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# e2r Alert!

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## Exit Checklists – A Powerful Tool!

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We have all been there, an employee submits their resignation, and the chaos begins as we try to work through the shock and logistics of the departure. Having a solid exit process can support an organization during this time by removing the risks of something being missed, ensuring that work can continue and providing a more positive employee experience for all those involved.

Exit Checklists are a great tool that can lead the exit process by ensuring all individuals and departments know what needs to be done. Depending on your organization size and structure, and the type of the exit, the checklist could look a bit different. Here are some prompting questions to consider when you are building your checklist:

- Who is responsible for receiving and acknowledging a resignation letter? Does it need to be sent to HR or an Office Manager?
- What will the transition plan look like? How will the work be reassigned temporarily or on a permanent basis?
- When should internal and external stakeholders be notified?
- How will the organization collect equipment (laptop, phones, keys, passes, etc.)?
- When will payroll be notified? Who will calculate if there are any final payouts/deductions and issue the ROE?
- Who will notify the benefits/pension providers?
- Will an Exit Interview be conducted? Should this be done internally or externally? [Exit interviews can give you insight into internal issues that you otherwise would have no knowledge of, including issues that require immediate attention. This may allow you to go from 'exit' to 'retention' with your remaining staff!]
- How will employee access to organization systems/spaces be blocked (ex. email, building, websites, etc.)?
- What important information does an employee need (ex. last day of benefits, sign off on any deductions, etc.) when exiting?

Ensuring that the exit process runs smoothly is just as important as having a solid onboarding process for the effective running of your organization. To support with this, e2r™ has curated a sample exit checklist that you can access on your Member Portal. Feel free to download and customize to fit your company's practices.

As always, if you have any questions regarding your specific situation or would like help building your exit process, please do not hesitate to reach out to speak with an e2r™ Advisor.

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