

The Resourceful Manager's Termination Checklist



Keep this checklist handy as you move an employee through the 12 important steps of the termination process. If you answer “yes” to all 12, you can rest assured that you have done everything possible to terminate the employee legally, ethically, and with compassion and respect.

Coaching

- Yes No Did you start the process of trying to get the employee to improve his or her performance with a supportive coaching session, without resorting to progressive discipline right away? Was the employee given every chance to improve?

Final warning

- Yes No Have you given the employee one final warning spelling out clearly where he or she is coming up short of expectations and how he/she can improve to keep his/her job?

Severance pay

- Yes No Have you determined, in close coordination with the HR Department and with company policy and/or practice, how much severance you will offer the terminated employee? You want to be prepared as you go into the termination meeting.

Benefits

- Yes No Have you determined what further benefits the terminated employee will be entitled to, such as unused vacation, vesting in 401(k) and/or profit-sharing plans, any continuation of medical insurance and/or COBRA rights and benefits, and the privilege of being able to apply for unemployment insurance benefits without any company opposition if it should become necessary for the employee? Employees need to know this nitty-gritty information, and it is a sign of respect to have it ready for them. Your HR and benefits departments can help with this.

Paperwork

- Yes No Has the HR Department prepared a separation agreement to be signed by the terminated employee spelling out what severance he/she will receive in return for a promise not to sue the company for any reason (a mutual release)? HR can help with this, too, but have it ready to go for the termination meeting with.

Remember: If they want to take it home, think it over or consult with an attorney, you have to let them, but they have to know severance payments will not start until you have a signed agreement in hand.

Time & place

- Yes No Have you picked a convenient time and place for the termination meeting to take place (end of the week, closed conference room, etc.), and determined who else should be present? Most importantly, does the employee know that he or she is supposed to be at the place at the appointed time and have they confirmed they'll be there?

Respect

- Yes No Are you prepared to treat the employee with respect and dignity even as you ease them out of your company? And did you in fact do so? The decision had been made; there was no need to repeat all the employee's shortcomings. Instead, it was time to help them transition to a new work life. Two powerful reasons to do so: 1) it's a matter of the golden rule and you would want to be treated that way in their position, and 2) people who say they were treated with respect in terminations are much less likely to sue for any reason.

Security

- Yes No If you had any reason to suspect that the employee might react violently to the news that he/she was being terminated, did you put a friendly (and ideally physically imposing) colleague, or building security, or even the local police as a resort, on standby in case they would be needed?

IT access

- Yes No Did you advise the IT department to delete the employee's company email address (or forward client messages to another employee) and de-activate their access to company systems and passwords?

Office access

- Yes No Did you retrieve building entry keys or access card(s) from the departing employee? You really don't want to be chasing after the employee for these items later.

Final departure

- Yes No Have you determined that the employee is no security threat and can be allowed to pack up his or her own personal belongings and briefly say goodbye to friends and colleagues?

Communication

- Yes No Have you decided what you will say to the rest of the staff about the departure in a way to help them focus on going forward, not look backward?