HUMAN CAPITAL MANAGEMENT
EXITING EMPLOYEE TOOLKIT – FOR MANAGERS OF EXITING EMPLOYEES

Forward thinking managers track the circumstances of an employee exiting as well as the outgoing perceptions of those employees. A strong exiting process ensures that vital knowledge is not lost to the organization when people leave and shortens the learning curve of new people joining the organization.

This toolkit is intended to help structure your thinking as a manager when approaching the exiting process and to ensure that both you and your exiting employee get the most out of the process.

The Onboarding & Retention team is happy to assist if you need additional help or have any questions. Please email us at onboarding@dallasisd.org for any questions about the exiting process.

Included in this toolkit:

I. Exiting Checklist – For Managers of Exiting Employees  
II. Succession Planning Roadmap – For Exiting Employees  
III. Exit Interview Guide – For Managers of Exiting Employees  
IV. Exit Interview Question Bank – For Managers of Exiting Employees
EXITING CHECKLIST – FOR MANAGERS OF EXITING EMPLOYEES

EMPLOYEE INFORMATION

Name: ___________________________________________ Separation Date: ___________________________

Position: ________________________________________ Manager: ________________________________

PRIOR TO SEPARATION DATE CHECKLIST

☐ Remind employee to submit an electronic SS4

☐ Review Succession Planning Roadmap– For Exiting Employees with employee

☐ Arrange for handover of any relevant work material, including moving folders/files from the employee’s hard drive to a shared drive

☐ Collect and submit “Items to submit to Department Manager” (*listed below)

☐ Email hris@dallasisd.org with org chart updates

☐ Inform all email list administrators to ensure that employee details are removed from mailing lists/phone lists

☐ Update department webpage, if applicable

☐ Conduct confidential exit interview

☐ Clean workspace

*ITEMS TO SUBMIT TO DEPARTMENT MANAGER

☐ ID badge

☐ Access Card (only applicable to employees working at 9400 North Central Expressway)

☐ Laptop and/or any issued technology, if applicable

☐ Building/office/desk keys, if applicable

☐ Succession Planning Roadmap – For Employee

* Please reach out to the Onboarding team if you need any guidance or assistance with any of the above action items.
SUCCESION PLANNING ROADMAP – FOR EXITING EMPLOYEES

A succession roadmap is an opportunity to enable the transfer of knowledge and experience from the departing employee to the team/department.

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<th>EMPLOYEE INFORMATION</th>
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<td><strong>Name:</strong></td>
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<tr>
<th>KEY ROLES AND RESPONSIBILITIES</th>
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<td><strong>Daily</strong></td>
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<th>RELATED SOP’S ON FILE</th>
<th>ORACLE ACCESSES AND RESPONSIBILITIES</th>
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<tr>
<th>PASSWORDS TO DEPARTMENT FILES OR ACCOUNTS</th>
<th>KEY DEPARTMENTS OR INDIVIDUALS WORKED CLOSELY WITH</th>
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<th>KEY REFLECTION</th>
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<td><strong>What went well?</strong></td>
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<td><strong>What could have been improved?</strong></td>
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EXIT INTERVIEW GUIDE – FOR MANAGERS OF EXITING EMPLOYEES

Exit interviews greatly improve the chances of successfully obtaining and transferring useful knowledge, contacts, insights, tips and experience. Additionally, the exit interview is your opportunity to obtain information about what the team/department is doing well and what needs to improve. Most employees are happy to help. Below are some tips and guidelines for a successful exit interview.

TIPS AND GUIDELINES

- Select the questions that are the most relevant for your team or department
- Unless an employee has a lot of thoughts to offer, the exit interview should take around a half hour to an hour
- Start your exit interview by reviewing the Succession Planning Roadmap
- Assure the employee that no negative consequences will result from honest discussion during the exit interview
- Conduct the exit interview before the employee has been officially terminated

Feel free to use the space below to take notes during the exit interview.
EXIT INTERVIEW QUESTION BANK – FOR MANAGERS OF EXITING EMPLOYEES

1. Why have you decided to leave the organization?
2. If applicable – What does your new company offer that encouraged you to accept their offer and leave this organization?
3. What do you value about our organization? What did you dislike?
4. What could your supervisor do to improve his or her management style and skill?
5. What did you like most about your job?
6. What did you dislike about your job? What would you change about your job?
7. Do you feel you had the resources and support necessary to accomplish your job? If not, what was missing?
8. Did you have clear goals and know what was expected of you in your job?
9. Did you receive adequate feedback about your performance day-to-day and in the performance development planning process?
10. Did you clearly understand and feel a part of the accomplishment of the organization’s mission and goals?
11. Did the management of the organization care about and help you accomplish your personal and professional development and career goals?
12. Describe the qualities and characteristics of the person who is most likely to succeed in this company.
13. What are the key qualities and skills we should seek in your replacement?
14. What would make you consider working for this company again in the future? Would you recommend the company as a good place to work to your friends and family?