

cocoon

The ultimate guide to
supporting a teammate
through leave

One of the most common asks Cocoon receives from People teams and company leaders is for guidance on supporting employees through the transition away from and back to work when they take leave.

At first, it seems simple enough: an employee tells you they need to take a leave, you help them get set up, they go on leave, come back, and everyone is happy. In reality, it's often more complicated than that—but don't worry, we're here to help.

Managers are critical to an employee's experience at a company, and this is even more true surrounding a leave. Because most people take leave during a major life event (like having a baby or losing a loved one), it's important that the experience is as smooth as possible.

Through our years of research and supporting over 5,000 leaves in Cocoon, we've seen how a positive leave experience can increase employees' engagement and retention upon their return. We've also seen the enormous impact managers can have as a complement to powerful tools for creating a smooth leave experience—that's why we created this **Ultimate guide to supporting a teammate through leave** with concrete tips and guidelines to help *you* help *them*.

In this guide you'll find...

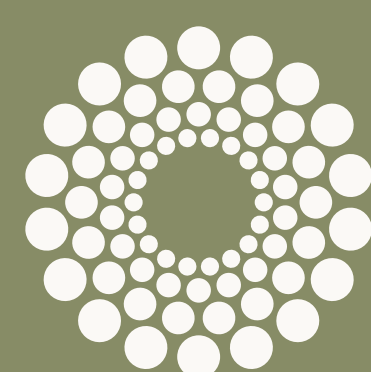
- Best practices for setting team members up for success before they go on a leave
- Tips for how to welcome a team member back from leave
- An interactive transition plan worksheet for you and your direct reports to use together
- A template to stay organized with key updates for team members when they return from leave

Set the foundation with empathy

The best way to lead with empathy is to start by asking open-ended questions. Let your team member tell you how they're feeling. Some ideas to get you started:

- How are you feeling about your upcoming leave?
- Is there anything I can do to help you feel better prepared for this transition?
- Do you have any questions or concerns about the process as you transition to leave, and then back to work?
- How can I best support you during this time?

Be flexible. One team member may really want to be kept in the loop while on leave, another may want radio silence until they're back in the office. Just because you've been through the leave process with someone else (or even yourself!) doesn't mean that experience will apply to other people. Our interactive worksheet in this guide will help frame the conversation with your team member so you can understand what works best for them.



Tip: Learn more about the importance of leading with empathy in [this article](#) written by Cocoon's CEO.

Refrain from making assumptions. Even something that seems happy (like a pregnancy) or sad (like the death of a family member) can be fraught with historical context and mixed emotions. Additionally, things like socioeconomic status, race, and gender identity can impact an experience like leave, so avoid any comparisons.

Model equity. When you think, for example, about questions you might ask an expecting mom, ask yourself if you'd ask the same of an expecting dad.

Prioritize organization

There are a lot of moving parts when someone takes leave, from ensuring you have a plan in place leading up to their leave to planning for their return to coordinating work with the rest of the team and more. To simplify the organization process, we've broken it into two parts in this guide:

- Part I: what to do before someone takes a leave
- Part II: how to welcome them back

Let's dive in.

What to do before a teammate takes leave

In this section, we'll go into detail on some of the steps you'll want to take before a team member takes a leave. Feel free to save or print out the worksheet starting on [page 12](#) for easy reference, and you can always come back here if you need more information.

1 Map out a clear logistical plan

Document specific details of your team member's leave and review them together to make sure you're on the same page. From their last day in the office to how you'll handle a hand-off if things change unexpectedly (e.g. a baby comes early), work through our worksheet together to proactively plan the leave.

2 Have your team member document their responsibilities and current projects

The smoothest way to transition someone onto leave is to have a clear understanding of the work they're doing. From there, you can determine in advance what can be redistributed amongst other team members, or whether you'll need to temporarily backfill the role.

3 Have a ramp-down plan for the entire team

Once your team member has listed all their responsibilities and projects, you can work through a “ramp-down” plan, which will likely include other team members (e.g. who will take over certain projects). It’s especially important to lead with empathy in these conversations—others on the team may see this as having work added to their plate, so make sure to prioritize honest, supportive communication when discussing any workflow changes.

4 Maintain a one-pager of key updates

Before your team member goes on leave, create a one-pager where you’ll document any important updates or milestones that happen within the team or the company. It’s easy to forget all the changes that happen over the course of several weeks or months, so take time weekly to add any relevant updates. You may want to keep your usual 1:1 meeting slot and use the time to update the document. This will be an invaluable resource for both you and your team member to reference upon their return. You can find a template to use as a starting point on [Page 13](#).

5 Talk about pay and benefits

Make sure your team member knows what they’re getting paid and at what frequency, if it’s at all different to their current pay schedule. If their leave falls within a time when bonuses are usually given, discuss what they can expect. You can work with your HR or people team to make sure everyone is on the same page.

6 Avoid reaching out

Both for legal reasons and to respect your teammate’s time on leave, avoid reaching out to them once they go on leave. This may feel awkward if something major happens, so proactively address *when* and *how* they might want you to contact them with any updates.

How to welcome a teammate back

A lot can change throughout someone's leave, both for the company and the person. Approach their return how you approached the start of their leave: with empathy and organization. Read on for concrete tips for welcoming a teammate back.

1 Get organized ahead of their return

This is when you'll reap the benefits of documenting what's changed during a teammate's leave (using the template on [Page 13](#)). Beyond keeping track of what they missed, you'll want to get organized just like you would before a new team member starts. Ask your HR team if your company has a "ramp back" program. If not, think about ways you might help an employee have more flexibility as they transition back to work. For example, maybe they can work from home certain days as they get back into the swing of things. Find out what you can provide ahead of time so you can proactively offer it to your teammate, or have answers if and when they ask for certain accommodations.

2 Listen and help them set boundaries

Just as we discussed with setting up a successful leave, it's important to really listen to your team member upon their return. Maybe they've been bored at home and are ready to take on new projects on their first day. Maybe they're still navigating sleepless nights, grief, or an injury and want to take things slowly.

Listen to what they want and do your best to create a 30-60-90 day plan that best accommodates both of your needs. You'll want to be clear on the expectations we discussed in the section above, e.g. maybe they'll be working reduced hours for the first few weeks or will be busy feeding their baby at certain times throughout the day. Be proactive by helping provide them with language for boundaries so that everyone on the team is on the same page. These could look like:

- "I have a hard stop at XX time."
- "I will not be available between noon and 1 every day."
- "I will be leaving my video off in virtual meetings."

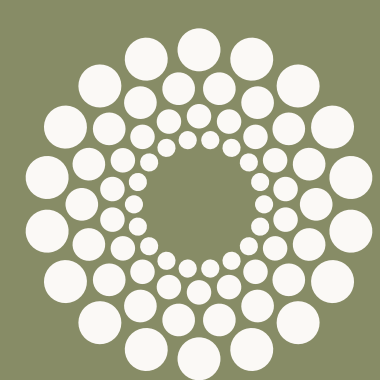
Empower your team member with language so that setting boundaries is one less thing they have to worry about.

3 Encourage community

If your team member is open to it (remember not to make assumptions), encourage them to seek community with others who have recently taken a leave. For example, if they're returning from a parental leave, you may want to highlight any parenting communities within your organization.

4 Set yourself up for success

Just by reading this guide, you're doing an amazing job as a leader and showing you really care that your team member has a successful leave. Also by reading this guide, you've probably realized that quite a bit goes into the leave process. Acknowledging that, and seeking support yourself, can go a long way.



Tip: We're our best selves when we can be honest about our boundaries and limitations. Encouraging your team member to set clear boundaries will allow them to truly show up to work as the best version of themselves.

Additionally, be upfront with both your team members and organization leaders about adjusting expectations with reduced headcount. This is ideally a conversation that happens before someone goes on leave, but it's worth having again when that person returns.

Coming back from a leave can feel overwhelming, but there is a lot a manager can do to create a more seamless experience for their team members. From active listening to co-creating a back to work plan, welcoming someone back from leave is a team effort.

You've got this

By getting organized, leading with empathy, and communicating early and often with your team member, you will help set them up for a successful leave. Ensuring someone has a successful leave is an important part of being a manager, but there are a lot of moving parts.

Use our worksheets below to get started.

Leave transition plan for

This leave plan worksheet is intended to be a collaborative document where you and your team member can work together to ensure a smooth transition into their leave, and when they return to work.

We recommend sharing this with your team member to review and begin filling out in private. Then, set up a 1:1 meeting (make sure you allow enough time) to discuss their answers and collaboratively work through the rest. You may even want to consider two meetings: one dedicated to the logistics of handing off work and one dedicated to how you can best support them through the transition.

As time progresses, it's incredibly likely that some of the decisions and preferences you discussed will need to be revisited—that's OK! It's important for both of you to remain flexible, and be communicative with any changing priorities or circumstances.

Work through these questions as accurately as you can; knowing that some details will likely change over the coming days, weeks, and months

Leave dates

Team member

Fill out the below details about your leave to the best of your ability. It's ok if some of the details change over the coming days, weeks, and months.

Planned leave start date

Planned return to work date

What circumstances might arise that would change those dates?

When do I want to start handing over responsibilities and clearing my calendar?

Collaboratively

Discuss your plans for unexpected changes to your leave.

If the team member's return to work date changes, how should they communicate the change?

If leave begins sooner than anticipated, how we will ensure a smooth transition?

If leave begins later than anticipated, what are the team member's responsibilities?

Responsibilities

Team member: List core responsibilities and any projects you’re currently working on.

Collaboratively: Discuss what needs to be taken on by other team members and who that should be. Keep in mind there may be projects that can’t be taken on by your team and you’ll need to hire outside resources to support. There may be some projects that are okay to put on hold.

| Responsibility | Transition to |
|----------------|---------------|
| | |
| | |
| | |
| | |
| | |

| Responsibility | Transition to |
|----------------|---------------|
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |

Projects

Team member: For each project and/or responsibility you listed on the last page, create a shared document with the following details. Make sure this document is shared with your manager, anyone taking on work, and relevant stakeholders so everyone can stay in the loop. This is also a good time to double check that everyone has access to any associated documents or systems.

- Project description
- What needs to happen while I’m on leave?
 - Must happen
 - Should happen
 - Nice to have
- Who are the important collaborators and/or stakeholders?
- Who is the point of contact for any inquiries while I’m on leave?

Manager: For each project and/or responsibility consider the details below. When you communicate transitioning responsibilities to other team members make sure you maintain a positive and supportive environment for everyone to avoid overwhelming team members.

- Who are we handing responsibilities over to? How will this be communicated?
- What does a successful handover look like?
- What team or company goals might this impact?

Collaboratively: For big or particularly complex projects you may want to set up transition meetings with relevant team members. Use the document you created to guide that conversation.

Pay

Manager: Before your 1:1 make sure you understand how much and when your team member will be paid while they’re on leave. If you’re not the right person or if your team member has more questions, list the right point of contact below.

Collaboratively: Are there any variable compensation considerations we need to address? Bonuses? Commission?

Software and tools

Team member: List any licenses or subscriptions you’ll need to turn off or hand over while you’re away. Note any that you will need to be re-credentialed for when you return.

| Tool | Status |
|------|--------|
| | |
| | |
| | |
| | |
| | |

Manager support

Team member: Think about what you need from your manager to ease your transition.

What is the best way for your manager to support you right now?

As you get closer to leave?

While on leave?

When you return?

Contact preferences

Team member: It is incredibly normal—and often encouraged—to completely unplug from work while you are on leave. However, if there are certain things you’d like to keep up with while you’re gone, here’s where you can think about your preferences for what sort of news you’d want, when in your leave you’d like to hear about it, and what method you’d most prefer to be contacted in.

What information do you want to hear about while you are on leave? (select all the apply)

- ☐ Nothing
- ☐ New and departed team members
- ☐ New and departed clients
- ☐ Changes in my team s tructure and/or manager
- ☐ Major company policy changes and/or reorgs
- ☐ Time-sensitive deadlines to apply for benefits
- ☐ Plans for my reentry into my role
- ☐ Changes to my role or responsibilities
- ☐ Opportunities for promotion
- ☐ Other

How would you prefer to have this information shared with you?

- ☐ By email
- ☐ By text
- ☐ By phone call/voicemail
- ☐ By meeting (schedule by email)
- ☐ In shared transition document
- ☐ Other

During which period(s) of your leave are you comfortable being contacted? (select all that apply)

- ☐ First third of my leave
- ☐ Middle third of my leave
- ☐ Final third of my leave
- ☐ Other

With what level of frequency are you comfortable being contacted (within the parameters of what you selected above)?

- ☐ Never
- ☐ Maximum 1x every 2 months
- ☐ 1x during entire leave
- ☐ Maximum 1x each month
- ☐ 2x during entire leave
- ☐ Other
- ☐ 3x during entire leave

Staying organized while a team member is on leave

Staying organized ahead of a team members' return helps ensure a smoother transition back to work. It's much easier to keep an ongoing one-pager rather than scrambling to remember everything that's happened right before their return.

Use the template on the next page as a starting point to keep track of important changes and project updates. We recommend keeping your regularly scheduled 1:1 time on the calendar while a team member is out on leave and using the time to update the document.

Remember that returning from a leave can feel overwhelming. Make it clear to your team member that they're not expected to jump in 100% the first day they're back. Spend time discussing the updates you put together live so you can answer any questions and help your team member prioritize what's most important.

Company updates

- Company updates
- Updates to company goals or OKRs
- Major launches or customers signed (as relevant)
- Changes to benefits and/or upcoming benefits deadlines
- Other notable company announcements

Team updates

- Team updates
- New team members
- Departed (or soon-departing) team members
- Open roles & hiring plans
- Team role changes & promotions, reorgs, or restructures
- Relevant changes on other teams you work closely with

Project updates

Reference the projects and responsibilities you and your team member listed together on page 14 as a starting point for what they may need updates on upon their return.

- Project status
- Project priority as it relates to company/team goals
- Relevant stakeholders
- Important dates

- Current blockers
- Plan for team member contributing to or leading project

Ramp-back expectations

Plan to discuss these directly with your team member upon their return (or before, based on their preference).

- In-office v. remote days
- Is a flexible schedule an option?
- How quickly should they jump back into projects?
- 30-60-90 day plan

Resources for support

This is an opportunity to gently direct your team member to additional support they may need upon returning to work.

Consult with your People team to understand what's available at your company.

- Relevant employee resource groups (ERGs) or Slack channels
- Information on spaces available for pumping or other medical needs
- Benefits available to support team members (e.g. mental health support, parenting benefits, support navigating benefits)