

How your business should correctly manage the offboarding process

As a business owner, onboarding new employees correctly is essential to productivity, job satisfaction and staff retention. Having a solid policy when it comes to onboarding is vital to the employee's success at your organisation, however, when it comes to employees leaving your business, many employers neglect the offboarding process.

The employee offboarding process can equally offer important insights for employers that they wouldn't receive in any other circumstances. It can also help prepare remaining staff to pick up the remaining workload in the interim.

Talk to a member of Croner's HR advisory team for advice on how to create your business's own employee offboarding process and policy.

Call your dedicated advice line today on 0800 022 3820 and quote 932613.

What is employee offboarding?

Employee offboarding is the process by which a departing employee transition away from their employer's business. During this period their manager should put into place a process by which the employee can leave on good terms with minimal disruption to the business and at the same gain valuable insights for future reference.

What are the best practices for employee offboarding?

Both management and HR should lead employee offboarding. HR should be responsible for the necessary paperwork and legal processes involved with an employee leaving the company. At the same time, the employee's manager should facilitate the offboarding process, as they will have gained a close working relationship with the employee and can help field any questions or mediate any issues that may arise as the employee prepares to exit the business.

What are the benefits of offboarding an employee?

There are several benefits to offboarding an employee using a detailed and methodical process, these are:

- Improved employee experience.
- Enhanced employer brand.
- The potential to welcome back former staff (boomerang employees).
- Reduces risk to security and data protection.
- Gain insight for overall improvement.

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Treat the offboarding process much like the onboarding process

Much like the support offered when your employee first started, you should offer the same due care and attention to their offboarding. This not only retains a feeling of trust but can also help uncover any underlying issues, or reasons for their departure. This could include reasons like workplace culture etc. Hopefully, this will mean that your employee transitions away from the company on good terms and provides feedback you can use to improve in the future.

Wrap up and handover workflows

What responsibilities does your employee currently have in terms of workflow? Do they manage other employees and are they currently involved in any pending projects? You should take the time to discuss this with them and how best to proceed. This ensures that work can be picked up by others and that any process they've managed can be handed over to another member of the team, minimising any negative impacts on productivity.

Some of the key things to document in this process are:

- The transferring of handover documentation, management tools and spreadsheets etc.
- Documenting tasks completed and those left outstanding
- Make note of any undocumented processes that is part of their daily work

Ensure the administration process is kept up to date

Confirm with your HR team and legal team that the employee has the necessary documentation etc, to successfully offboard. HR can then provide a walkthrough of admin tasks that the employee will need to undertake.

There may be certain parts of the departing employee's role that involve sensitive digital information, so you should be sure to check with your IT department (or provider) that they are aware of the offboarding process, as they may have to remove access to password protected drives and accounts among others.

Other typical employee offboarding administration includes:

- Notifying payroll and finalising payments etc.
- Ensuring that any employee benefits that can't be continued are closed off.
- Finalising paperwork including any documentation like non-disclosure, if necessary.
- Returning any company inventory like laptops and I.D. badges.
- Scheduling an exit interview.

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Setting up the exit interview for offboarding an employee

Typically, this is set up by the HR department and conducted by a HR professional. Exit interviews are an extremely useful way to gain insight, as, because the employee is exiting the company, the feedback is likely to be honest. This should be seen as an opportunity to improve the employee experience and further improve staff retention. It can also be used to highlight any concerns of deeper issues within the company culture that might be contributing to poor retention and employee experiences.

What questions should I ask at an exit interview?

- Overall, how would you rate your experience at the company?
- How can we better support new employees?
- What prompted you to look for a new opportunity elsewhere?
- What opportunities, if any would you like to have seen in the company?
- What made working in our organisation a positive experience?
- Were there any negative experiences whilst working here that we could improve upon?
- Did you feel supported by your manager and the company?
- What was your best achievement as an employee?
- What was worst your moment as an employee here?
- Would you recommend our company as a place to work to a friend?

Develop an interim plan until a new hire is in place

You will need to formulate a plan with the remaining team to absorb the workload of the departing employee, or identify which tasks or projects can be paused in the meantime. This is most relevant in cases where an employee leaves to pursue another opportunity.

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In cases where there is a redundancy, you should still work out a plan to move forward, however this will likely be a permanent plan to spread the additional work amongst the remaining work force. A change management plan might be more appropriate here.

Work on a hiring strategy

If your business plans to refill the vacated position, then you should review your hiring process to ensure the most qualified candidates for the vacancy.

Need advice on the employee offboarding process?

The HR experts at Croner can advise you on the best possible steps to take when offboarding an employee and provide a solution to ensure that all your documentation and agreements are legally compliant and above board.

With over 80 years' experience in providing businesses with bespoke HR, employment law and Health and Safety solutions, we're on hand 24/7 to assist your members with expert, professional advice.

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