Social Media Asset Management Checklist

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Conduct Exit Interview

- [ ] **Schedule and conduct an exit interview** with the departing team member to gather feedback and finalize any administrative details.

Knowledge Transfer & Ownership Handover

- [ ] **Project Status & Contacts:**
  Obtain a final update on ongoing campaigns, client relationships, or special projects. Document any key details, timelines, and communication records.
- [ ] **Social Media Guidelines:**
  Ensure the team inherits all relevant brand standards, publishing calendars, content approval processes, and style guidelines managed by the departing team member.
- [ ] **Tool-Specific Handover:** Transfer administrative rights and credentials for each social media channel, analytics platform, and any specialized marketing tools.

Account & Access Management

- [ ] **Email System:**
  Change the departing user's email password; if appropriate, set up forwarding and enable an out-of-office response.
- [ ] **Project Management Software:**
  Remove or reassign any tasks, boards, or chat privileges in platforms like Teamwork, Basecamp, Asana, etc.
- [ ] **Cloud Storage:**
  Revoke access to shared folders and files on services like Google Drive or Dropbox.
- [ ] **Office/Document Collaboration Suite:** Remove or deactivate the departing user's licenses and permissions on documents, spreadsheets, presentations, or shared drives.
- [ ] **Social Media Management/Business Tools:**
  - Remove the user from social media scheduling/monitoring platforms.
  - Transfer or reschedule scheduled posts to maintain continuous publishing.
  - Confirm the departing user does not retain access to any client or agency-owned pages, accounts, or business managers.
  - Ensure at least two other employees have access to social media accounts before removing the departing employee.
- [ ] **Marketing & Analytics Platforms:**
  Revoke the user's access to ad dashboards, analytics software, tag managers, and similar services.
- [ ] **Password Managers:**
  Delete or deactivate profiles in shared credential vaults (e.g., 1Password, LastPass).
- [ ] **Creative/Design Software:**
  Reassign or deactivate any licenses (e.g., Adobe Creative Cloud, Canva).
- [ ] **Multi-Factor Authentication (MFA):**
  - Remove the user's phone number or email from MFA prompts.
  - Disable or transfer any authenticator apps or tokens associated with the departing user.

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Calendar & Scheduled Items

- [ ] **Cancel or transfer ownership** of upcoming meetings, appointments, or deadlines in shared calendars before removing the user's account.

Return & Audit Digital & Physical Assets

- [ ] **Physical Equipment:**
  Collect and secure all company devices (laptops, mobile phones, tablets), along with chargers, security badges, company credit cards and keys.
- [ ] **Digital Asset Audit:**
  - Confirm the user has relinquished any digital assets (social media credentials, branded templates, creative files, style guides).
  - Obtain proof the departing user has logged out of all company-related accounts on any personal devices. For example, ask them to show a logged-out screen or confirm removal of company credentials.
  - Update your internal asset registry to reflect the returned or reassigned resources.

Documentation Updates

- [ ] **Update** internal organizational documents (role descriptions, org charts, distribution lists) to reflect the user's departure.
- [ ] **Change or reset** any team/shared passwords that the departing member had access to.
- [ ] **Remove** the individual from the company directory, website staff listings, and any relevant email alias groups.

Final Removal from Team & Public Platforms

- [ ] **Remove or hide** any profiles or bios from the company's website, social media pages, or marketing materials.
- [ ] **Delete** the departing employee's membership in "VIP" or special access groups within social media or marketing tools.

Industry-Specific Compliance & Data Retention

- [ ] **Regulatory Requirements:**
  For heavily regulated sectors (e.g., finance, healthcare, government), confirm offboarding steps align with mandates like FINRA, HIPAA, GDPR, or other relevant regulations.
- [ ] **Data Privacy & Retention:**
  - Evaluate whether any social media data, client communications, or analytics logs must be archived for compliance.
  - Remove or anonymize personal data belonging to the departing user where required by privacy laws or internal policies.

Additional Considerations

Scheduled Content: Confirm that all future social media posts, marketing campaigns, or automated communications are reassigned to the appropriate team member.

Personal Devices: Verify the departing user no longer has company-related apps or logins on personal devices.

Legal & Compliance: Depending on your locale and industry, you may need to follow specific reporting or recordkeeping procedures. Consult with legal or HR advisors as necessary.