

★ PLAYBOOK ★

HOW TO SUPPORT YOUR
TEAM MEMBERS THROUGH
LIFE'S BIG MOMENTS



If you're reading this, congratulations! You are the type of leader who cares deeply and is committed to your people.

This playbook will support you in living into that commitment. Life is full of big moments – and odds are, your employees will look to you for support during the good – welcoming children, moving cities – and the challenging – dealing with infertility or bereavement and loss.

We're here to make it *just a little easier* for you to support your teams in the best way possible.

“Many employees call having a child the most important pitch point in their career. Don't let your people play the manager lottery leaving the organization vulnerable to losing a valued teammate.”

– Sarah Olin, LUMO Leadership

We'll cover a few things.

#1: How you can create psychological safety on your team

#2: How you personally can support your employees – both those going through life's big moments and those who might be backfilling for their coworkers on leave

#3: How your organizations can systemically support your employees with policies and advocacy

Creating Psychological Safety

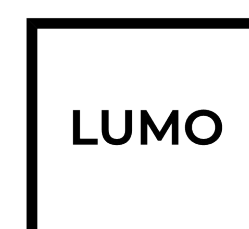
The goal here is radical empathy in service of team building, living the company commitments and values, and increasing the overall joy and productivity at work

Set your values-based team culture & behaviors

Connecting the values and mission of the organization to your leadership approach supports you and your team in meeting a common goal. And regardless of your organization's values, a leader's values must include a level of commitment to empathy, relationship, charitable assumption, open communication, trust and inclusivity. Cultivating these values – and the behaviors and ways of working that align with them – needs to be part of your routine as a leader. Time spent building or reinforcing this foundation will help give your team empowerment, focus and direction – as well as security and psychological safety.

If any of these has ever been an issue – on your team or across the organization – you're going to have some definite course correction to do culturally:

- There has been direct or indirect retaliation against employees who take their provided leave – e.g, lower performance reviews, getting passed up for promotions or projects
- Employees with commission compensation structures who take extended leaves have had their deals “covered” by other team members and have missed out on comp if those deals are signed while they're out
- Other employees refer to leave as “vacation” or “time off”



To be specific...

1. Get an accurate picture of your cultural starting point by hosting interviews and running a survey with your team members
2. Digest this starting point – be curious rather than defensive – and start to identify what might need to change
3. Bring your team together to collectively build your team culture in a workshop setting
 - a. Level set on where you're starting from
 - b. Identify where you want to go – co-creation is key here! This is not a time to be directive
 - c. Discuss what needs to start, stop, and continue today in order for that future to be the reality
4. Be specific in your next steps –
5. Then, follow through
 - o Make changes
 - o Track how you're moving toward your desired future state – we love pulse surveys here!
6. And keep following through...
 - o Use your 1:1s and team meetings to do gut check and have real talk on what continues to work and what might need tweaking

WE CAN HELP

We're always here to prepare for and facilitate team conversations. And check out [this helpful worksheet](#) from LUMO.

Personally Supporting Your Team Members

Both those going through the big changes and
those who aren't (at that moment)



#1 Ensure your employees know that they have official support in the first place

Don't rely on your HR Business Partner. You, as the manager, need to know what your benefits are and tell your teams about them!

And as a marketing expert, you should feel more than comfortable sharing feedback with your CHRO and People teams on how they might make this information clear – and even exciting!

DID YOU KNOW?

According to the CDC, Employee Assistance Programs are offered by 97% of large employers, but **only 5.5% of employees use them**, even though it is free and completely voluntary

#2 Make preparing for any leave easy

Make the actual process of submitting for leave coverage seamless. Again, don't rely on your HR Business Partner. You need to have at least a basic understanding of how the process works:

- What coverage is provided by the company?
- Who are your leave partners?
- How does the employee initiate a request?
- How much work is the employee required to do?
 - Imagine you're trying to navigate this quickly, when you're already stressed. It should require the minimum amount of work
- Is the process *clearly* documented?
 - Push your HRBP to make it better
 - Have a conversation with your CHRO or CPO peer to champion this
 - Remember: employee experience is a huge brand builder, so you *need* to get involved

And give them templates (e.g., coverage plan) to easily plug and play.

WE CAN HELP

Here's a [coverage plan template](#) & here are some [away messages](#) we like! Check out LUMO's [Crucial Conversations](#) and [Leave Agreements](#) worksheets as well.



#3 Honor the leave & show empathy

Don't bother them. Seriously.

That's it. That's the post.

Bonus points if you work with IT to set up their inboxes to auto delete for any messages received while they are out!

If they're welcoming a baby:
Send them a gift from their registry and a food delivery gift card when Baby arrives.

If they're working through loss:
Send flowers and pay for a few months of a meditation or therapy service.



#4 Ease the returns

Returning from leave is a huge moment of upheaval and transition. Again, please don't rely on HR to make re-entry smooth for your team members.

It's your responsibility to help your returning team member regain confidence in their work (especially important if the leave was long) and feel invested in, valued and set up for success.

1. Help them identify some quick wins to help them regain any confidence they may have lost while out
2. Map out a growth plan for them so that they know you're still invested in them and their career trajectory
3. Realign with them on what they want to get out of their job. Their intentions might be different from before their leave, as they likely have experienced a huge shift in perspective. Don't assume that they want or are motivated by the same things that they were before

#5 Be there for the employees who are at work every day

Plan for leave openly as a group – and ask your team for feedback before, during and after. In addition to asking open-ended questions, we love pulse surveys to gather data and track trends over time.

Before: “Let's talk about your thoughts on covering XYZ while Michelle is out on leave? What does support look like? Here's what I can commit to you...”

During: “How are you feeling about the current workload? What kind of support do you need? From me? From others?”

Note: If you need to hire temp support, do it, *swiftly*.

After: “What worked what didn't work? Look at support structures, resources, and communications.. Next time, what should we do differently?”

Shoulder additional work with them – as a partner. Put yourself on the coverage plan!

Spend the time to still know what's going on in their lives – even if it's not a “huge moment,” show that you celebrate the little things with them too (obviously tons of these tips can apply to vacation time as well).

We hope this one is obvious: don't penalize your employees for someone else's leave by clawing back vacation time or extending hours



Systemically Supporting Your Team Members

This means with formal policies & advocacy



#1 Advocate for benefits & policies before they're needed

Some examples:

- Equity in policies for all parents and caregivers – birthing parents, adoptive parents, etc. regardless of tenure or level
- Benefits that allow for employees to continue accruing vacation days, commissions and bonuses
- Supplementary benefits for birthing parents – lactation consultants, pelvic floor therapists, etc.
- Miscarriage and pregnancy loss leave
- Fertility benefits and leave
- Abortion support and leave
- Childcare subsidies
- Covered therapy sessions, massage, acupuncture

USE YOUR PLATFORM TO PUBLICIZE YOUR COMPETITIVE EDGE

Look no further than the #ShowUsYourLeave campaign that took LinkedIn by storm. You should use your personal platform & social media to showcase your benefits to the world and spark conversation.



#2 Share cultural practices with your C-suite peers

Be a change agent by sharing what you do – even the things that you don't get right. Ideally you already have honest and open dialogue amongst your peers and with your boss / CEO.

This means sharing the playbooks and templates but also your cultural practices and norms. Get them on board by sharing the impact this has had on your team – through stories and data (pulse surveys on employee satisfaction and engagement go a long way to prove things like this out!)

WE CAN HELP

We're always here to help you prepare for and facilitate peer conversations.



#3 Drive whole-company conversations

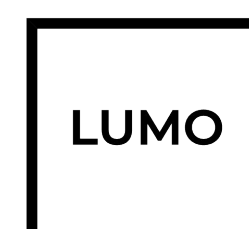
CMOs are taking on more remit related to employee experience and employer brand, and given this, you have more permission than ever to push the conversation within your companies and externally.

Consider sponsoring an employee resource group (ERG) to help employees navigate different types of leave.

Encourage those ERGs to compile shareable resources – for example, a parent ERG could crowdsource and compile childcare options that can be shared with expectant parents.

Or go even bigger. Cancel all meetings for an entire day and bring together your whole organization to talk about this topic.

We love the example that [Starbucks](#) set when they closed 8,000 shops in order to bring 175,000 employees through a racial bias training program.



#4 Use your platform and purchasing power

Call out others that aren't doing enough for their employees.

Put pressure on others to improve by requiring vendors to meet certain requirements (e.g., we only do business with companies that provide a minimum of 12 weeks paid maternity leave).

Think twice about doing business with state governments in places that don't support access to reproductive care

We'd love to hear from you.

Ok, that's it! We'd love to hear from you if you found this helpful – or if there are things we missed. Parenthood should be a team sport.

You know... "it takes a village" and all. Leadership is not just about waiting for the village to present itself; it's about creating the village that you want and need.



About LUMO

When it comes to parental leave, it's often uncharted territory for all involved. From HR leaders to managers to employees themselves, this transition can be overwhelming, confusing and disruptive – leading to losses in retention, productivity and careers. But it doesn't have to be that way.

LUMO is the leading solution for progressive organizations that understand supporting employees through this transition isn't just good to do – it's good for business.

Only LUMO was created by coaching, DEI and career transformation professionals. From curriculum to coaching to community, LUMO is a trusted advisor and partner to client companies across industries. And with over 50 years of combined experience in supporting parents through this transition effectively, their proven approach leads to more consistent retention, improved productivity and better outcomes overall for both employers and employees.

WORKSHEET 1

Employee Relationships

Use the worksheet on the following page to assess your strengths in the areas discussed. For each employee you supervise, score your relationship in the following areas on a scale of 1 to 5.. After completing this worksheet, for each employee, choose an action you would like to take in service of improving your relationship with this employee.

Example: Trust

I notice that I tend to micromanage Charles when I delegate a project to him. With his going on parental leave, I check in on the status of his projects and tasks more than I have with other employees. There is an opportunity for me to extend Charles more trust and micromanage less. I will meet with him to set a plan for checking in and stick to it. I will ask Charles what additional support is needed.

Instructions: Copy this worksheet as many times as needed to assess your relationship with all employees you supervise. Score your relationship with this employee in the following areas on a scale of 1 to 5 (1 = not established, 5 = well established) and define your actions to take.

Employee _____

	Score	What's going well?	What could be better?	Action to take
Empathy				
Trust				
Generosity & Charitable Assumption				

WORKSHEET 2

Crucial Conversations

CRUCIAL CONVERSATION STARTERS:

Disclaimer: Every company has a unique approach to their employee leave processes. This material is to be used in conjunction with your company's established policies surrounding leave, including all applicable state and federally regulated laws. Please consult with your company's Human Resources Department or policy administrator.

1. What is your plan for leave?
2. How can I support you in leaving the team and company better in your absence?
3. What is most important while you are on your leave?
4. What do you need during your transition to leave?
5. How are you getting supported before, during, and after leave?
6. What are your expectations of me while you are out on leave?
7. What do you need upon return?
8. Are you aware of company policies around leave?
9. Is there anything you'd like to discuss with me that we haven't talked about yet?

PREPARING FOR CRUCIAL CONVERSATIONS:

	YES	NO
Are you calm and open? Ready to connect?		
Are you clear on what you hope to accomplish by having this conversation?		
Are you relationship to the person as a capable partner?		
Are you ready to brainstorm or reach across the table to support their person and their perspective – even if it doesn't match your own?		
Are you ready to discuss the topic without trying to prove a point or change the other person?		
Are you ready to listen and collaborate?		
Are you ready to hear new ideas?		
Will your attitude support learning, sharing and problem-solving?		
Have you created a safe environment for your direct report to share their thoughts and concerns?		

WORKSHEET 3

Leave Agreements

THOUGHT STARTERS

Disclaimer: Every company has a unique approach to their employee leave processes. This material is to be used in conjunction with your company's established policies surrounding leave, including all applicable state and federally regulated laws. Please consult with your company's Human Resources Department or policy administrator.

1. What agreements do you currently have with your employee for their leave?
2. What agreements have been created with the members of the team supporting the employee on leave?
3. What agreements need to be created in order for you and your leave employee to be prepared?

LEAVE PLANNING CHECKLIST

	COMPLETE	IN PROGRESS	NOT STARTED
My employee and I have co-created (in writing) a leave plan that supports us both			
I am clear on what is most important to my employee in regard to their leave			
I have an overall understanding of our company's policies around leave			
I have an HR point of contact for questions and concerns			
My employee has an overall understanding of our company's policies around leave			
My employee has an HR point of contact for questions and concerns			
I am clear on my employee's exit plan			
I am clear on my employee's plan for returning from leave			
The team is clear on my employee's exit plan			
The team is clear on my employee's plan for returning from leave			
I have communicated to my employee my intentions for connecting during their return from leave			