

DEALERSHIP EMPLOYEE OFFBOARDING CHECKLIST

Use one copy per person who leaves, whatever the reason. Pick the successor first, then switch the person off in the CRM with a handover before the conversation ends. Tick each step when it is done and note who did it. Confirm pay and benefits rules for your state with your payroll provider or employment counsel.

THE FIRST HOUR

Step	What to do	Who
☐ Successor	Name one person to take over every open customer. For a large book, split it and name every receiver.	Sales manager
☐ CRM switch off	User Management: Disable, then Hand over their work to the successor and click Switch off. For a leave of absence choose Temporary leave.	Sales manager
☐ Round robin	Take the person out of every rotation.	CRM administrator
☐ Ring list	Remove them from Forward Calls To.	CRM administrator
☐ Keys and plates	Collect keys, key fobs, dealer plates and any demo vehicle.	Sales manager
☐ Devices and cards	Collect the company phone or tablet, fuel card, badge and building code.	Office manager

THE FIRST DAY

Step	What to do	Who
☐ Email	Forward to the successor or a manager for a set period and set an automatic reply that names the new contact.	Office manager
☐ DMS	Disable the DMS login.	Office manager
☐ Lender and manufacturer portals	Disable their logins and remove them from lender contact lists.	Finance manager
☐ Ad accounts and social pages	Remove access and confirm the store keeps an owner level login.	Marketing owner
☐ Website and vendor portals	Remove access and change any password they knew.	CRM administrator

Step	What to do	Who
☐ Shared passwords and codes	Change shared passwords, alarm codes, gate codes and key machine access.	Office manager
☐ Tracking numbers	Point any number that rings their cell back at the store.	CRM administrator
☐ Manager copies and alerts	Remove them from manager copies, Default Manager Copies and alert lists.	CRM administrator
☐ Greetings	Record the company greeting again if it names them; retire their voicemail greeting.	CRM administrator
☐ Scheduled messages	Check the Scheduled Messages queue for anything set to go out under their name.	CRM administrator
☐ Group chats and folders	Remove them from staff group chats outside the CRM and from shared drives.	Office manager

THE FIRST WEEK

Step	What to do	Who
☐ Final pay	Pay by your state's deadline for a final paycheck.	Payroll
☐ Commissions	Settle deals in progress, deals in finance and chargebacks under the signed pay plan.	General manager
☐ Benefits	Send the required notices about health coverage and retirement accounts.	Payroll
☐ Property	Record every item returned.	Office manager
☐ Exit conversation	Ask what would have kept them and which customers are waiting on something.	General manager
☐ Agreements	Remind them of any confidentiality or customer list agreement they signed.	General manager
☐ Clean list	Once everything is handed over, use Remove from list. History stays and LeadLocate can restore them.	CRM administrator

SUCCESSOR, FIRST 24 HOURS

Step	What to do	Who
☐ Read	Open each moved lead and read the communications timeline.	Successor
☐ Introduce	Text each open customer from the CRM with a short introduction and no pitch.	Successor
☐ Appointments	Confirm each customer's next appointment by text or call.	Successor

Step	What to do	Who
☐ Deals in progress	Pick up each deal from its Road to Sale checklist.	Successor
☐ Reassign	Tell the manager about any customer who asks for someone else.	Successor

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