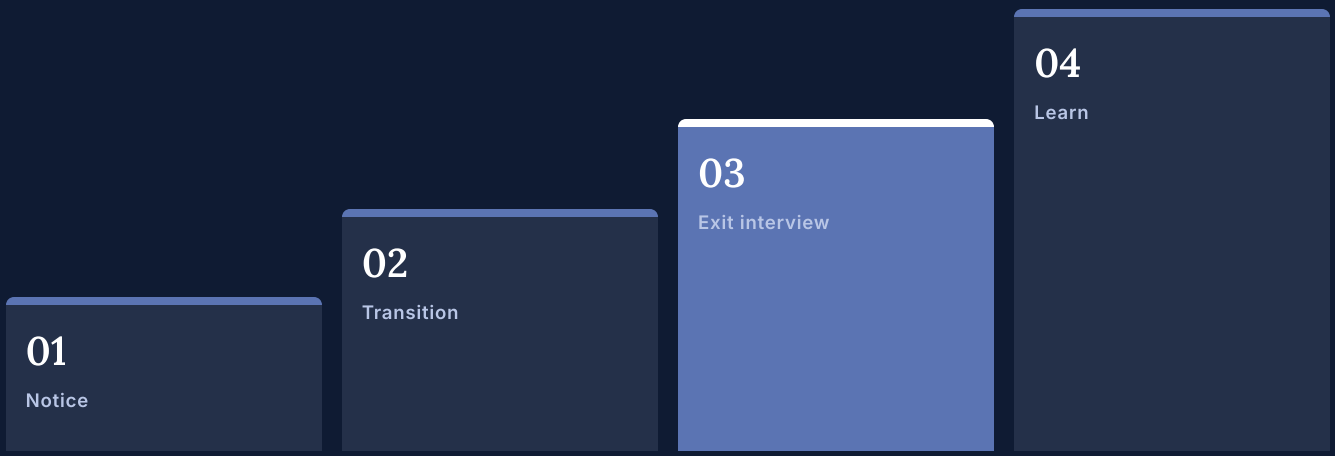
Herrera
HR GROWTH PARTNERS

FOUNDER FIELD GUIDE

THE OFFBOARDING AND EXIT INTERVIEW TOOLKIT

Every goodbye tells you something. *Most companies never ask.*

Checklists, scripts and exit interview questions to handle departures smoothly, protect the company and learn why people leave.



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A NOTE BEFORE YOU START

How someone leaves shapes what they say about you for years, and what the people who stay believe about you tomorrow.

Departures are a normal part of a growing company. People move for a new challenge, a move across the country or a different stage of life. But a sloppy exit can leave a former employee with system access, a missed final paycheck or a story worth repeating, and a skipped exit interview means you never learn what might push the next person out the door.

This toolkit focuses on resignations and other voluntary departures. For performance or misconduct terminations, see **The Termination Guide**; for layoffs, **The Layoff Playbook**.

Peter Herrera

Founder, Herrera HR Growth Partners

SECTION 01

Why offboarding matters

Onboarding gets the attention. Offboarding protects the company and gives you some of the most honest feedback you'll ever get.

SECURITY

Close every door

Former employees with live access to email, shared drives, customer systems or the payroll account are a real risk. Access should end on the last day, every time.

COMPLIANCE

Get the money and paperwork right

Final pay deadlines, PTO payout rules, COBRA and required state notices all apply to resignations too.

CONTINUITY

Keep the knowledge

Client relationships, passwords, half-finished projects and "how we do this" knowledge need a home before the last day.

REPUTATION

Leave the door open

Former employees become customers, referrers, reviewers and sometimes rehires. A respectful exit pays off for years.

> **Most resignations start long before the notice**
>
> Many resignations are decided quietly, long before anyone notices. Stay interviews and regular one-on-ones catch the reasons earlier. The exit interview is your last chance to learn them.

Common offboarding mistakes

Access left open	A former employee can still log in to email, files or customer systems weeks later
Final pay handled late	State deadlines are missed because no one checked the rule until the last day
Knowledge walks out	No handoff notes, so clients and projects stall
No exit conversation	The same problem quietly pushes out the next person
A cold goodbye	A good employee leaves feeling unappreciated and says so publicly

SECTION 02

When someone resigns

The first five minutes set the tone for the whole notice period. Don’t take it personally, even when it feels personal.

THE FIRST CONVERSATION

Thank them, ask, and agree on next steps

“Thank you for telling me directly. I’m sorry to see you go, and I appreciate everything you’ve done here. Can I ask what led to the decision, and what you’re going to next?”

“Let’s agree on your last day and how we’ll hand off your work. I’ll loop in HR today. Would you like to tell the team yourself, or should I?”

DO

- Ask for the resignation in writing, with the last day
- Tell HR the same day
- Agree on who announces it, and when
- Ask for a list of projects, deadlines and contacts
- Keep including them in normal work and meetings

DON’T

- Guilt them, or ask them to reconsider in the moment
- Cut them out of everything right away
- Speak badly about them or their new employer
- Promise a counteroffer before you’ve thought it through
- Retaliate in any way, including against people who leave for a competitor

Counteroffers

A raise can keep someone in the short term, but it rarely fixes the reason they started looking. If you make one, address the real reason, not just pay, and be consistent: others will hear about it.

Should they work the notice period?

Usually yes. Ending employment early is sometimes appropriate, such as when someone joins a direct competitor, but check your policy and state final pay rules, and be consistent.

SECTION 03

The offboarding checklist

Assign each task to an owner. In a small company one person may wear several hats; what matters is that nothing is left to "someone."

THE MANAGER

- [ ] Thank them and ask about their reasons and plans
- [ ] Tell HR the last day, the reason for leaving and any concerns
- [ ] Get a list of projects, deadlines, clients and logins they manage
- [ ] Announce the departure, or agree on how they will
- [ ] Reassign work and introduce clients to their new contact
- [ ] Schedule time for training or written handoff notes
- [ ] Plan a send-off that fits the person

HR OR OPERATIONS

- [ ] File the written resignation
- [ ] Confirm the final pay date under state law, including any required PTO payout
- [ ] Check for repayable bonuses, expense reports and outstanding advances
- [ ] Send benefits information: end dates, COBRA, 401(k), HSA or FSA
- [ ] Provide state-required notices, such as unemployment information
- [ ] Remind them of confidentiality or other agreements they signed
- [ ] Confirm their mailing address for the W-2
- [ ] Schedule the exit interview
- [ ] Update the org chart, contact lists and HR records

TELLING THE TEAM

Sample announcement

*"I want to share that **[name]** has decided to move on, and their last day will be **[date]**. We're grateful for everything they've contributed, especially **[specific example]**. Over the next two weeks, **[name]** will hand off their work to **[names]**. Please join me in wishing them well."*

Final pay applies to resignations too

Deadlines depend on the state where the employee works and sometimes on whether they gave notice. Some states also require payout of earned, unused vacation. Confirm the rule as soon as notice is given, not on the last day.

IT AND SECURITY

- [ ] Schedule access to end at the close of the last day, across every system, including personal-device apps
- [ ] Change shared passwords and transfer ownership of accounts, files and domains
- [ ] Back up their files and give relevant ones to the manager
- [ ] Forward email to the manager for a set period, with an auto-reply
- [ ] Collect the laptop, phone, badge, keys and cards; send prepaid shipping to remote staff
- [ ] Remove them from the website, directories and vendor portals

THE DEPARTING EMPLOYEE

- [ ] Write handoff notes: status, next steps, contacts and where files live
- [ ] Share their personal contact information for tax forms and benefits
- [ ] Return company property and delete company data from personal devices
- [ ] Submit final expense reports and timesheets
- [ ] Say goodbye to the team and share how to stay in touch, if they'd like

A typical timeline for two weeks' notice

WHEN	WHAT HAPPENS
Day of notice	Conversation with the manager; HR notified; last day confirmed in writing
Days 1–3	Team told; handoff plan agreed; exit interview scheduled
Week 2	Training and handoff notes; client introductions; exit interview
Last day	Equipment returned; access ends; goodbye; final pay as your state requires
After	Benefits and COBRA notices; W-2 next January; exit feedback added to your tracking

Leaving on bad terms?

If a departing employee is upset, heading to a competitor or has access to sensitive data, move faster on access and equipment, keep the conversation professional, and document what was returned. If they raise a complaint on the way out, treat it like any other complaint and investigate.

SECTION 04

Exit interviews that get honest answers

Most departing employees are wary of exit interviews. They worry about burning bridges, or assume nothing will change. How you set it up decides what you hear.

Who

HR or a leader one step removed, not the direct manager. People are rarely candid with the person they may be leaving because of.

When

In the last week, or a few weeks after they leave, when people are often more candid. A short written survey can supplement the conversation.

How

In person or on video, 30 minutes, private. Take notes and let them talk. Ask follow-up questions instead of defending.

OPENING THE CONVERSATION

Explain why you're asking

"Thanks for making time. The goal is simply to learn what it was like to work here, so we can make it better for the people who stay. Nothing you say affects your references or final pay. Share as much or as little as you'd like."

GOOD PRACTICE

- Ask open questions; follow up with "Tell me more"
- Thank them for difficult feedback
- Keep notes factual and store them securely

WATCH FOR

- Reports of harassment, discrimination, safety or pay problems. Those need follow-up, even after someone leaves
- Patterns that point to one manager or team

Interview or survey?

A conversation gets depth and follow-up. A short anonymous survey, sent a few weeks after someone leaves, often gets more candor. Many companies use both.

What to do with what you hear

Summarize the main themes in two or three sentences, without identifying details, and add them to your tracking. Share themes with leadership each quarter.

20 exit interview questions

Pick 8 to 12 that fit the person and the time you have.

WHY THEY'RE LEAVING

1. What made you start looking, and when?
2. What does your new role offer that you couldn't get here?
3. Was there a moment when you knew you'd leave?
4. What, if anything, could have changed your mind?

MANAGER AND TEAM

5. How would you describe the way you were managed?
6. How often did you get useful feedback?
7. Did you feel recognized for your work?
8. How well did your team work together, and with other teams?

THE ROLE

9. Were your responsibilities and expectations clear?
10. Did you have the tools, training and support you needed?
11. Did the job match what you were told when you were hired?
12. Did you see a path to grow here?
13. How was your workload over the last six months?

LOOKING AHEAD

14. What should we keep doing?
15. What's one thing you'd change about working here?
16. Were pay and benefits a factor? Which ones?
17. What risks do you see for the company or your team?
18. What advice would you give your replacement?
19. Would you recommend working here to a friend? Why or why not?
20. Would you consider coming back someday?

SECTION 05

Turn exits into action

One exit interview is a story. Ten are data. The value comes from looking across them and acting on what you find.

Track every departure the same way

FIELD	EXAMPLE
Role, team, manager, tenure	Account manager, Sales, J. Park, 1.5 years
Voluntary or involuntary	Voluntary
Regretted?	Yes: strong performer we wanted to keep
Main reason	Growth: no path to senior role
Other factors	Workload; pay below market
Where they went	Competitor, senior title, about 15% more pay

REVIEW QUARTERLY

- Regretted turnover by team and manager
- The top three reasons people leave
- When people leave: first 90 days, year one, year two
- Where they go, and what they gained

THEN ACT, AND SAY SO

- Pick one pattern to fix each quarter
- Check whether current employees feel the same, through stay interviews or a pulse survey
- Tell the team what you changed

Keep the door open

Good former employees are referral sources, customers and sometimes your best rehires. A simple alumni list, a LinkedIn connection and a note on their work anniversary keep the relationship warm.

SECTION 06

How I help

As your fractional HR partner on a monthly retainer, I help you handle departures cleanly and, more importantly, keep the people you don't want to lose.

- Offboarding checklists and owners set up in your HR system
- Neutral, confidential exit interviews
- Quarterly turnover analysis with clear recommendations
- Stay interviews to catch problems earlier
- Manager coaching on resignations and counteroffers
- Support for difficult or high-risk departures

20+ years of HR leadership	**4 industries** financial services, healthcare, hospitality and tech	**2 companies** where I built HR from scratch	**1 to 250** employees: the companies I serve



ABOUT PETER HERRERA

I've spent more than 20 years leading HR in financial services, healthcare, hospitality and tech. I was the first HR leader at a five-venue hospitality group, and later built the HR function at a tech company. I started Herrera HR Growth Partners to give founders senior HR partnership without a full-time hire. I'm based in Chicago and work with growing companies across the U.S.

YOUR NEXT STEP

Losing people you wanted to keep? *Let's find out why.*

Bring your last few departures to a free intro call. We'll look for the pattern and what to do about it.

FREE 20-MINUTE INTRO CALL

What you'll leave with

- A read on the most likely reasons people are leaving
- Gaps in your offboarding that create risk
- Two or three retention moves to try this quarter, and how a monthly retainer would keep them going

No pitch deck, no obligation. If you don't need me, I'll tell you.

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