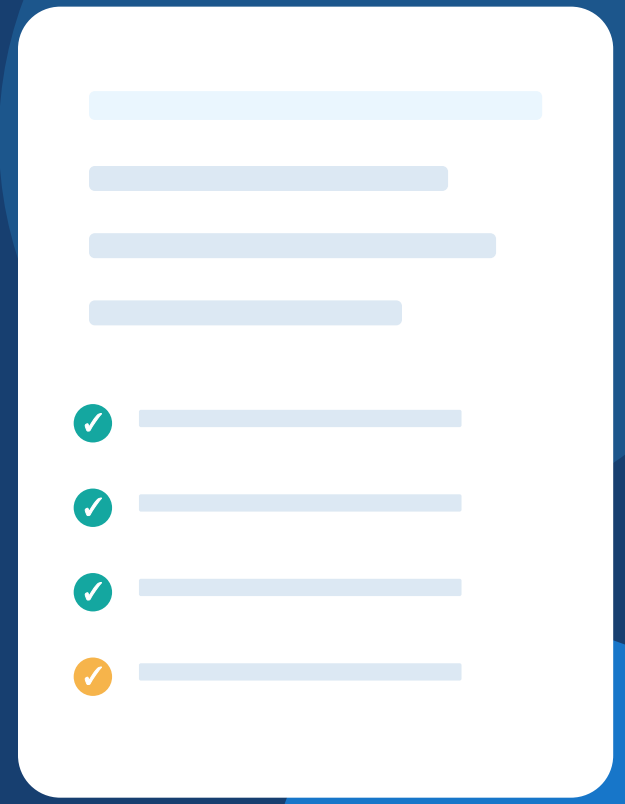
THE OFFBOARDING PLAYBOOK

Offboarding by Design

A repeatable workflow. A respectful goodbye.

Secure transitions • Knowledge continuity • Human connection



CLAY HR

THE DESIGN PRINCIPLE

Two outcomes. One deliberate process.

A great departure is operationally complete and personally considered.

OPERATIONAL CERTAINTY

Every task has an owner, deadline, status and auditable completion record.

HUMAN DIGNITY

Every person receives timely communication, clarity, empathy and a thoughtful farewell.

The workflow is standardized. The conversation is personal.

CLAY HR

WORKFLOW ARCHITECTURE

A repeatable workflow from trigger to closure

Configure the milestones once; launch the right path for each separation.

01
Initiate
HR / manager

→

02
Orchestrate
Task owners

→

03
Secure
IT / facilities

→

04
Transfer
Manager / team

→

05
Close & learn
HR / employee

Role-based routing | **Deadlines + reminders** | **Conditional branches** | **Evidence + audit trail**

CLAY HR

CONFIGURATION

Build the process as a reusable template

One core framework; context-aware paths for very different departures.

Trigger

Branch

Assign

Control

SAMPLE ROUTING RULE

IF **Employee has privileged system access**

THEN Require IT security review before closure

CLAY HR

EXECUTION VISIBILITY

The offboarding control tower

Replace email chasing with accountable work, visible in one place.

TASK	OWNER	DUE	STATUS	EVIDENCE
Confirm final pay inputs	Payroll	T−5	In progress	Checklist
Capture project handover	Manager	T−3	At risk	Document
Collect laptop + badge	Facilities	T0	Scheduled	Receipt
Revoke application access	IT	T0	Pending	IT log

Illustrative task board — roles, dates and evidence requirements should reflect company policy.

RISK & CONTINUITY

Protect the business without losing trust

Security and continuity should be planned—not improvised on the last day.

ACCESS

Identify accounts; schedule deactivation; verify completion.

ASSETS

Inventory equipment, keys and credentials; record returns.

KNOWLEDGE

Document key decisions, contacts, systems and in-flight work.

COMPLIANCE

Complete local paperwork, retention and final pay checks.

PEOPLE FIRST

Human touch is not an optional workflow step

Technology can coordinate the experience. People must lead the moments that matter.

1 **BEFORE**

A direct, private conversation

Explain the decision or next steps clearly; give the employee room to ask questions.

2 **DURING**

A dignified transition

Offer a named HR contact, predictable timeline and helpful written guidance.

3 **AFTER**

A gracious goodbye

Thank people sincerely where appropriate; offer respectful alumni connection.

Empathy, transparency, privacy and consistency apply to voluntary and involuntary separations.

EMPLOYEE JOURNEY

Make the last mile clear for every stakeholder

Automation should reduce uncertainty—not create another portal to navigate.

EMPLOYEE VIEW

- ✓ **My timeline and next steps**
- ✓ Benefits / final pay guidance
- ✓ Asset return instructions
- ✓ One person to contact

MANAGER VIEW

- Clear handover owner
- Open tasks and escalations
- Team communication plan
- Completion confirmation

THE RESULT

A process you can trust.
A goodbye they can respect.

100%

task ownership

Fewer

last-day surprises

Better

knowledge continuity

Design your offboarding workflow with ClayHR

clayhr.com/employee-offboarding