

cocoon

Employee and manager
Leave transition
plan template



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?

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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
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

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 structure 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