



Exit Interview Checklist Template

Our template helps your HR team manage exit interview tasks, ownership, and data capture in one place.

Use this exit interview checklist to ensure every step of the process is completed consistently. Assign one owner per task, set clear deadlines, and log structured data after the interview.

PRE-EXIT PREPARATION (After Notice Is Given)

✓	Task	Owner	Deadline	Notes
<input type="checkbox"/>	Confirm the employee's last working day	HR	Immediately after notice	
<input type="checkbox"/>	Trigger offboarding workflow	HR	Same day	
<input type="checkbox"/>	Send exit survey (if used)	HR	Within 24 hours	
<input type="checkbox"/>	Schedule exit interview (2–3 days before last day)	HR	Within 2 days of notice	
<input type="checkbox"/>	Assign an interviewer (HR or neutral leader)	HR	Before scheduling	
<input type="checkbox"/>	Share exit interview questions in advance	HR	3–5 days before the interview	
<input type="checkbox"/>	Prepare employee record for data capture	HR	Before interview	

EXIT INTERVIEW SETUP (Before the Conversation)

✓	Task	Owner	Deadline	Notes
<input type="checkbox"/>	Review employee history and role context	HR	Before interview	
<input type="checkbox"/>	Review exit survey responses (if available)	HR	Before interview	
<input type="checkbox"/>	Prepare a structured note-taking template	HR	Before interview	
<input type="checkbox"/>	Define departure categories (e.g., growth, manager, comp)	HR	Before interview	
<input type="checkbox"/>	Prepare confidentiality statement	HR	Before interview	

EXIT INTERVIEW (During the Conversation)

✓	Task	Owner	Deadline	Notes
<input type="checkbox"/>	Open with a purpose and confidentiality explanation	HR	Start of interview	
<input type="checkbox"/>	Ask questions by category (reason, manager, culture, growth, process)	HR	During interview	
<input type="checkbox"/>	Use open-ended follow-up questions	HR	During interview	
<input type="checkbox"/>	Capture key quotes and examples	HR	During interview	
<input type="checkbox"/>	Identify the primary reason for leaving	HR	During interview	
<input type="checkbox"/>	Ask “What would have made you stay?”	HR	During interview	
<input type="checkbox"/>	End with open feedback (“Anything else?”)	HR	End of interview	

POST-INTERVIEW (Immediately After)

✓	Task	Owner	Deadline	Notes
<input type="checkbox"/>	Log structured departure reasons	HR	Same day	
<input type="checkbox"/>	Categorize feedback (growth, manager, culture, etc.)	HR	Same day	
<input type="checkbox"/>	Attach notes to employee record	HR	Same day	
<input type="checkbox"/>	Flag critical issues (legal, compliance, misconduct)	HR	Same day	
<input type="checkbox"/>	Capture actionable insights	HR	Same day	

ANALYSIS & REPORTING (Ongoing)

✓	Task	Owner	Deadline	Notes
<input type="checkbox"/>	Aggregate exit data across employees	HR	Monthly/Quarterly	
<input type="checkbox"/>	Identify patterns and recurring issues	HR	Quarterly	
<input type="checkbox"/>	Segment data by team, manager, tenure	HR	Quarterly	
<input type="checkbox"/>	Prepare anonymized report for leadership	HR	Quarterly	
<input type="checkbox"/>	Highlight top 2–3 retention risks	HR	Quarterly	

ACTION & FOLLOW-UP

✓	Task	Owner	Deadline	Notes
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<input type="checkbox"/>	Share insights with leadership team	HR	Quarterly	
<input type="checkbox"/>	Assign owners for key issues identified	Leadership	After review	
<input type="checkbox"/>	Implement changes (policy, management, process)	Leadership	Ongoing	
<input type="checkbox"/>	Communicate changes to employees	HR	After action	
<input type="checkbox"/>	Feed insights into stay interviews	HR	Ongoing	

OPTIONAL: BY EXIT TYPE ADJUSTMENT

Exit Type	Adjustment
Resignation	Focus on retention insights and root cause
Termination	Focus on compliance, documentation, and risk
Retirement	Focus on knowledge transfer and succession