

★ PLAYBOOK ★

HOW TO PREPARE FOR PARENTAL LEAVE AS A CMO

If you're reading this, congratulations! You are going to soon be welcoming a new life.

This is a major time of transition, and we're here to make it *just a little easier*.

Our hope is that there will be more intentional leave by execs in the future – as more, younger CMOs/CEOs feeling more empowered to become parents; more execs need to take leave to care for an ailing parent; more execs take sabbatical leave to do something interesting; etc.

And of course intentional leave requires planning, especially for those in the C-Suite. This playbook will help you prepare for a powerful parental leave experience – but know this can be adaptable to any executive leave.

TLDR: Parental leave, like any other life experience, can be created from your highest and best commitments or from fear, control and shoulds. We suggest the former.

As your bandwidth decreases and your needs increase there is an opportunity to communicate with your team around providing you with meaningful support.

What would it look like for you to be fully supported as an executive? How do you need to prepare your team for your leave? What intentions have you set for your leave period? What will make those intentions come to be?

Let's make this real with eight plays.





#1 Set the Foundation

There are two important foundations here:

1. **Your team's culture** – this includes a gut check of your team's culture, behaviors and ways of working. Ideally, this is part of your routine as a leader, but if it's not, upcoming leave is a clear impetus. Time spent building or reinforcing this foundation will help both give you peace of mind and give your team empowerment, focus and direction.
2. **Your personal intentions** – this includes defining success for yourself around what a great leave experience looks like to you. Once you are clear, there is an opportunity to invite your team into a conversation.

We recommend that you let your team know your news as soon as you are comfortable. This gives you ample time to plan, and it sets a cultural norm around not needing to hide pregnancy out of fear (of being passed up for projects or promotions).

Note: if keeping pregnancy a secret is a cultural norm at your place of work and you fear retaliation, then consider speaking with a labor & employment attorney and your HR representative. Also, *yikes*.

WE CAN HELP

A team diagnostic snapshot and workshop is a great way to thoughtfully set the right cultural foundation.

And LUMO can help with 1:1 speciality coaching and programs for expecting parents and managers.



#2 Get Organized

Create a template to capture your coverage plan as soon as the news is out there. It's easier to add things as you think of them. Your mind will definitely be otherwise occupied as you near the end of your pregnancy.

There are a few big categories of things to include:

- Meetings & Events
- Decision Rights
- Budget Approvals
- People & Stakeholder Management
- Hiring & Onboarding
- Your Priorities

Let's talk about each.

WE CAN HELP

[Here's a template you can use](#) & we love [this planning checklist](#) from LUMO



#2 Get Organized

MEETINGS & EVENTS

Think of the report-outs to your CEO, Board meetings, conferences and industry events that will happen while you're on leave.

Outline the plan for each clearly in your file. Don't forget to have your executive assistant share all the meeting details with your delegates.

These are the questions to ask:

- What's the expected role for each? An attendee for awareness or a presenter?
- For attendee roles, it's easy to send a delegate to capture and share out information, assuming there is budget and business need.
- For any you'd typically present / share some information at, which can a delegate cover?
 - What will they need in advance to be successful?
Organizational context, etc.
 - How can they shadow you in advance to see the process behind the scenes? (This is particularly necessary in organizations with formal Board prep processes)
- Which will you just skip until your return?



#2 Get Organized

DECISION RIGHTS

We think this is actually the most important thing for C-suite executives to clarify before leave, since this takes a lot of EQ.

These are the questions to ask:

- What decisions are you comfortable with a team or peer making on your behalf?
- Are you at risk of walking back a decision on this topic upon your return if you don't agree with the original decision that was made?
 - If the answer could be yes, retain ownership of that. It's important to use your leave as a moment of empowerment for others - and to build on that empowerment once you're back. Don't self-sabotage.
- For decisions that you must be consulted for or must make yourself, how should those work?
 - Will the decision need to be made before you leave?
 - If yes, what information do you need to make the decision before you go out on leave?
 - If that information changes while you're out or sh*t hits the fan, what happens?
- What decisions should wait until you return?
- What decisions are ok for the team to contact you about while you're out, if any?

WE CAN HELP

Run a team decisioning session if delegation and decision making isn't always super clear.

[LUMO's Parental Leave Advantage Program](#) has lessons on creating powerful agreements and operating from intentions vs. expectations.



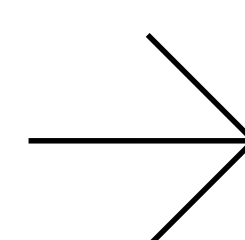
#2 Get Organized

BUDGET APPROVALS

Of course, here there are knowns and unknowns. If you're going to be out during the budgeting season, this will require more planning in advance, and this is an opportunity to get supported from other departments or gain clarity of there is a gap in process.

The main question is: who has authorization to make budget decisions on your behalf? Your team members are probably already empowered – strongly suggest ensuring this – to make decisions up to a certain price point. How does that need to flex given your leave?

Outline the plan and share it with your boss for sign-off and awareness.



In some organizations, this may require a policy change to provide someone else with delegation of authority (DOA) to authorize certain approvals or purchases.

#2 Get Organized

PEOPLE & STAKEHOLDER MANAGEMENT

Your team is going to miss you!! Most critically, if you will be out during a performance review cycle, prioritize documenting your reviews well in advance. It's important that team members aren't "penalized" by having someone fill in for this.

There are also a few ways to handle recurring 1:1s with your directs during your leave:

- Institute skip-levels on a rotating team basis (e.g., your boss has a 1:1 with a different one of your directs each month)
- Ask a peer who you trust to be available for mentorship conversations as needed

Stakeholder relationships require more time and soft skills to "hand off." We often hear from CMOs that it's difficult to have team members take over strategic stakeholder relationships – both within the organization and externally – *even when you're around full-time.*

But leave is a really good opportunity for you to *just let go* and practice trust. Trusting others and trusting the process. An opportunity for team members to step up and step into their leadership. Make sure you are speaking about people and stakeholder management as the awesome opportunity it is.

Sure, your delegate isn't going to have the exact relationship with someone that you do. It will take time for them to get to know each other and reach a place where they can have real talk.

It's important that you give up a little bit of control and allow your team members to build those relationships themselves.



#2 Get Organized

HIRING & ONBOARDING

If you need to be hiring for a key role during your leave... *do you really?*

Ok, fine. If it's really that pressing and you won't be there to interview them, it's critical that you identify delegates you trust to make those decisions on your behalf. These are major calls. Don't delegate to someone who thinks just like you, either. Use this as an opportunity to challenge your affinity bias.

That said, if this person is a direct report hire, we recommend either accelerating hiring or slowing your roll. You should be involved.

If a new hire is set to join the team while you're out, do everything you can to prepare for their arrival in advance.

WE CAN HELP

[Check out our guide on always-on onboarding](#). And be sure to complete [this worksheet](#) from LUMO – it's a great tool to help you set your intentions.



#2 Get Organized

YOUR PRIORITIES

Feel free to wait until closer to your leave to “finalize” these, but we recommend outlining your priorities sooner than later – then revisiting closer to your leave.

Outline the 3-4 things you really care about and write them down.

What does success for each look like? This will help give your team a north star while you’re gone, and it gives them permission to de-prioritize items that don’t relate to your top priorities using their discretion while you’re out.



#2 Get Organized

Phew.

Now, share your coverage plan publicly to be sure direct reports and their direct reports know how to operate while you are away. Share backfill details and decision rights before you leave so that team members have an opportunity to ask questions before you step away. Publish your plans in a public space/forum.

This helps others normalize this transition period and feel safe and encouraged to do the same when they have a life event that takes them away from work on leave.

WE CAN HELP

[Here's a template you can use.](#) We also love [LUMO's parental leave checklist.](#)



#3 Set Communication Expectations & Boundaries

We believe in true disconnection. It's better for you and your team, and *not disconnecting* may in some cases put your coverage at risk.

But of course, your team is going to want to know that you and Baby are safe and healthy! So, let someone (your assistant, Chief of Staff or your team's HR business partner) know if and how they should expect to hear from you once your baby is born. Will you share an update via email, text message or phone call? Does that individual have permission to cascade to others?

Also share with a key point person how other people can send congratulatory messages to you: by mail, text, email or social media.

Then, work with your assistant / IT to set up your email inbox to auto-sort messages received while on leave. Bonus points if you set up an auto-delete rule.

HERE'S A SAMPLE AWAY MESSAGE

Thank you for the message. I am currently on parental leave celebrating the arrival of a new little life. I am not monitoring my emails, and all emails sent to this mailbox will be deleted prior to my return. Please contact [name of person] in my absence. Thank you.



#3 Set Communication Expectations & Boundaries

And if you must receive some updates while you're out, here's what we recommend:

- Pick a single point person
- Set an expected cadence for when you will plan to check in with them; say, every six weeks
- Make it clear that you'll always be the one to initiate any contact
- Ask them to aggregate critical updates from across the team in advance of speaking with you – this is not a time for status updates
- Frame these update conversations clearly; you'll provide thought partnership and guidance, but any follow-ups resulting from the conversations are the responsibility of the point person to disseminate and track across the team

WE CAN HELP

To dive deeper into setting expectations, creating powerful agreements and boundaries, reach out to the LUMO team to schedule a consultation.



#3 Set Communication Expectations & Boundaries

Determine and share how you want to be brought up to speed when you're back. We're guessing you *probably* won't find sifting through months of random emails to be particularly helpful. Direct your team to make it as simple as possible to capture the information you need – nothing more or less.

WE CAN HELP

You guessed it. [Another template.](#)

- Have your primary delegate set up a shared document that can be accessed across the team
- Outline these sections for the whole team to add to throughout your leave
 - Things that you should know about (changes to plan, shifts/pivots)
 - Issues that have come up and how they handled them
 - Things that they are proud of that they want you to know about
- Encourage the team to treat this like a live journal
- Your team should edit this the week before your return back to work
- A link to the file should be sitting in your inbox or in a Slack message when you first sign on



#4 Adjust *Before* Baby Arrives

You've already had your coverage plan mostly-built, if not "finalized," for months.

A month prior to your due date, ensure you have someone else on all important meetings and emails, just in case. Babies have a sneaky way of arriving right when it's least convenient!

Also, start to practice disconnecting a few weeks before your due date. Use nights and weekends to build the muscle of being unavailable – for yourself and your team.

Two weeks prior, enact your coverage plan and become a "shadow operation" to test your coverage plan out. But refrain from critiquing decisions; instead ask clarifying questions. This allows you to understand how your delegates see things and gives you an opportunity for constructive conversation.

And if Baby comes early and you didn't do any of this yet, no worries; you published your coverage plan weeks ago and you've been empowering your team and leading with intention for months!

Also, some organizations are starting to offer prepartum leave. If yours does, take it as much as you're able to.



#5 Disconnect

Full stop: we believe in taking the total amount of leave that you are provided as part of your work policy. With that...

Go ahead and remove all work applications from your personal phone. If you have a work phone, let it run out of charge. And please don't say you'll be unavailable and then jump in on an email or Slack message.

Remember, you're also setting precedent for how your organization treats parents on parental leave at all levels.



#6 Test & Learn Before Your Re-Entry

We have a few tips here:

- Set up your child care and routine two weeks before your actual return.
- Schedule in some self-care (a spa day, a long lunch with a good book) while your child is at daycare or with a nanny.
- If you have a partner, particularly a partner who also works, set expectations around how you'll handle and share responsibility for things like: sick days (how will you determine who takes off work?); childcare drop-offs and pick-ups; routine household management tasks.
- Consider instituting a weekly partner meeting on Sundays to block and tackle for the upcoming week.

WE CAN HELP

Check out [this helpful worksheet](#) from LUMO – it's a great tool to help you evaluate your support needs.



#7 Ramp Up Intentionally

Please set realistic expectations for yourself and your team. Even if you are already a parent and are welcoming baby #2, #3, #4, etc., this is still a huge time of transition and healing. Things are going to look different for you right away - and they should!

On your first day back, these are really the only things you should do: work with your EA to block your calendar for kid duty and pumping time, as needed, and reserve space for pumping in your office. And take down that away message!

Then ramp up slowly over the course of the several weeks so that you can acclimate more easily. We recommend holding off on all meetings – other than 1:1s with your direct reports and boss – until week three. And even then, add them back in slowly. Be incredibly discerning about the things you add back to your calendar.

If one of your point people did a phenomenal job managing something, let them keep going with it! It's empowering to them and frees up your time to focus on the things that really require your attention.



#7 Ramp Up Intentionally

At the end of your first 30 days back, block time for a little retrospective. Ask yourself these questions:

- Am I spending my time at work in a way that energizes me?
- What do I want to do more of?
What do I want to do less of?
What can I change next week / next month to make that happen?
- Is the culture on my team aligned with our company values? Are people thriving in the current culture? Are our behaviors and ways of working still designed right for my organization? Are we living these things, truly?

We recommend re-running that team diagnostic that you also did during your leave planning. It's a great moment for recalibration.

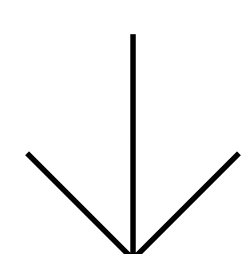
WE CAN HELP

But you already knew that... Both Black Glass and LUMO help companies develop and maintain strong cultures. If your culture needs a tune up, we're just a conversation away.



#8 Use Your Experience

Think about this final play as part of establishing your legacy. You've just gone through a transformative human experience – and you have a lot of learnings to share! You probably also realized where many things about the current system for supporting expectant and new parents is broken. Those things include some things you can influence and many you cannot.



If your organization is resistant to changes – or worse, if you realize your organization showed blatant disregard for your privacy and time away during your leave – you should question if it's time to move on.

Let's think about the things you *can* influence:

- Work with HR to update corporate policies around working from home and flexible hours. Don't forget about policies that provide fertility support, coverage for abortion access and time off for pregnancy loss.
- Champion adding child care subsidies to the benefits provided to all working parents.
- Speak openly, if you are comfortable, about your experiences as a parent with a career outside the home.
- Advocate for adding nursing rooms at the office, if your organization doesn't have them already ([More on the PUMP Act](#)).
- Share companies like LUMO with HR & benefits leaders... and thank your lucky stars that companies like this exist to help employers support their employees powerfully.

Checklist

Last thing. Here's a little checklist to help you keep track of what to tackle & when. You got this!

6 months before Baby	<ul style="list-style-type: none"> • Share news with your team • Run a team diagnostic & evaluate the results • Host a team workshop to set the right foundation before your leave • Start your coverage plan
3 months before Baby	<ul style="list-style-type: none"> • Post your coverage plan (even WIP) to a shared location • Notify delegates of roles and expectations
2 months before Baby	<ul style="list-style-type: none"> • Add someone else to critical meetings and emails • Continue to refine coverage plan as needed • Share your communication expectations with your team
2 weeks before Baby	<ul style="list-style-type: none"> • Start to enact your coverage plan • Get your away message ready
2 weeks prior to re-entry	<ul style="list-style-type: none"> • Start your childcare • Spend some time on selfcare • Get organized with your partner (if applicable)
After re-entry	<p>Right away:</p> <ul style="list-style-type: none"> • Block your calendar for kid duty and pumping time, as needed • Reserve space for pumping in your office • Take down your away message <p>Week 3:</p> <ul style="list-style-type: none"> • Start taking meetings again <p>30-60 days:</p> <ul style="list-style-type: none"> • Do a personal retrospective • Run another team diagnostic • Share learnings and start thinking about you might make changes across your organization

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 (1 of 2)

Conditions of Satisfaction

Do you remember when you were looking for your last house or apartment? You likely had a list of **MUST HAVES** (or non-negotiables) vs. **NICE TO HAVES** (things you want but can live without). You likely used these lists as guideposts to help you make the final decision on where to live. Example:

MUST HAVES:

- 3 bedrooms
- 2 full baths/1 half bath
- Safety ramps
- Hand-rails in the shower
- 30 minute commute to office

NICE TO HAVES:

- 3 full baths
- Crown molding
- 20 minute commute to the office
- Laundry on main floor
- Outside space for gathering

The thing about conditions of satisfaction (COS) is that every now and then we get overwhelmed or confused as a result of our fears, or by what we think we should want, have, or do. We find that writing it out helps you discern what matters most to you, and how to bring those conditions to life.

Instructions: Consider your “MUST HAVE” and “NICE TO HAVE” conditions for each phase of this journey and note them below.

As you consider and create your COS, ask yourself: What is the experience you intend to create during this time in your life?

PARENTAL LEAVE:

Intention: _____

MUST HAVES	NICE TO HAVES



WORKSHEET 1 (2 of 2)

Conditions of Satisfaction

CHILDCARE:

Intention: _____

MUST HAVES	NICE TO HAVES

SELF-CARE AS A PARENT:

Intention: _____

MUST HAVES	NICE TO HAVES

RETURN TO WORK:

Intention: _____

MUST HAVES	NICE TO HAVES

WORKSHEET 2

Creating Support

At LUMO, we believe that **AWARENESS + ACTION + SUPPORT = RESULTS**. So far there has been a ton of awareness created about this huge change that is happening for you (yay!) and lots of actions have been recommended, however, we know that without the appropriate **SUPPORT**, the results have a high likelihood of falling short. This tool is a simple way to access what areas of your life – yes, all of it! – you may need to prop up with some extra support during this very exciting time.

Places to look:

- Emotionally
- Physically
- Spiritually
- Mentally
- Romantically
- Financially
- Professionally
- Domestic tasks/housework
- Parenting
- Goals and dreams

Where are you in need of support?

List actions you can take to get the support you need.

Undersupported area:

Action:

Undersupported area:

Action:

Undersupported area:

Action: