

# Termination Meeting Checklist

Keep things on track  
with our comprehensive planning tool



## Information

Gather all of the details that you need to understand the reasons for the notification

- I have confirmed that all decisions have been approved
- I have read all of the official announcements as background
- I understand the reasons for the notification
  - Performance problems or cause
  - Organization's rationale to eliminate positions
- I can explain the reasons for the notification to the employee



## Materials

Make sure you have all of the necessary documents prepared for the meeting

- I have the separation package and/or letter outlining the terms of separation
- I have all related materials and information from HR
- I have a list of all company property to be returned by the employee
- I have contact information for an HR representative to whom the employee can reach out for more details



## Logistics

Make a plan for the timing and location of the meeting

- I have chosen an optimal meeting date and time
  - Early in the week and early in the day is generally better
  - Consider any significant dates connected to the day of the meeting (e.g., birthdays, anniversaries)
- I have allowed enough time for the meeting
- The location I have chosen for the meeting is private and free of possible interruptions
- I have a plan for how the employee will exit the premises after the meeting



## Meeting preparation

Ensure that you are prepared for the meeting and are able to deliver the message clearly

- I have seen the agenda for the notification day
- I have reviewed the termination letter and severance package
- I have rehearsed what I am going to say
- I have a plan for handling potential security or medical problems
- I have scheduled the meeting with the employee



## Career transition services

Get all of the information on the career transition services being offered to the employee

- I know the name of the service provider and the level of service
- I know who the service provider's point person is and have their contact information
- I know when to introduce the career transition consultant to the employee



## Work transition

Create a plan for how the employee's responsibilities will transition following their departure

- I am fully aware of the employee's current projects
- I know which projects might be jeopardized by this notification
- I know which projects are the highest priority and should receive immediate attention
- I have a plan for when, how, and to whom all work will be transitioned
- I have a point person in place to handle the transition



## Notifying the survivors

Put together a communication plan for the remaining staff

- I know when and how I will notify the rest of the team
- I know what I will and will not share regarding:
  - The reasons for the separation
  - The next steps for the organization and the team
  - How responsibilities will be transitioned
  - How the exiting employee will be supported
- I am prepared to answer the team's questions

### We care, and we are here to help.

Verity offers high-touch career transition support that helps organizations protect their brand and minimize risk, while giving individuals the tools they need to move forward. We are proudly Canadian-owned, providing support across Canada and in 30 countries worldwide through our longstanding partnerships. Let's talk about how we can help your organization.

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