



PARENTAL LEAVE POWER UP:

A Practical Playbook for Expecting Parents

josie*



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TLDR: IF YOU ONLY
READ ONE THING

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TLDR: If you only read *one* thing.

IT'S A BUSY TIME - WE
GET IT! FOR THE TIME-
PRESSED, HERE IS A
SUGGESTED PUNCH LIST OF
WHAT TO DO BEFORE
LEAVE:

Paperwork / Benefits: If the answer to any of the questions below are “no” or “not sure”, please contact your HR representative as soon as possible (and we recognize that not all of these may apply to you!):

- Are you familiar with how you will be compensated during your leave?
- Have you completed all of your leave paperwork?
- Do you know how to add your child to your health insurance plan?
- Does your state provide Paid Family Leave, and if so, how does that integrate with your employer's leave benefits? If you're unsure, check out [this guide](#) from our friends at Parento.
- Are you familiar with all the programs, policies, and benefits at your organization for parents? Commonly overlooked examples include new parent support groups / employee resource groups, breastfeeding support, breastmilk shipping / reimbursement services, accommodations for pumping milk, Chat Channels for new parents, childcare benefits, mental health benefits, Employee Assistant Programs (EAPs) and Flexible Spending Accounts.



Communication

- **Transition planning:** Be sure to think through your current projects, deliverables, clients you manage, meetings you attend, people you manage, etc., and how they will be handled during your leave. If you need support, your manager can partner with you in developing the best path forward. In the Appendix of this document, you can find templates to help organize your thoughts.





Self-Reflection: It's Good for the *Soul*

HAVING A BABY IS A BIG LIFE TRANSITION - LOTS OF CHANGES, LOTS OF NEW BEGINNINGS, AND LOTS OF DIAPERS!

Life transitions are also great opportunities to do a little soul-searching and reflect on what's most important to you. Below are a few questions to start thinking through as you prepare for your leave:

- What is most important to you in your role as a [professional, expecting parent, partner, leader, team member, etc.] now? Reflect on the identities that are most salient to you right now.
- What personal values can help ground you as you make this upcoming transition?
- When you think about your upcoming leave, how do you envision it?

SELF-REFLECTION NOTES:



AS YOU REFLECT ON THESE QUESTIONS, WE RECOMMEND THAT YOU SET AN INTENTION FOR YOUR LEAVE. AN INTENTION IS SOMETHING THAT CAN HELP ANCHOR YOU AS YOU NAVIGATE LEAVE AND CAN HELP YOU MAINTAIN A HEALTHY PERSPECTIVE.

Need some inspiration? Here are some examples that our clients at Josie created in the past:

- “I will strive to be present for my baby during this time together, while also remembering to care for myself.”
- “I will practice asking for help and being okay with the messy days.”
- “I will use this time to think about my values as a parent.”
- “I will be kind to myself and remember there is no perfect way to parent.”

MY PARENTAL LEAVE INTENTION STATEMENT:



Want a fancy,
easy-on-the-
eyes version
of *your*
intention
statement?

Email hello@myjosie.com and we will send you a digital version of your statement like the one below.



Massella's Parental Leave Intention Statement:

I WILL STRIVE TO BE PRESENT IN THIS
UNIQUE AND PRECIOUS TIME WHILE BEING
ATTUNED TO WHO I AM, MY NEEDS, AND THE
ABILITY TO ADJUST AND CHANGE. I WILL GIVE
MYSELF THE FREEDOM TO FIND MY NEW SELF.

josie*



Let's *Talk* About

#WORKINGPARENTGOALS

A LITTLE PROACTIVE
PLANNING WHEN IT COMES
TO YOUR CAREER CAN GO A
LONG WAY IN HELPING YOU
FIND PEACE OF MIND.
CONSIDER THE FOLLOWING
QUESTIONS – AND
REMEMBER, GOALS SHOULD
BE ACHIEVABLE VS.
ADDING ANY UNNECESSARY
PRESSURE DURING THIS
PHASE OF YOUR LIFE!

WHAT PROFESSIONAL GOALS DO YOU
HAVE PRIOR TO LEAVE? (E.G., MAKE
SURE DIRECT REPORTS ARE SET UP
FOR SUCCESS, WRAPPING-UP A
CLIENT DELIVERABLE)

WHAT GOALS DO YOU HAVE UPON
YOUR RETURN? (E.G., TAKE BACK
OVER XYZ ACCOUNT, CHECK IN
WITH CLIENTS)



DO YOU HAVE ANY SPECIFIC QUESTIONS TO BRING UP TO YOUR MANAGER AND/OR HR WHEN IT COMES TO THINGS LIKE...

- Annual/upcoming reviews
- Goal setting cycles
- Career advancement
- Ongoing projects

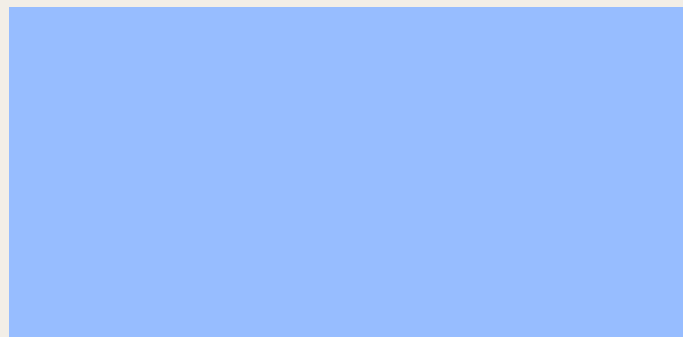
HOW WILL YOUR PROFESSIONAL GOALS AND PRIORITIES BE ADVOCATED FOR WHILE YOU ARE OUT (E.G., A PENDING PROMOTION)?



(good) Relationships & Communication = the Key to Unlocking a Successful Leave

NOW THAT YOU'VE REFLECTED ON YOUR PRIORITIES AND GOALS, LET'S GET TACTICAL. CLEARLY COMMUNICATING EXPECTATIONS AND RESPONSIBILITIES AROUND YOUR LEAVE WITH YOUR MANAGER, TEAM, AND CLIENTS (IF APPLICABLE) WILL GO A LONG WAY TO ENSURE A SMOOTH TRANSITION BEFORE, DURING, AND AFTER LEAVE. CONSIDER THE FOLLOWING QUESTIONS:

WHAT IS THE MOST IMPORTANT THING FOR ME TO COMPLETE PRIOR TO LEAVE?



Josie musings: If you have a growing list of to-do's prior to leave, try mapping them out on a two by two chart, with the Y-axis being urgency and the X-axis being importance. Focus on the top-right activities, then have a conversation with your manager about it.

Phrases to try with your manager:

"It's important to me that I make this transition as successful as possible for our team. Here's where I need to prioritize my time in the coming weeks to do so - what do you think?"

"I'd like to spend the coming weeks focusing on [insert top-right box activities], which will leave the team in a good spot as I transition into leave. For a few other items, I could use your help in determining which are mission critical prior to my leave."



WHAT ARE THE TOP THREE THINGS THAT HAVE TO HAPPEN WHILE I'M ON LEAVE?

A large, solid blue rectangle that occupies the middle section of the page. It appears to be a placeholder for a response to the question above it, or perhaps a visual element intended to represent a list or a set of notes.

Josie musings: It can sometimes be difficult to release control of things while you're away - we get it! Think about what really matters most to you while you're away - what would give you peace of mind? For example, is it that a client account is in good hands? Is it that a direct report's performance review is completed? Whatever it is, narrow it down to just a few items, then proactively think through ways to get ahead of it.



WHAT ARE YOUR COMMUNICATION PREFERENCES DURING LEAVE?

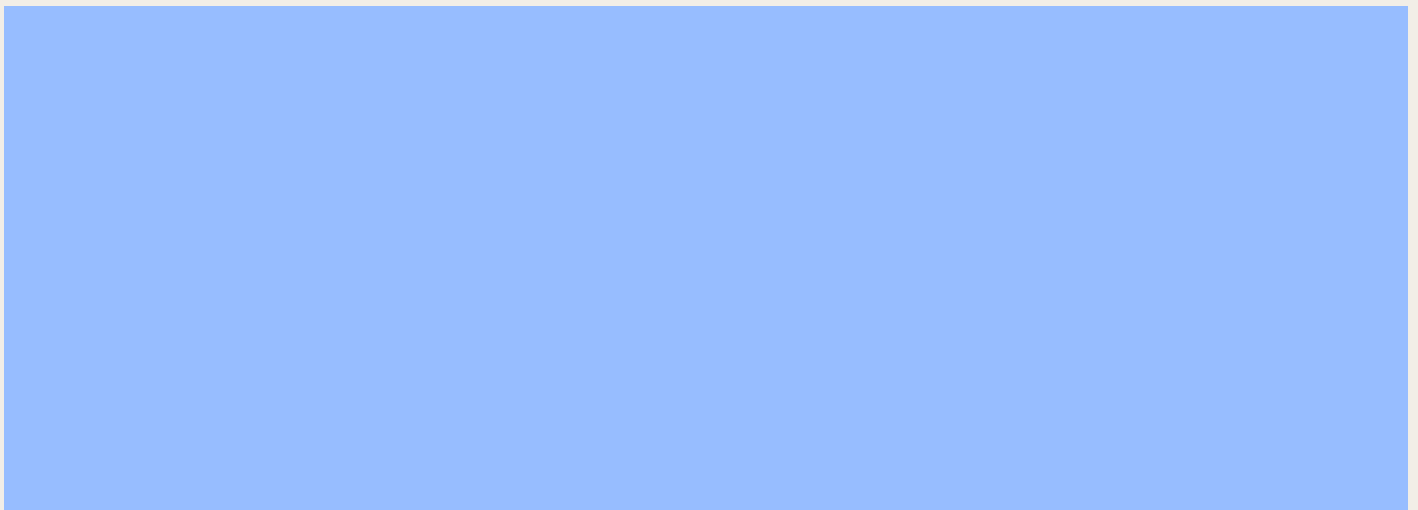
Josie musings: We've seen it all - from parents wanting to completely unplug during their time away, to those wanting to “stay in the know” and keep in regular communication with team members. There is no right way - only the way that will give you the most peace of mind.

Some things to consider:

- What will allow me to be most present with my baby during leave?
- Do I want to completely unplug during my time on leave? What would help me stay accountable to that?
- Would I like to be informed about certain things, e.g., the company holiday party announcement, big client wins, promotions, organizational changes, etc.?
- If yes to the above, who do I want these updates from, and how? (Email, text, phone call, etc.)
- Would a planned check-in with my manager a few weeks before my return help me mentally “ease back”?



WHAT ARE THE EXPECTATIONS FOR MY RETURN TO WORK?



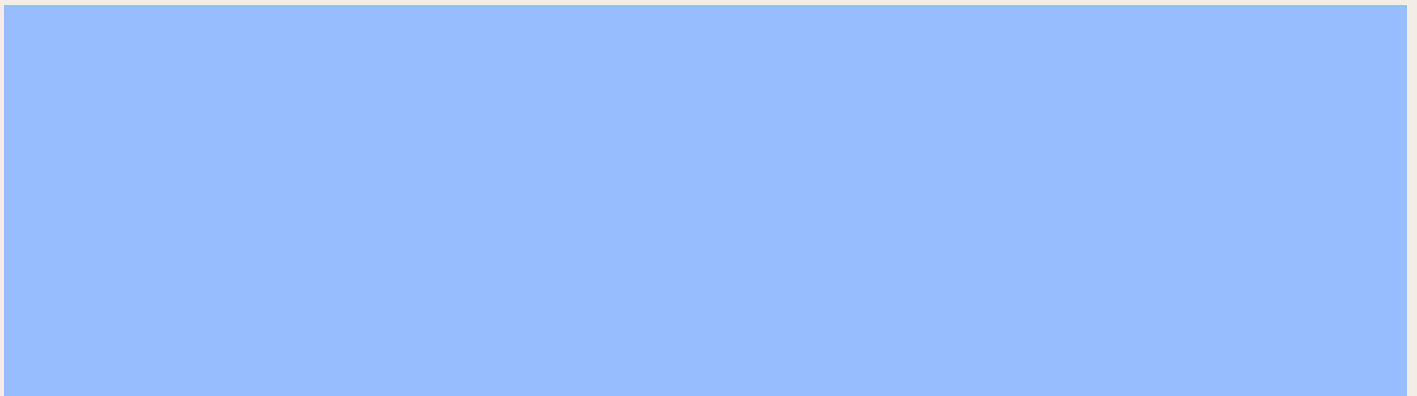
Josie musings: The return to work - really?? Isn't it too soon for this? While that may be in the distant future, it can help to start thinking about what you want that to look like, even now. Of course, if this is too stressful to consider at this point, take a breath and move on - this is meant to be a low pressure exercise!

If you are ready to think about it (even just a little), consider the following:

- Do you want to return full time, right away? What other options are there?
- Are there key accounts, projects, people leader responsibilities, and/or client relationships that you would like to re-assume upon your return?
- If you travel, what are the expectations around getting back on the road following parental leave?



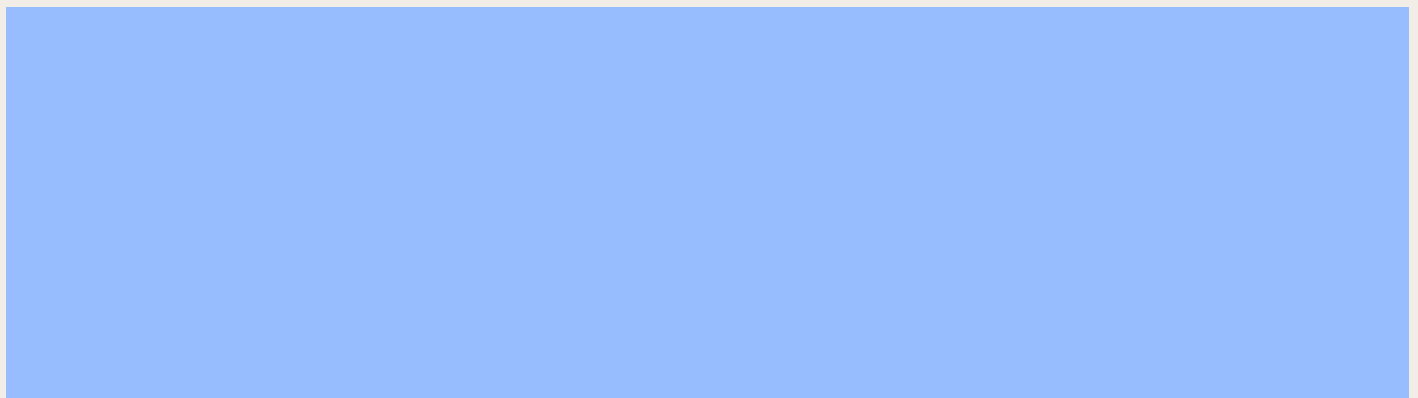
HOW AND WHEN WILL I SHARE MY TRANSITION PLAN WITH MY MANAGER?



Josie musings: We recommend you start talking to your manager about your transition plan as early as you are comfortable doing so. Having this plan in place will allow ample time for necessary conversations to happen, give your manager time to communicate and advocate for your needs, and help team members prepare as well. See the end of this section for a suggested agenda for this meeting.



HOW AND WHEN WILL I SHARE MY TRANSITION PLAN WITH MY COLLEAGUES?



Josie musings: For some items, it may be more appropriate for your manager or others to communicate the transfer of responsibility, while for others you may want to do it yourself. To help differentiate, consider the following:

- Am I comfortable with communicating this myself? Why or why not?
- What are the benefits and drawbacks of the message coming from me vs. another?
- What opportunities are there to strengthen relationships with colleagues through this transition effort?



HOW AND WHEN WILL I SHARE MY TRANSITION PLAN WITH MY CLIENTS/CUSTOMERS?



Josie Musings: This one can be tough, especially if you’ve established good relationships with your clients and feel a strong sense of ownership. Similar to the suggested manager conversation, our general advice here is the sooner the better - it will give your clients ample time to adjust to the idea of you being out for a little while, and think about what questions they might have as you make the transition. It may also make sense to start inviting team members who will be taking over your responsibilities to client meetings so the relationship building can begin prior to leave.

You can also consider what communication you prefer, if any, with your clients while on leave. At Josie, we’ve seen it all - from completely unplugged, to giving clients a way to reach out in urgent situations. We have even seen a few parents check in by phone, send baby photos, and text with clients during leave, as it can actually bring a sense of joy and comfort during leave.

Remember: do what is best for you and your family!



ONCE YOU'VE REFLECTED ON THESE QUESTIONS, WE RECOMMEND THAT YOU SET UP TIME WITH YOUR MANAGER TO WALK THROUGH YOUR GOALS, NEEDS, AND ALIGN ON EXPECTATIONS BEFORE, DURING, AND AFTER YOUR PARENTAL LEAVE.

HERE IS A SUGGESTED AGENDA FOR THAT MEETING:

Suggested timing: ~5 - 6 weeks before your leave date

Duration: 45 minutes

1. Pre-leave priorities (and where you can use some help)
2. Align on expectations during leave (performance reviews if applicable, transition plan, etc.)
3. Communication plan (with clients, direct reports, etc. - and how your manager can support you)
4. Communication preferences during leave (what you want updates on, if anything, and how best to reach you)
 - a. Note: remember - it is okay if you want to disconnect entirely!
5. Align on return expectations (timing, re-assumption of key responsibilities, etc.)



The *Tactical* Things: Tools, Templates, Timing, etc.

IN THE APPENDIX, YOU WILL FIND BLANK TEMPLATES TO HELP YOU GET ORGANIZED FOR YOUR TIME AWAY. THESE CAN BE SHARED WITH YOUR MANAGER AND/OR COLLEAGUES WHO MAY NEED TO BE IN THE KNOW. SOME THINGS YOU'LL WANT TO COMMUNICATE:

- **Logistics** - Due date, planned leave start date, planned return date, return plan / on ramping schedule
- **Communication and Information Flow** - intended accessibility / communication while on leave (frequency and by which mode of communication), emails / topics you wish to be copied on or updated on while away
- **Direct Reports** - if applicable, identify who they will report to while you are out, and communicate with their interim manager the top 3-5 things they should know as they assume this temporary role
- **Recurring Meetings** - meetings you lead or participate in (dates, times, who is in charge while you are away)
- **Current Projects, Accounts, and Responsibilities** - important deadlines, project status, contact information, responsible parties while you are away, contingency plans as needed

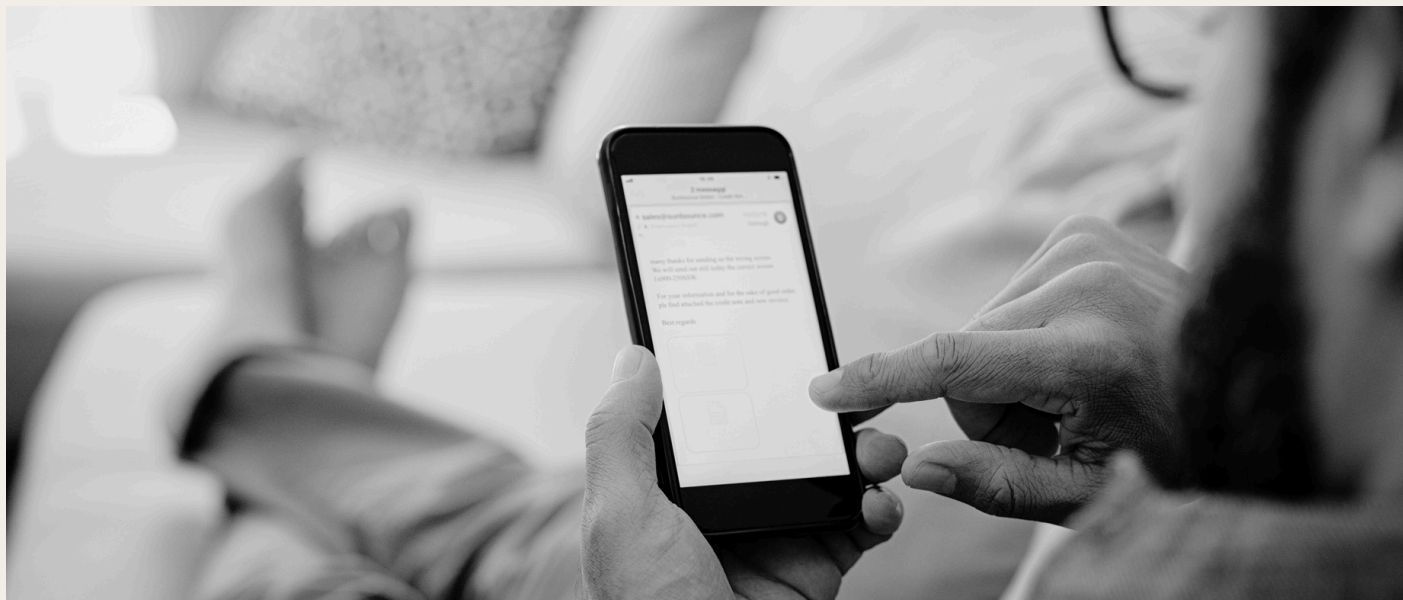


Don't Stop Believin': Making the Journey Into Working *Parenthood*

YOU'RE NEARLY THERE —
JUST A FEW MORE THINGS
TO THINK THROUGH:

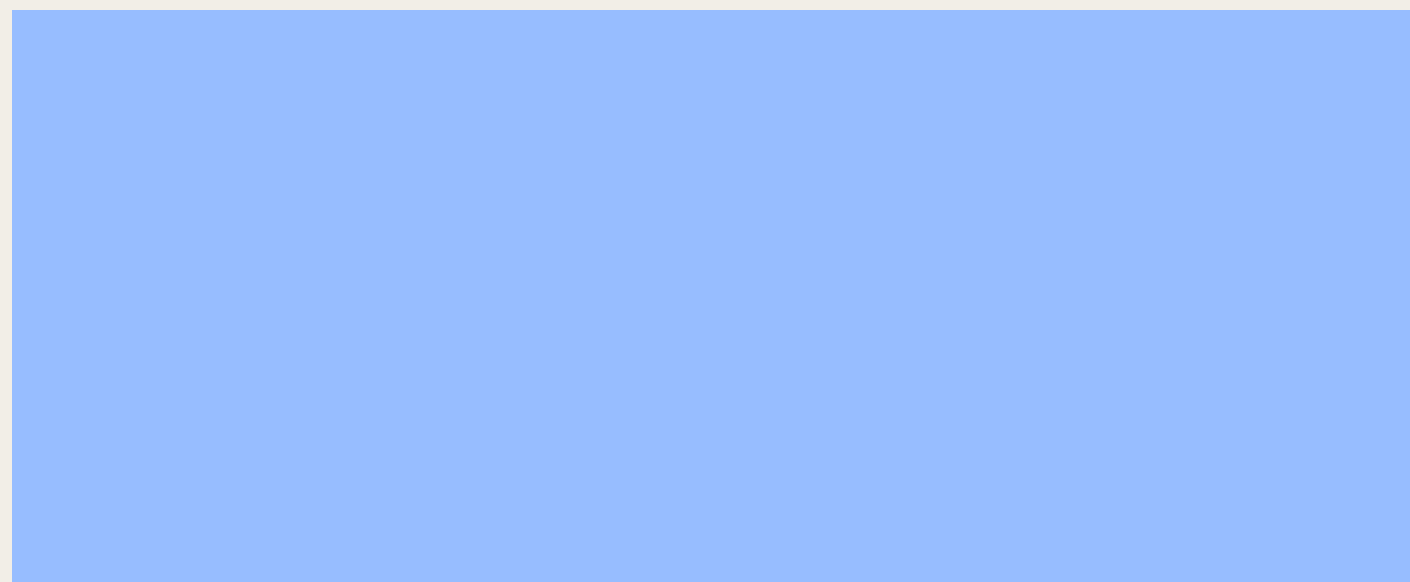
IF YOU HAVE A PARTNER, WILL THEY
BE TAKING TIME OFF? IS THERE
FLEXIBILITY IN WHEN THEY CAN
TAKE TIME OFF? WHAT WILL LEAVE
LOOK LIKE FOR THE BOTH OF YOU?





When preparing for the arrival of a new baby, many busy professionals sometimes forget to proactively plan to care for themselves during this life transition.

WHAT BRINGS YOU CALM AND HELPS YOU RELAX? WHAT HAS WORKED IN THE PAST TO ALLEVIATE STRESS, AND HOW CAN YOU BUILD THIS INTO YOUR LEAVE PLAN?





Appendix

JOSIE'S FAVORITE EMOTIONAL REGULATION TECHNIQUES FOR BUSY PARENTS

🙏 Gratitude List: Write out or mentally list 5 things that you are grateful for and/or bring you joy. As you list them out, take a moment to visualize each briefly and reflect on why you are grateful for that thing and/or why it brings you joy.

¹²₃₄ 5,4,3,2,1: Working backwards from 5, use your senses to list things you notice around you. For example, you might start by listing five things you can hear, then four things you can see, three things you can touch from where you are, two things you can smell, and one thing you can taste. There is no “right” order to do this!

❤ Practice Self-Kindness: Repeat kind, compassionate phrases to yourself. Some examples include: “I’m doing the best I can with what I have in the current moment,” “I am setting a great example to my colleagues, children, and partner by being kind to myself.” Say these phrases, either aloud or in your head, as many times as you need.



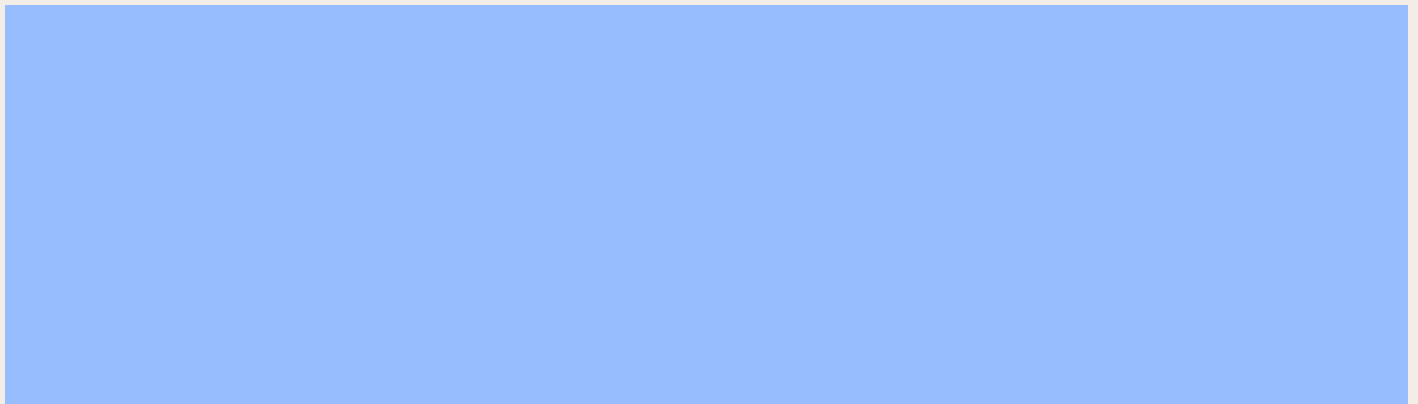
Appendix

PRE-LEAVE PLANNING TEMPLATES

Use these templates to help you stay organized and prepare for parental leave! Duplicate, modify, and share as needed.

LOGISTICS / DETAILS TEMPLATE

- Due Date:
- Planned Leave Start Date:
- Length of Parental Leave:
- Planned Leave Return Date:
- Return Plan:





Appendix

COMMUNICATION AND INFORMATION FLOW TEMPLATE

Please CC my work email on the following issues:

Please reach out to my cell phone or personal email on the following issues:





Appendix

DIRECT REPORTS TEMPLATE

- Name:
- Manager While I am on Leave:
- Frequency of Meetings:
- Notes:

- Name:
- Manager While I am on Leave:
- Frequency of Meetings:
- Notes:



Appendix

RECURRING MEETINGS I ATTEND TEMPLATE

- Meeting:
- Lead:
- When It Meets:
- Who Is Involved:
- Status While I am Gone:
- Notes:

- Meeting:
- Lead:
- When It Meets:
- Who Is Involved:
- Status While I am Gone:
- Notes:



Appendix

CURRENT PROJECTS / TASKS / ACTIVITIES TEMPLATE

- What:
- Lead While I'm On Leave:
- Notes / Coverage Plan:

- What:
- Lead While I'm On Leave:
- Notes / Coverage Plan:



Appendix

GET BY WITH A LITTLE
HELP FROM MY FRIENDS:
JOSIE'S FAVORITE
RESOURCES

WANT MORE RESOURCES?
CHECK OUT JOSIE'S
"I WISH I HAD THIS"
DATABASE TO SEE OUR
CROWDSOURCED LIST OF
THE BEST NEW PARENT
RESOURCES!

Things to Listen To

- For the Data Lovers: Emily Oster's [Parent Data Podcast](#)
- For the Practical Advice Lovers: Dr. Becky's [Good Inside Podcast](#)
- For Navigating Toddlerhood: [Big Little Feelings Podcast](#)
- For the No-Nonsense Lovers: [Big Time Adulting](#)
- For the Balance Seekers: [Work-Life Equation](#) by Paul Sullivan and Bright Horizons
- For the Modern Family: [Stork'd Podcast](#) (try [this episode](#) 😊)
- For the Real Talk Lovers: [We Can Do Hard Things](#) (try [this episode](#) 🧡)

Things to Read

- [The Fifth Trimester](#) by Lauren Smith Brody
- [Good Inside](#) by Dr. Becky Kennedy
- [Cribsheet](#) by Emily Oster
- [Peaceful Parent, Happy Kids](#) by Dr. Laura Markham

Things to Watch

- Karrie Locher's [Bringing Home Baby Course](#)
- [Working Moms](#) (Netflix)
- [Babies](#) (Netflix)

Self Care Favorites

- [Real Self-Care](#) by Pooja Lakshmin
- [Mom-Care Oasis](#) by DeAnna Taylor
- [The Company of Dads](#) by Paul Sullivan

HAVE MORE QUESTIONS?

Get in touch with team Josie:



hello@myjosie.com



[Josie](#)



[@myjosieinc](#)



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