EOS Core Process: Employee Offboarding and Transition

Process Owner: [Person from EOS Accountability Chart]
Last Updated: [Date]
Review Date: [Next quarterly review date]

EOS Integration

Connected EOS Tools:
Related EOS Rocks: [Current quarter Rocks that improve this process]
EOS Scorecard Metrics: [Weekly numbers tracked for this process]
Accountability Chart Connection: [Which seat owns this process]

Process Overview

Purpose: Ensure smooth employee transitions while maintaining positive relationships and protecting company interests

High-Level Steps:

1. Initiate departure process and documentation
2. Plan knowledge transfer and transition
3. Conduct exit interviews and feedback collection
4. Complete administrative and legal requirements
5. Manage final work period and handoffs
6. Maintain positive alumni relationships

Core Process Detailed Steps

Step 1: Initiate Departure Process and Documentation
- Document resignation or termination details
- Notify relevant stakeholders and team members
- Review employment agreement and final pay calculations
- Begin offboarding checklist and timeline
- Assign transition coordinator and responsibilities

Step 2: Plan Knowledge Transfer and Transition
- Identify critical knowledge and responsibilities to transfer
- Create documentation of key processes and contacts
- Identify who will take over ongoing responsibilities
- Plan training and handoff sessions
- Establish timeline for knowledge transfer activities

Step 3: Conduct Exit Interviews and Feedback Collection
- Schedule exit interview with HR and/or manager
- Use standardized exit interview questions
- Gather feedback on role, management, and company experience
- Document insights for organizational improvement
- Maintain confidentiality and professional approach

Step 4: Complete Administrative and Legal Requirements
- Process final payroll and benefits termination
- Collect company property and access credentials
- Review and obtain signed confidentiality/non-compete agreements
- Provide COBRA and benefits continuation information
- Update organizational charts and directory

Step 5: Manage Final Work Period and Handoffs
- Ensure smooth transition of ongoing projects
- Facilitate introduction of replacement or interim coverage
- Complete final performance documentation
- Conduct team communication about transition
- Organize farewell activities if appropriate

Step 6: Maintain Positive Alumni Relationships
- Provide positive references when appropriate
- Maintain professional network connections
- Consider rehire opportunities for strong performers
- Gather feedback on offboarding experience
- Update alumni database and communication

Quality Standards & Success Metrics

Must-Have Standards:
[ ] Standard 1 (measurable)
[ ] Standard 2 (measurable)
[ ] Standard 3 (measurable)

EOS Scorecard Metrics:
Weekly Metric 1: [Target number]
Weekly Metric 2: [Target number]
Monthly Metric: [Target number]

Accountability: HR owns process coordination and compliance, Manager owns transition planning, IT/Facilities own access and property recovery
Frequency: As needed for departures, process reviewed annually
Success Metrics: Knowledge transfer completion, exit interview participation, alumni satisfaction, compliance completion rates

Process Connections

Receives From: [Which EOS core process feeds into this one]
Hands Off To: [Which EOS core process this feeds into]
Dependencies: [Other processes or resources needed]

Tools & Resources

Required Systems/Tools:

Tool 1
Tool 2

Template/Document links

Training Materials:
Link to training video
Link to detailed SOPs (if needed)
Onboarding checklist

Troubleshooting & Common Issues

If [Problem], Then [Solution]:
Problem 1 → Solution 1
Problem 2 → Solution 2
Problem 3 → Solution 3
Escalation: [When to involve process owner or leadership team]

Process Improvement

Last Quarter's Improvements: [What was changed and why]
Current Issues to Address: [Items for next EOS Rock or Level 10 discussion]
Issue 1
Issue 2

Ideas for Next Quarter: [Potential improvements to consider]

Approval & Sign-Off

Process Owner Approval: [Name + Date]
Leadership Team Review: [Date reviewed in Level 10 or quarterly]
Next Review Date: [Align with EOS quarterly cycle]

Quick Reference Card

[One-page summary of key steps for daily use]

The 5 Key Steps:

[Step 1 summary]
[Step 2 summary]
[Step 3 summary]
[Step 4 summary]
[Step 5 summary]

Key Metrics: [2-3 most important numbers to track]

Emergency Contacts: [Who to call if process breaks down]