Sora's employee experience guide to

Voluntary Employee Offboarding

When an employee gives notice

When an employee resigns from their position, building a seamless offboarding process is the best way to end things on the highest note possible. Showing your gratitude for all the time and energy they've dedicated to your company is not just the right thing to do but it also boosts the morale of your current employees.

Your resigning employees will most likely keep in touch with your current employees, so it's crucial for them to leave on good terms. You also don't want to put a bad taste in any resigning employees' mouths, which could lead to a negative review on Glassdoor.

Additionally, offboarding mistakes are much less forgiving than onboarding mistakes. Once your employees are gone, they're gone.

If a new hire isn't able to go over their 30-60-90 plan during the first week of onboarding, it isn't ideal, but they can get to it the next week. However, if a resigning employee leaves before they finish their knowledge transfer document, then the person taking over their role will be left high and dry.

Developing a robust offboarding process is a mutually beneficial initiative for both employees and companies. Fortunately, we've crafted a template that you can build off of to create an offboarding process that works best for your company.

The day the employee gives notice

The day the employee gives notice

- [ ] Complete offboarding intake form

- [ ] Send termination info to stakeholders

- [ ] Update HR and payroll systems

- [ ] Upload resignation email

DAY EMPLOYEE GIVES NOTICE

📋 Offboarding intake form

Your resigning employee's manager can build a survey that collects offboarding details like the date of their employee's last day at the company. If they have this date in writing, then they know exactly how much time they have to execute their offboarding workflow, which makes things easier for everyone.

💬 Send termination info to stakeholders

Notifying other key stakeholders – like other managers, HR, IT, and payroll – of these important offboarding details through an email ensures that everyone is in the loop and gives them plenty of time to prepare for the task they'll be responsible for in the offboarding workflow.

You also don't want your current employees to hear about any resignations through the grapevine before they hear it from internal communications. Workplace gossip is toxic and destructive and almost impossible to tame.

DAY EMPLOYEE GIVES NOTICE

🗃️ Upload resignation email

Assigning the manager of your resigning employee to upload their employee's resignation email into your HRIS will allow your company to keep an official record of their termination.

🗂️ Update HR and payroll systems

Inputting your resigning employee's last day into your HR and payroll systems will allow payroll to send them their final paycheck on time and avoid overpaying them after they officially leave the company.

The day after resignation notice

The day after resignation notice

- [ ] Start knowledge transfer document

- [ ] Ship laptop box with prepaid return label

- [ ] Begin backfill process

- [ ] Account termination preparation

- [ ] Create offboarding date reminder

DAY AFTER RESIGNATION NOTICE

📖 Start knowledge transfer document

Whether your resigning employee has worked at your company for a year or five years, passing down the knowledge they've accumulated to their replacement is crucial for them to get up to speed. One of your resigning employee's last tasks can be creating a knowledge transfer document so no precious information is lost forever.

📦 Ship laptop box with prepaid return label

If your resigning employee is remote, have them fill out their address in a survey so you can ship out a laptop box and a prepaid return label to them as soon as possible. It will ensure that they'll be able to send back their equipment to you right after their last day.

In Sora, one of the steps that you can add to your offboarding workflow is an automated email that informs your resigning employee that their box and label are on the way. It will trigger right after you ship these items and mark the task complete.

After your resigning employee ships their equipment back to you, their hiring manager can check off that they have received these items.

DAY AFTER RESIGNATION NOTICE

👷‍♀️ Begin backfill process

The offboarding process doesn't just transition your resigning employee out of the company. It also kicks off the workflow that retains their knowledge of their role and replaces them with a new job candidate. Starting this process during offboarding will get your team back to 100% as quickly as possible.

🔧 Account termination preparation

By preparing to remove your resigning employee from your company's systems and workflows right away, you won't have to scramble to take away access to their accounts after they've left the company. This task can consist of cataloging each platform that they have logins on.

DAY AFTER RESIGNATION NOTICE

🗒️ Create offboarding date reminder

Reminding every key stakeholder of your employee's last day at the company through a private calendar event will give them ample time to plan, execute, and finalize any of the tasks they're responsible for in your offboarding workflow.

It will also ensure that they can say goodbye to your resigning employee and even schedule a final get-together for them. As we mentioned before, it's ideal to send your resigning employee off with a heartfelt farewell.

One week before employee's last day

One week before employee's last day

☐ Transition work

☐ Offboarding survey

☐ Exit interview

☐ Notify team

☐ If applicable, pay commissions

ONE WEEK BEFORE EMPLOYEE'S LAST DAY

💼 Transition work

A week before your resigning employee leaves the company, you can create a task for their hiring manager to allocate their duties to the appropriate members of their team when you're in the process of hiring their replacement. Ideally, the people on their team will get an even distribution of these new tasks. You can even have your resigning employee show their teammates the ropes and get them up to speed before their last day.

📋 Offboarding survey

When building your offboarding survey, think of it as a primer for your exit interview. We recommend building a survey that is either open-form or multiple-choice. Open-form will obviously allow for more elaboration than a multiple-choice form but the latter will be easier and faster to complete. Regardless, you can still ask open-ended questions during your exit interview.

ONE WEEK BEFORE EMPLOYEE'S LAST DAY

💬 Exit Interview

After your resigning employee fills out their offboarding survey, have your people team schedule an exit interview with them. The earlier you get this meeting on the books, the better. The exit interview is crucial for learning how to improve your company's employee experience.

📣 Notify team

On the day of your employee's resignation, their hiring manager will ideally inform their team about them leaving the company. During this stage of the offboarding process, consider having their hiring manager remind the team of your resigning employee's last day and schedule a team happy hour on that day or a day that works best for everyone.

💰 If applicable, pay commissions

If your resigning employee works in a commission-earning role, you must pay them out on their last day at your company, at the latest. Assign this task to their hiring manager.

On employee's last day

Employee's last day

☐ Remove personal info from laptop

☐ Deprovision accounts

☐ Collect tech equipment

☐ Thank you email

☐ Remove employee dates from calendars

EMPLOYEE'S LAST DAY

🔍 Remove personal info from laptop

One of your resigning employee's last tasks will be to remove their work laptop from their personal Apple ID, so they can't track its location anymore. Your employee can do this through the Find My App on their iPhone.

🔧 Deprovision accounts

After your resigning employee clocks out for the very last time, it's ideal to take away access to their accounts on all of your platforms immediately. If you can't get to it right away, though, try to shoot for the next day at the latest.

💻 Collect tech equipment

If your resigning employee is in the office, make sure to have someone from IT collect their laptop, keyboard, monitor, or any company-provided equipment at the end of their last day.

EMPLOYEE'S LAST DAY

🙇‍♀️ Thank you email

Gratitude goes a long way. Your resigning employee has dedicated a ton of time and energy to your company and worked hand in hand with their hiring manager to help achieve their team's goals. Make sure they write a thoughtful, genuine "Thank You" email that will make a lasting impression!

📅 Remove employee dates from calendars

The last step of the offboarding process is removing your resigning employee's birthday and work anniversary from your team calendar. There's no rush to complete this task, but it's ideal to do it within a week of your employee's departure so you can tie up loose ends.

Sora workflow template

NOTICE GIVEN

SURVEY
📋 **Offboarding intake**

EMAIL
📫 **Stakeholders timeline**

ASSIGNMENT
🗃️ **Upload resignation**

INTEGRATION
🗂️ **Sync to HR system**

1 DAY AFTER NOTICE GIVEN

ASSIGNMENT
📖 **Knowledge transfer**

ASSIGNMENT
📦 **Ship laptop**

ASSIGNMENT
📋 **Open backfill**

SURVEY
🔧 **Tools to deprovision**

CALENDAR
📅 **Offboarding reminder**

1 WEEK BEFORE LAST DAY

ASSIGNMENT
💼 **Transition work**

SURVEY
📋 **Offboarding survey**

CALENDAR
🤝 **Exit interview**

SLACK
Notify teammates

ASSIGNMENT
💰 **Pay commissions**

LAST DAY

ASSIGNMENT
🔍 **Remove personal info**

INTEGRATION
🔒 **Deprovision accounts**

ASSIGNMENT
💻 **Collect equipment**

EMAIL
🙏 **Thanks email**

ASSIGNMENT
💰 **Pay commissions**

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