

BetterCloud EBOOK

18 Commonly Overlooked Offboarding Steps

Best Practices to Protect Your G Suite, Office 365, Slack,
Dropbox, and Box Data

Introduction

There is more to offboarding than many people—even those within IT—often realize.

To most, offboarding means deprovisioning an exiting employee from apps. Shut off their access, collect their keycard and laptop, and call it a day.

That's just the tip of the iceberg.

In the digital workplace, especially as companies continue to embrace more SaaS apps, offboarding is more than just revoking access. Additional steps are required to protect mission-critical data and keep the business running smoothly. However, these steps are often overlooked, which introduces the risk of data breaches, failed compliance, productivity loss, data loss, and even loss of revenue.

Here at BetterCloud, **we've offboarded one million employees across 3,000 companies.** In this eBook, we'll share some offboarding best practices that apply regardless of company size or industry.

Protect your cloud office suite

G Suite offboarding

1. Disable IMAP/POP settings

This is an important step. If your users have synced their Gmail accounts using IMAP/POP with clients like Outlook or Thunderbird, ex-employees can access email if these settings are still active. You never want a situation where a former employee can still view sensitive files or messages in their inbox.

2. Set up an email autoresponder

Autoresponders can be a great tool to inform people that the user they're emailing is no longer at the company, and subsequently direct them to the appropriate contact. Here's an example of an auto-reply message: *Please be advised that Dwight Schrute is no longer with Dunder Mifflin. If you have any inquiries, please direct them to Michael Scott at miscott@dundermifflin.com.*

This is a crucial step since key customers, prospects, partners, or even fellow employees may not be aware of a departure. The last thing you want is a time-sensitive email sitting in an entirely unmonitored inbox. However, check with HR before going through this process. It may not fit with your company policy.

3. Turn off automatic email forwarding

Gmail users can automatically forward incoming mail to another email address (e.g., a personal Gmail account). It's important to turn this off for anyone exiting the company.

The key here to avoid situations where a former team member is receiving internal communication that, unbeknownst to IT, is being forwarded to a personal email address.

4. Hide the user in the directory

When you hide someone from the directory, their contact information will no longer appear (i.e., auto-complete) when employees type their email address into services like Gmail and Calendar. The user's profile also will no longer appear in Contact Manager.

If a former employee was active with a number of different projects or teams, it may take a while before everyone is aware that they are no longer with the company. Hiding them from the directory can help alleviate confusion.

5. Release Calendar resources

The most common example of a Calendar resource is a meeting room. Other examples include

projectors, company fleet cars, guest offices, recreation equipment, or any other resource people might schedule a time to use.

It may not seem critical. But if the only large conference room or high-definition projector needed for a key customer presentation is booked by an ex-employee, it creates unnecessary frustration for a team member who legitimately needs access to enterprise assets. Releasing these resources will free them up for other employees to use.

6. Remove people from the right shared drives (aka Team Drives)

Depending on how your organization is using Drive, it's important to note that some employees are members of multiple shared drives (formerly known as Team Drives). Take note of what teams or projects the former user worked on, and make sure to remove them.

7. Reset the user's password and sign-in cookies

Resetting a user's password locks them out, preventing them from logging back into their account. It's also a good idea to reset their sign-in cookies. Doing so will sign them out of all current HTTP sessions and help prevent unauthorized access to their old account.

8. Transfer group ownership and membership

Upon offboarding a user, you might have transferred all their Drive files to a new owner—but what about their groups?

If a user is the sole owner of a group, then the group will become orphaned (meaning the group will not have an owner). As part of the offboarding process, remember to transfer group ownership. You might consider transferring group memberships as well. This way someone will receive any group emails where the sender is expecting a response from a former employee.

9. Delete email aliases

It's possible that some of your users have multiple aliases. For instance, a sales director might use the sales@company.com alias in addition to his own email address. When this employee leaves, you may want to either eliminate the alias or attribute it to someone else within the organization in order to ensure that customers still receive timely responses from appropriate personnel.

Office 365 offboarding

10. Remove all devices from user

One of the key benefits of Office 365 is the ability for a user to access their account from any number of devices include mobile devices, home computers, and their office laptop. However, this also means

multiple connections. To mitigate risk during offboarding, make sure you remove all devices that have Office 365 installed.

11. Remove licenses

When a user's license is removed, it's immediately available to assign to another user. The former employee's data (e.g., email, contacts, calendar) is retained for 30 days. After the 30-day grace period, the data is deleted and can't be recovered. (Files that are saved in OneDrive or SharePoint Online are not deleted.) No need to keep a license for a user who is no longer part of the team.

12. Set up an email autoresponder

As with G Suite, it is a good idea to set an email auto-reply when offboarding a user from Office 365. Autoresponders can be a great tool to direct inbound email to the appropriate person. Again, this step can help eliminate situations where customers are waiting on a response while their email sits in an unmonitored inbox.

13. Forward emails to their manager

In lieu of (or in addition to) an email auto-responder, you might want to forward all of a former employee's incoming email to their manager. By creating an email forwarding rule, you can make sure no incoming communication slips through the cracks.

Protect your collaboration tools

Many IT teams believe offboarding ends with revoking access. But collaboration tools like Slack and Dropbox are constantly integrating with a growing number of apps companies use on a daily basis. While this makes them powerful productivity tools, it also creates a web of connectivity that can be easy to overlook.

Slack offboarding

Deactivating a Slack user also means that any apps or integrations they set up are disabled. Because of this, the next step is a commonly overlooked one when it comes to offboarding Slack users.

14. Review integration logs

These logs are important for understanding what integrations are tied to the user's account. If an app or bot is dependent on a user's account being active, and that user is deactivated, then the integration will

break. By sending these integration logs to the right person or channel and reviewing them, you'll have an opportunity to make necessary changes and avoid any business disruption.

Dropbox offboarding

15. Disconnect all third-party apps from the account

When a third-party app is linked to Dropbox, it will have access to basic account information, like a user's registered email address. It may also request access to specific files or folders (or *all* files and folders) in their Dropbox account. Some examples of third-party apps include those used to sign documents, like DocuSign, or apps used to edit pictures, like Adobe. It's best to disconnect all third-party apps from a departing employee's account so that the apps don't retain access to corporate data.

16. Transfer file ownership

Ownership of any files located within a team member's account should be transferred to another employee. This can be the departing user's supervisor, or another colleague who is inheriting their responsibilities. Doing so avoids situations where teams no longer have access to crucial assets because their owner has left the company.

17. Remove user devices

Many users have access from multiple devices. Every time a user downloads the Dropbox app on a device and logs in, that device is linked to their account. Be sure to unlink any devices associated with the user you are offboarding. Doing so will sign them out of the Dropbox app on that device, and changes to files/folders will no longer sync. Unlinking the company-issued laptop is not enough, especially in a world where most employees now embrace the anywhere, anytime, any device mantra. You do not want a situation where a former employee uses their home computer to download schematics for your newest product release two weeks before it goes live.

Box offboarding

18. Move owned items

Be sure to move all of the items owned by a former employee into another user's account. Doing so avoids situations where teams no longer have access to crucial assets because their owner has left the company.

Bonus tips: a few general best practices

Make sure all the necessary departments are talking

“One of the really important things with offboarding is communication,” says Nick Church, IT specialist at BetterCloud.

Remember, IT isn't the only department involved in offboarding users. Any departments that have a hand in the process—whether it's IT, operations, facilities, HR, etc.—should be communicating to ensure that everyone knows what's happening and all steps have been completed.

To facilitate this communication and reduce the risk of overlooking a critical step, consider creating an exit group/distribution list that includes the necessary departments.

“Don't count on yourself to remember everything, even if you've done it 100 times.”

Nick Church, IT specialist at BetterCloud.

Always have a checklist

“Don't count on yourself to remember everything, even if you've done it 100 times,” says Church. “Pilots make hundreds of flights, and they still go through a physical checklist. No matter how much you trust yourself, you're much less likely to skip a step if you have a checklist in front of you.”

It's never too late to start documenting all the steps. This is especially important as your company grows and offboarding becomes a more complex process.

How BetterCloud can help with offboarding

BetterCloud automates all of the granular actions necessary to fully offboard users and ensure corporate data is secure in the process. Our automated workflows, which reduce offboarding time for IT, are completely customizable to meet your company's specific requirements. BetterCloud can deprovision user accounts or listen for these activities from your existing identity or HR system, such as Okta, Workday, or Namely. When these activities occur, BetterCloud triggers an automated sequence of actions to fully offboard a user.

Thousands of customers rely on BetterCloud to automate their offboarding processes. Learn:

- Why [First Round Capital](#) said, “Even if you use Okta for deprovisioning, it can't do everything you need to do. BetterCloud picks up where Okta leaves off.”
- How [Drivy](#) reduced their offboarding time (per person) by 94% with BetterCloud
- How BetterCloud made offboarding “effortless” for [Fullscreen Media](#)

To learn more, [request a demo](#).

About BetterCloud

BetterCloud is the first SaaS Operations Management platform, empowering IT to define, remediate, and enforce management and security policies for SaaS applications. Over 2,500 customers in 60+ countries rely on BetterCloud for continuous event monitoring, threat remediation and fully automated policy enforcement. BetterCloud is headquartered in New York City with an engineering office in Atlanta, GA.

To learn more, [request a demo](#).