



From Launchpad to Landing

SUPPORTING YOUR HR JOURNEY!



HR Toolkit Checklist

TRANSITION

Time for a New Mission. This phase focuses on the changes that come with moving into a new chapter, whether that means retiring, taking on a new career challenge, selling a business, stepping into leadership, or helping employees navigate change.

TASK	DETAIL	COMPLETE?
Employee Transitions		
Task 1	Discuss employee goals to find the best fit	☐
Task 2	Consider temporary assignments	☐
Task 3	Assign someone to train the transitioning employee	☐
Task 4	For voluntary resignations, conduct an exit interview	☐
Company Transitions		
Task 1	Conduct a strategic review of current operations, capital, and debts	☐
Task 2	Consider adjusting workflow, merging redundant teams, and eliminating non-essential costs	☐
Task 3	Decide if your company's form of organization will change	☐
Task 4	Explore if you want to merge with another company, sell the company, or close the company	☐
Task 5	Decide if you are merging with another company, what your new role will be, and if your employees will be retained	☐
Task 6	If not all of your employees will be retained, follow the requirements for a 60-day notice if your company is covered under the Worker Adjustment and Retraining Notification Act (WARN Act) – See note below*	☐
Task 7	Decide if you will maintain an ongoing consulting role if you are selling the company	☐

** Covered employers under the WARN Act include those with 100 or more employees (excluding part-time employees who work less than an average of 20 hours per week or who have been employed for less than six of the 12 months preceding the notice date) and those with 100 or more employees who work a combined total average of 4,000 or more hours per week.*

If you need additional HR resources to support a smooth transition, call us today to see how we can partner to create a plan for a successful splashdown and a well-accomplished mission!

PHONE: (256) 272 9555 | WWW.ROCKETCITYHR.COM

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