

The Expecting Entrepreneur

Parental Leave Planning Case Studies

See the examples below of how other entrepreneurs have used the parental leave planning template as inspiration for how you can use it in your own business.

Example 1: Marketing Solopreneur Parental Leave Plan

Meet Melinda: her online marketing business is just over a year old. She is a solopreneur who handles the day-to-day client work (mostly retainer-based) as well as all the backend operations, content creation for her own marketing, bookkeeping, etc. For additional context, this is Melinda's second child, so she has a clear sense of what her postpartum needs will be. She has her older child in full-time daycare and her family's financial situation is stable without her income.

Here's what Melinda's parental leave plan looks like, drafted at about 20 weeks pregnant:

Summary

My vision for my leave is that it will be about connection and support. I will take 4 full weeks of parental leave (goal is to be completely hands off during that time and then have 2 months of very part time hours (approximately 10 hours/week), with my baby at home. I really want to have the space to transition to being a family of 4 during those first few weeks, and not be the main point of contact for my clients. My partner has 6 weeks of paid parental leave through their employer, and my mother and mother-in-law will also be providing support, with some clear boundaries about what we actually need their help with. I have an infant daycare slot for when the baby is 3 months old, but will assess how many hours of daycare/work feel right closer to the date. My older child will continue with their full-time daycare. Until the baby is born, my focus in my business is on systematizing and automating some key business activities, specifically my own marketing and client acquisition funnel. I am in the process of hiring a new marketing assistant and will onboard them two months before my leave. They will serve as my current client's main point of contact. I have set blocks of time to my current client work, but any new leads in the pipeline will not begin until after my leave, so I can allocate that time to getting systems in place and hiring.

Standard Operating Procedures

I will dedicate 2 hours of time a week during the rest of my pregnancy to getting my current processes documented, so that I can more easily hand them off to the new assistant. My action items during that dedicated SOP time are:

- Review my time-tracking document and create a master list of the processes needing documentation
- Use Loom to record processes that I want the assistant to handle
- Have assistant review SOPs and do trial run 1 month prior to leave

Hiring & Onboarding

The next month is focused on finalizing the hiring process for my new part-time marketing assistant, so they can be onboarded and start before I go out on leave. My action items are:

- Do test days with top 2 candidates (use new client flow as test)
- Draft offer letter and contract
- Map out onboarding schedule
- Discuss and decide on communication channels and scenarios while I am out on leave

Client Work and Communication

I am going to review and streamline all current essential client work and clearly communicate expectations for my parental leave. My action items are:

- Clean up all client projects in Asana
- Block off client work times from now-leave, accounting for internal business work time
- Draft all five client communication emails
- Send first email, introducing marketing assistant
- Draft FAQs doc for marketing assistant to use during my leave

Content, Marketing & Sales

I am going to dedicate at least one full day a week to setting up my new client acquisition funnel to run on evergreen while I am on leave and more actively marketed when I return. My action items are:

- Block out the time on my calendar
- Reverse engineer the full process, with tasks and deadlines
- Figure out what activities I can deprioritize to get this running (likely routine networking, social media content, and blogging)
- Utilize my accountability group to check on week by week progress
- Have new assistant test it once onboarded

Finances

I will not be taking my usual owners' draw during my leave, and have set up my budget to be able to make sure there is a cushion for bringing on my new assistant and for my return. My action items are:

- Continue to put money away each month to cover the expenses during my leave
- Review financial projections for now-return from my leave with CPA
- Estimate what my draw will be when I return and am working PT
- Sit down with partner and revisit home budget to account for birth/postpartum expenses

Postpartum Support

I know what kind of support will feel most helpful postpartum and have the resources to plan for those. My action items are:

- Generate list of helpful tasks for mom/MIL and share with them
- Ask Delia to organize meal train
- Research night nurse or postpartum doula options

Health/Personal Care

Caring for my body and mind was hard last time, and I want to prepare for that this time around. My action items are:

- Print out Stroller Strides class schedule and purchase 20 class pass
- Print out schedule of new parent support groups (local and online)
- Make note of the Postpartum Support International [Helpline](#) to use as needed

Childcare

My older son will continue with his FT daycare and the baby has an infant slot starting at 3 months. No current action needed.

Return to Work Schedule

My first two months back I will be working part time hours, and need to figure out what will be the best use of that time. My action items are:

- Generate list of what I think will be the highest priority needs; revisit once back in office
- Block of time on the calendar for work, pumping, Stroller Strides class, mental health support
- Once new assistant is onboarded, discuss return-to-work plan

Example 2: E-commerce Founder Parental Leave Plan

Meet Kara: She runs a rapidly expanding, successful e-commerce firm with a team of three (James, Janelle, Marie). She sees preparing for parental leave as an opportunity to train her team of three to run the ship without her, including delegating the client/project management tasks that currently fall to her. She has been planning for business expansion and has healthy reserves from which to pay herself and team members. Kara also has a history of anxiety, which has been intense during pregnancy, and will likely need careful mental health management postpartum.

Here's what Kara's parental leave plan looks like, drafted right at the start of her second trimester:

Summary

I will be taking 16 weeks of parental leave, with the first 10 weeks completely off, and the 6 weeks after that very part time and low touch. I will revisit exactly how many hours I feel ready to go back, and my best guess right now is 10 hours/week, with childcare coverage to ramp up from there. My focus leading up to my leave will be on two primary areas: 1) internally - create the systems, processes and documentation needed for my team to keep things running smoothly without me, and 2) externally - prepare our current clients to have all communication be via the staff. My time off, and the team's increased hours, will come out of the reserves fund I have been building up over the past few months, and I also expect to have two more retainer clients set up before going out on leave. On the personal side, I am going to develop a clear way for the support people in my life to help me during postpartum, and particularly around making sure my mental health is prioritized. I am working with my therapist now to practice some of the coping skills that help me manage my anxiety on a day to day basis, and I want to continue to make the time and space to practice those things after birth.

Standard Operating Procedures

Over the next 6 weeks, I am going through and updating my operations manual to support the handoff of systems and tasks to my team. My action items are:

- Block 2 hours every Wednesday from now until 36 weeks dedicated to SOP workstream
- Ask team members to review and update processes they own by X date (make time to review once they have done so)
- For client-related SOPs, go through and replace my name with James
- Set up digital space in Notion (or other shared system) where final versions of SOPs will live (accessible by all team members)

Delegating

I am expanding my team's capacity to manage day-to-day client management during and after my leave. My action items are:

- Schedule all-team session to review different potential client scenarios that I would normally be point on resolving and discuss/train how they should handle them
- Brainstorm how I want to be contacted by my team during leave if any urgent scenario arises that is unable to be resolved without my attention/input
- Set up bi-weekly high-level update/report protocol from team for 10 weeks fully off
- Review and update job descriptions for team members
 - James to own client management, offload other project management and admin tasks
 - Janelle to take lead on content strategy and related execution
 - Marie to absorb additional admin tasks, in addition to inbox management (hours to increase)
- Schedule work session with James to walk through client details, and discuss what non-client admin can be moved to other team members
- After SOPs are updated, hold 1:1s with each team member to transition new processes they will own. Any questions to be dropped directly into process doc and discussed during regular touchpoints.

Client Work and Communication

I am wrapping up client work currently on my plate and transitioning active client work over to James. Communication with clients about their point person is a key part of this. My action items are:

- Review all current client deliverables that are in progress; update milestones and point person in project management system
- Schedule intro calls with James and all high end retainer clients
- Draft all parental leave client communication emails; have Marie edit and schedule
- At 36 weeks have James send reminder email that he will be their new point of contact
- Review email and create canned responses for frequent FAQs (share with Marie and James)

Content, Marketing & Sales

My team is able to handle most of this without me. Set up review sessions to make sure they have everything they need. My action items are:

- Review/sign off on Janelle's content strategy for next 6 months; focus on sharing about core offer

- Have James sit in on all sales calls in next month; then transition to him leading
- Review sales-related scripts and processes with Marie and James for all inbound requests
- Review CRM for core offer warm leads; block time for all outreach and follow up prior to 30 weeks

Finances

My accountant has been helping me work towards having all financial plans in place for leave. My action items are:

- Appt with accountant; review forecast doc and confirm parental leave budget
- Confirm invoice payment coverage while on leave
- Based on any changes to forecasting doc, circle back to team and update sales goals

Postpartum Support

I have a lot of family support available, but want to make sure it's coordinating and doesn't cause me more stress. My action items are:

- Set up meal train and freezer meals
- Discuss with partner the "hard conversations" that we will each take on with family members and debrief with each other
- Make specific asks of Mom about helpful roles I'd like her to play
- Map out any post-birth visitors onto a calendar that my partner and I both have access to; keep updated to make sure it feels manageable

Health/Personal Care

My mental well-being is my top priority. I know what I am already feeling anxious about (breastfeeding) and am proactively finding support for it. My action items are:

- At next therapy session set up action plan to monitor mental health; increase appts frequency to weekly for remainder of pregnancy and postpartum
- Look up schedule for breastfeeding support group at hospital and mark dates on your calendar (register for class if required!)
- Ask my professional support team (doula, lactation consultant) if any of them will do house calls postpartum
- Sign up for a trial subscription of Headspace or Expectful

Childcare

We will initially be sharing some childcare responsibilities (with support from Mom) and bringing on a paid caregiver for when we return to work full time. My action items are:

- Schedule time with partner to map out each other's post-leave work schedule; add to shared calendar
- Confirm with partner/Mom that between them they will cover childcare during initial return (10 hours/week)
- Discuss when the right time to bring on a nanny/caregiver may be (to begin search as I ramp back up at work and 1 month before husband's leave ends)
- Write outline for caregiver role and block time during leave to revisit it

Return to Work Schedule

I want to have my work calendar accurately reflect when I am "on," particularly during my phased return. My action items are:

- Add calendar header with clear part time hours for return transition
- Schedule weekly "office hours" with team during the 6-week part time back to have a regular touchpoint
- Block recurring pumping times
- Once nanny hired and schedule confirmed, update in office hours

Example 3: Coaching Practice Parental Leave Plan

Meet Lyla: She's been running a profitable coaching practice focused on a handful of specific women's health issues for nearly a decade. It started as a brick and mortar practice, and has slowly begun virtual offerings over the past 3 years. Lyla wants to take at least six months off from any client-facing work when her little one arrives. She is the primary breadwinner, and is worried about the potential impact on her family's income. However, she does have some key staff already in place, who will be able to continue with revenue generating activities in her absence.

Here's what Lyla's parental leave plan looks like, drafted a little past 24 weeks:

Summary

I am going to aim for six months of leave from client facing work, knowing that I may still need to put in 10ish hours per month on key operational activities. For me, this marks a transition from my being the primary service provider plus operator in my business to moving into the operator role for the long term. I have two other service providers and an office manager that have been with my company long-term, and we will be preparing for them to operate semi-autonomously while I am out, while I continue to handle some operational tasks. We have a steady book of clients and productized service offerings that will continue to be our bread and butter. I have cash flow projected to pay myself my partial salary for the first 3 months, and will be checking in with accounting and my partner at that halfway mark to make decisions about the financial status of the other 3 months. My partner will be providing childcare when I return after 6 months, and I'd like to still be on a part time schedule and focused on business growth.

Standard Operating Procedures

We have a robust operations manual that has been periodically updated, and should be refreshed prior to my leave. My action items are:

- As I go through each of my weekly or monthly tasks, review and revise SOP; look for opportunities to streamline or automate certain aspects
- Dedicated team meeting to reviewing any major changes/updates to routine SOPs
- Make short list of the tasks I will continue to own during leave; share at team meeting to brainstorm what else can be delegated

Delegating

Other service providers will be taking on my clients, and the office manager will be taking on some of my tasks. My action items are:

- Review the tasks that the office manager will be covering, together; add any notes as needed.
- Update and execute new contract (increased hours/pay) for office manager

Client Work and Communication

We have a solid book of clients, who continue to come back and refer others. We will draft communication looping them in on the change (celebratory/growth tone) and affirm that their experience will continue to be top notch. My action items are:

- Review office manager's draft of communication; have her schedule once copy is finalized
- Write personal notes for clients who will be transitioning to new service provider

Content, Marketing & Sales

Even though our primary marketing strategy is from work-of-mouth/referrals, our content often brings repeat customers, and I am the primary person responsible for maintaining this element of the business. My action items are:

- Review highest performing past content and see what can be repurposed/expanded on
- Block weekly content batching time (aim for enough to cover monthly newsletter for full leave)
- Work with office manager to finalize sales/promotions content that will go out during leave
- Notify formal referral partners prior to leave on best new point of contact (office manager)

Finances

I have cash flow projected to pay myself my partial salary for the first 3 months, and will be reviewing the books and making decisions at that point. We have enough personal savings to cover the entire 6 months. My action items are:

- Review all business expenses with office manager and see if any recurring expenses can be cut
- Schedule accountant meeting for the 3 month postpartum mark
- Sit down with partner to review household expenses and adjust budget as needed (assuming partial pay for 3 months)

Postpartum Support

My partner is my main source of support, and I know I want to spend more time brainstorming about other resources, particularly about meals and food. My action items are:

- Discuss with my partner what our “non-negotiables” are (for each of us) after the baby is born
- Set up meal train
- Look into local meal delivery/prep options
- Complete postpartum planning workbook to think about what other sources of support I’d like to set up

Health/Personal Care

I have access to some stellar women’s health practitioners through my professional network and own practice, and I want to leverage that support. My action items are to:

- Sign myself up for my practice’s 4 session postpartum integration package
- Continue with my regularly scheduled care between now and birth; schedule additional if needed during last few weeks of pregnancy

Childcare

My partner will be the primary caregiver when I transition back to work. No current action items.

Return to Work Schedule

My return to work feels pretty far away, since I will be taking 6 months off, so I might revisit this at a later date. For now, my action items are:

- Schedule 1:1 sessions with each team member during first week back
- Schedule longer team time (retreat?) for second week back to debrief on my time away and new development
- To do at a later date: update calendar, block out childcare and DND hours, block out pumping time.