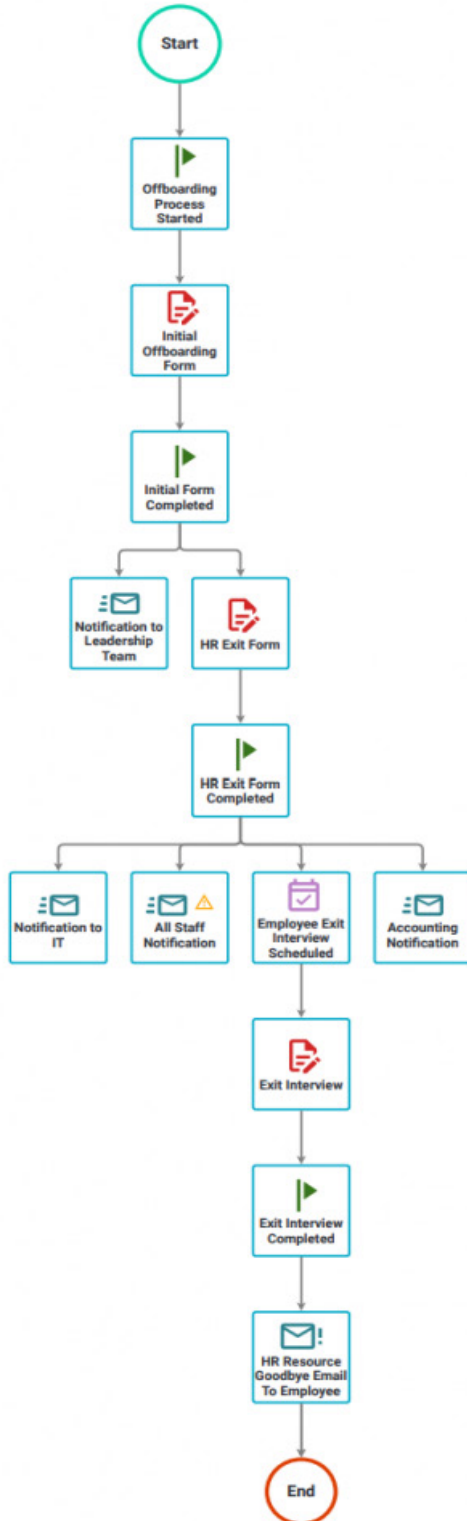
Individual's Personal Email Address

Forms

HR Exit Form:

<p>▼ Areas of Organization That Employee May Have Assets That Need To Be Collected</p> <p>▼ 1-Col Container</p> <p>Select All Areas That Employee Has Assets or Access To Organizational Materials</p> <p><input type="checkbox"/> Buildings & Grounds <input type="checkbox"/> Finance <input type="checkbox"/> IT <input type="checkbox"/> Sales <input type="checkbox"/> Miscellaneous</p>
<p>▼ Building & Grounds</p> <p>▼ 1-Col Container</p> <p>Materials Needed To Be Collected</p> <p><input type="checkbox"/> Building Key <input type="checkbox"/> Key Card <input type="checkbox"/> Parking Pass <input type="checkbox"/> Other (fill out in comments below)</p> <p>If Other Was Selected, Please Elaborate Here</p>
<p>▼ Finance</p> <p>▼ 1-Col Container</p> <p>Materials Needed To Be Collected</p> <p><input type="checkbox"/> Company Credit Card <input type="checkbox"/> Company Vehicle <input type="checkbox"/> Company Uniform <input type="checkbox"/> Other (Fill Out Comments Below)</p> <p>If Other Was Selected, Please Elaborate Here</p>
<p>▼ Information Technology</p> <p>▼ 1-Col Container</p> <p>Materials Needed To Be Collected</p> <p><input type="checkbox"/> Laptop <input type="checkbox"/> Tablet <input type="checkbox"/> Cell Phone <input type="checkbox"/> Other (Fill Out Comments Below)</p> <p>If Other Was Selected, Please Elaborate Here</p>
<p>▼ Sales</p> <p>▼ 1-Col Container</p> <p>Materials Needed To Be Collected</p> <p><input type="checkbox"/> Home Office Printer <input type="checkbox"/> Home Office Chair <input type="checkbox"/> Tollway Pass <input type="checkbox"/> Other (Fill Out Comments Below)</p>
<p>▼ Miscellaneous</p>

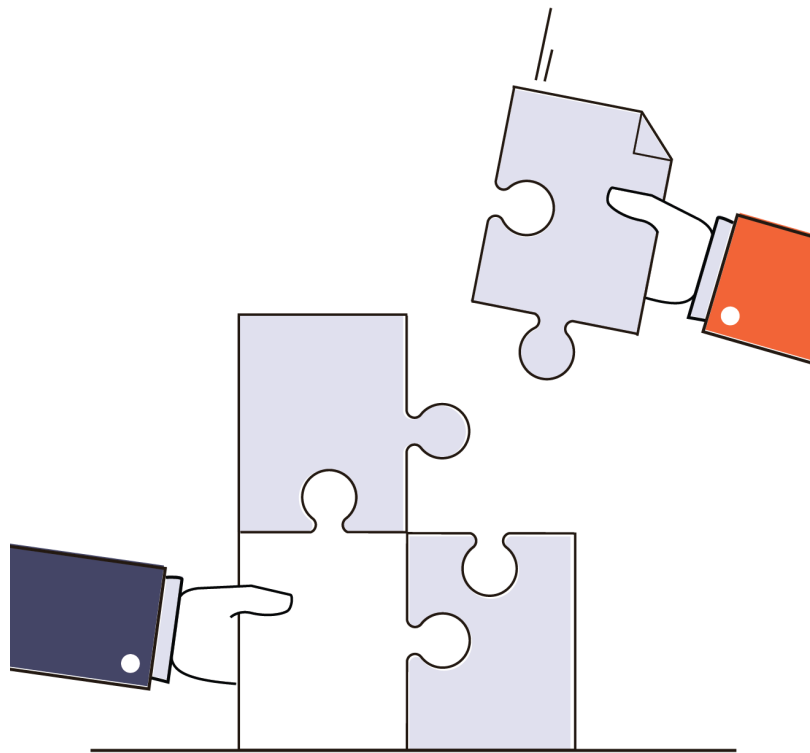
Process



Not Ready to Automate Yet?

If you're not ready to go full-on with automation, you can download our Offboarding Checklist to get a jump on documenting your process and improving compliance.

- [Download the Employee Offboarding Checklist \(PDF\)](#)



Section 07

Conclusion

Offboarding is an essential component of the employee lifecycle. It provides closure, insights, and details that can help improve the organization extensively.

Organizations can boost employee engagement and employer brand reputations by taking a compassionate, proactive approach to employee departures. When done right, offboarding can be a satisfying conclusion to an employee's tenure.

Ultimately, the benefits of automated the offboarding process are numerous and, combined with a thoughtful, automated onboarding process, can ensure consistency, accuracy, and compliance for the employee lifecycle.

About Integrify



Our Story

Integrify has been a leader in request and approval workflow management for over twenty years. Launched in 2001, with headquarters in Chicago, we've built a reputation for creating software with the customer in mind.

Users value simplicity and integration. That has always been the focus of our product. Rapid distribution, broad scalability, and high ROI are goals that we are constantly reaching, only to set the bar again even higher.

Our Mission

Our job is to ensure customer success by helping them do more efficiently. We are constantly innovating to provide compelling, simple, and adaptable solutions. We believe we can work with customers to build solutions to buck the status quo and make organizations more productive.

Interested in Automating Your Workflow?

We have a variety of resources to help you on your journey to an automated workflow.

- [Request a Demo](#)
- [Workflow Tools and other eBooks](#)
- [Recorded Demos of our Workflow Automation Software](#)
- [2-Minute Quick Demo](#)
- [Why Choose Integrify](#)
- [Building an Automated Process in Under 5 Minutes](#)

Integrify customers have automated a wide variety of simple and complex workflows. See the next page for a list of processes that Integrify has helped our customers automate. You can also [download our Use Case sheet from our website](#).

Use Case Examples

IT/IS

[IT Service Requests](#)

[Security Access Requests](#)

New Account Setup

[Change Requests](#)

[New Project Requests](#)

[Security Incidents](#)

Finance

[CapEx/AFE Requests](#)

Expense Approvals

Salary/Wage Changes

[AP Automation](#)

[Grant Management](#)

Marketing

Campaign Approvals

[Collateral Approvals](#)

Brand Management

Facilities

Office Relocations

Resource Scheduling

Facility Access

Move Requests

Sales

Quote Approvals

Pricing Discounts

Proposal Approvals

Product Discounts

Legal

Legal Holds

[Contract Reviews](#)

[Client Intake](#)

HR

Benefits Changes

[Timesheet Approvals](#)

[New Hire Management](#)

[Employee Onboarding](#)

[Employee Offboarding](#)

Vacation Requests

Purchasing

[Procurement Process](#)

[Capital Approvals](#)

[Vendor Management](#)

[Invoice Approvals](#)

Product Pricing

Operations

[Complaint Management](#)

Maintenance Request

New Product Request

