

Prepare for the conversation

- Commence drafting a Termination memo (refer to [Termination memo](#))
- Take steps to remove the employee's system access when terminated (consult [Pre-Termination Checklist](#))
- Submit a separation notice form to Helpside and make arrangements for the final paycheck
- Check if the employee is enrolled in benefits so you can inform the employee of when their benefits will end.
- Create a list of company property the employee has (consult [Pre-Termination Checklist](#))
- Decide how and when you'd like the employee to collect their belongings
- Decide on an appropriate way to notify the employee's team members after the termination is complete
- Rehearse the key points of the termination meeting in advance

Who should be involved in the meeting?

Include key leadership in the meeting. At least two members of your leadership team should be in attendance:

- **Employee's Direct Leader:** This is the leader who has managed the employee's performance and delivered previous corrective action discussions. This person will be leading the meeting.
- **HR Leader or Executive Level Leader:** This person will serve as a witness.

What should I say? (Direct Leader)

Deliver the news quickly and definitively. Any extended or unnecessary pleasantries could distract from the message and could create confusion that this is a performance conversation rather than a termination action. Focus on stating the facts, who, what, when and why.

- **Who:** "Joe/Jane"
- **What:** "Your employment is being terminated"
- **When:** "Effective immediately"
- **Why:** "Your (attendance/performance/safety practices) is not meeting expectations."
 - Tell the employee the reason for the termination in clear terms. This is not the time to skirt around the issue to attempt to soften the blow. There is no need to go through a step-by-step analysis of the documentation supporting the reason for discharge. A succinct, clear statement of the reason for termination is sufficient.
- **Leadership Agreement Statement:** "We have agreed as a leadership team on this matter. The decision is final."

Share Logistical Information (HR Leader or Executive Level Leader)

Review with the employee a written summary of benefits. This summary should include, where applicable, severance pay, pending bonus or commission payments, compensation for unused vacation and sick time (consult the [Vacation Pay Laws by State](#) document for more information), continuation of health and life insurance benefits, COBRA, 401k, and other benefits.

- "Your final paycheck will be issued on **DATE XX** covering payment through today." Refer to and follow the [Final Pay by State guidelines](#).
- If applicable, "Your health benefits will continue throughout the month in which you are terminated."
- If applicable, "You will receive information about COBRA directly from our benefits provider in the next few weeks."
- "Your vacation and paid time off will be paid out in your final paycheck." **OR** "Your vacation and paid time off will not be paid out in accordance with our company policy."
- "Your commissions/bonus will be paid out on **DATE XX**."

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- If terminating a leader and/or using a severance agreement/release,¹ then:
 - “I also have a severance agreement for you. If you sign the severance agreement, the company will provide you with a severance payment of **\$XX.XX AMOUNT**. Before you sign, you may review the agreement. The severance agreement expires in **XX** days, so please let us know your decision within that time period. You may consult with legal counsel of your choosing before signing this agreement.”
- Inform the employee how to collect his or her personal belongings.
- If applicable, outline the steps to collect company property including ID, keys, credit cards, laptop, phone, uniform, etc. (Review the [Pre-Termination Checklist](#)) “Please leave your laptop and keycard at your desk.”

End the Meeting (Direct Leader)

“If you have any questions, you may contact me or our HR team directly.”

- Escort employee from the building, being careful to minimize disruptions to other employees and to maintain the dignity of the terminated employee.

Important notes to keep in mind:

- A termination conversation is never easy. As a result, managers sometimes make excuses, apologize, or give advice to the employee to reduce awkwardness or discomfort. While you should be empathetic in your planning for the conversation but during the meeting it is best to stick with the facts.
- Even if the termination is not a complete surprise (such as where an employer has followed a [progressive disciplinary process](#)), the employee will likely reflect an attitude of surprise. Walk them through the process with compassion. Think of how you would hope to be treated if you were in their shoes.
- You may be tempted to skip steps in the process, such as escorting the employee out of the office or staying with them while they pack up their personal belongings, but skipping steps is not recommended. It is in an employer’s best interest to remain with the employee from the termination meeting until they exit the building, no matter how much you feel you can trust the individual.
- If the terminated employee brings up concerns, objections, or becomes overly emotional, find ways to keep the conversation moving forward. Remember, this whole process should be brief.

¹ Depending on the affected employee, a severance agreement and release may require a certain waiting period. Because severance agreements are fact-specific, it is prudent to consult experience legal counsel before finalizing a severance offer that includes a release of an employee’s claims.

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