



The
Real You
at **Work**

THE EMPLOYER'S ROADMAP

A Step-by-Step Guide for Managers & HR Supporting a Transitioning Employee

Before · During · After

Companion to the Employee Workplace Transition Roadmap

This free resource is provided by the Real You at Work so individuals and employers can explore and understand the complexities of gender and identity transition in the workplace. The Roadmap should be one tool that helps focus decisions and timelines – it certainly should not be considered exhaustive. Many professionals have determined that success in the transition process comes from careful and deliberate consultation with mentors and advocates. Please know the team at Real You at Work is ready to provide the necessary services to ensure success at work.

How to Use This Roadmap

When an employee tells you they're transitioning, your response in that first conversation — and your follow-through in the weeks after — has an outsized effect on how safe, respected, and supported they feel at work. This guide gives you a clear, practical sequence so you're prepared before that conversation happens, not scrambling afterward.

It's written for whoever is closest to the process — HR, a direct manager, or both — and is organized into three phases:

- Part 1 — Before: Foundational policies, training, and systems every employer should have in place, ideally before anyone discloses.
- Part 2 — During: What to do in the disclosure conversation and through the active rollout.
- Part 3 — After: Following up, closing out logistics, and sustaining an inclusive culture long-term.

A note on confidentiality

- Everything an employee shares with you about their transition — including the fact that they're transitioning at all — is confidential unless and until they say otherwise.
- Never share medical details, legal name history, or transition status with anyone who doesn't need it to do their job.
- When in doubt about who "needs to know," ask the employee directly rather than assuming.

PART 1

Before an Employee Discloses

Build the foundation so you're ready no matter when this conversation happens.

1. Get Your Policies in Order

- Confirm your non-discrimination policy explicitly names "gender identity" and "gender expression," not just "sex."
- Review restroom and facilities policy: employees should be able to use the facilities matching their gender identity.
- Review dress code policy for gendered language; revise to role-based or non-gendered standards where possible.
- Create or update a name-change procedure so a chosen name can be reflected in email, directory, and badge systems ahead of any legal name change.
- Confirm your harassment and reporting policy covers gender identity-based harassment and misconduct explicitly.

Policies matter most when they're tested — write them assuming a real employee will rely on them, not as a compliance formality.

2. Audit Your Benefits

- Review your health insurance plan(s) for transition-related care coverage (hormone therapy, surgery, mental health, voice therapy, hair removal).
- Check for and remove any explicit transgender exclusions in plan documents.
- Confirm your Employee Assistance Program (EAP) includes counselors experienced with gender-affirming care, or can refer out to them.
- Clarify how medical leave policies apply to gender-affirming procedures, and communicate this clearly in your handbook.

3. Prepare Your Systems

- Confirm HR/IT systems support a chosen name that's separate from an employee's legal name (email, directory, badge, Slack/Teams, scheduling tools).
- Identify every system where a name appears — payroll, benefits, badge/security, org chart, ticketing systems, legacy records — so updates can move quickly once requested.
- Assign clear ownership: who in HR/IT is responsible for processing a name and pronoun update end-to-end?
- Set a target turnaround time for system updates once an employee requests them (e.g., within 5 business days).

4. Train Your People

- Provide baseline training for all managers on gender identity, pronoun use, and confidentiality expectations.
- Train HR and frontline managers specifically on how to respond in the moment an employee discloses.

- Make sure your leadership team is prepared to model correct name/pronoun use publicly.
- Consider broader, optional training for the full team on working respectfully with trans and non-binary colleagues.

5. Know Your Legal Obligations

- Confirm which federal, state/provincial, and local protections apply to your workforce — these vary significantly by location.
- Loop in employment counsel to review your policies against current law at least annually.
- Understand your obligations around restroom access, dress code, and name/pronoun use if a formal complaint is ever filed.

Laws in this area shift more often than most HR policy — put a recurring reminder on the calendar to revisit this section.

6. Identify Your Support Resources

- Identify whether your company has or could sponsor an LGBTQ+ Employee Resource Group (ERG).
- Build a short internal resource list (EAP, ERG, external advocacy orgs) that HR can hand to an employee immediately upon disclosure.
- Know your escalation path if a situation requires legal or executive involvement.

PART 2

When an Employee Tells You

How you show up in this conversation, and the weeks that follow, sets the tone for everything else.

1. The Disclosure Conversation

- Thank the employee for trusting you — this is a significant, deliberate disclosure, not a casual update.
- Ask directly: What name and pronouns should you use, starting when?
- Ask what they want kept confidential, and from whom, until they say otherwise.
- Ask what support they need from you specifically — don't assume you know.
- Avoid asking about medical details, surgery plans, or "before" details — none of this is required information.
- Agree on next steps and a rough timeline before the meeting ends.

Sample responses for the disclosure conversation

- "Thank you for telling me — I want to make sure I get this right for you."
- "What name and pronouns should I be using, and starting when?"
- "What would you like me to keep private for now, and who is it okay to loop in?"
- "What can I do to make this easier for you day to day?"

2. Immediate Next Steps

- Submit the chosen name/pronoun update to HR/IT the same day, using the process from Part 1.
- Confirm with the employee before informing anyone else — never announce on their behalf without explicit agreement on timing and wording.
- Document the agreed name, pronouns, and confidentiality boundaries in a secure, limited-access record.
- Schedule a follow-up check-in within the first week to confirm systems are updating correctly.

3. Planning the Team Announcement

- Ask the employee whether they want to announce it themselves, have you announce it, or skip a formal announcement entirely.
- Draft the announcement together if you're sending it — keep it short, factual, and forward-looking (name and pronouns going forward, nothing about the past).
- Agree on timing — consider what else is happening on the team that week and avoid awkward overlaps.
- Prepare a short, calm line for colleagues who have questions: redirect to respect and privacy rather than explanation.

4. Updating Systems & Facilities

- Confirm email, directory, Slack/Teams, and scheduling tools reflect the new name within your committed turnaround time.
- Issue an updated ID badge and update building/security access.
- Confirm restroom and facilities access is settled and communicated to anyone who needs to know (e.g., building security).
- Update business cards, letterhead, and any external-facing materials if applicable.
- Confirm payroll and benefits systems are updated once legal documentation, if any, is submitted.

5. Supporting the Team Through Change

- Address questions or discomfort from other team members directly and promptly — don't let it linger unaddressed.
- Reinforce, visibly and consistently, that correct name and pronoun use is a baseline expectation, not optional courtesy.
- Correct misgendering or deadnaming when you hear it, calmly and without making it a bigger moment than necessary.
- Watch for subtler forms of exclusion — being left off invites, jokes at the employee's expense, sudden distance from colleagues.

PART 3

After the Transition

Following through and building a workplace this employee — and the next one — can trust.

1. Follow-Up Check-Ins

- Check in at 30 days: Are systems fully updated? Is anything still causing friction?
- Check in at 90 days: How is the employee doing on the team? Any lingering issues to resolve?
- Ask directly whether their workload, visibility, or opportunities have shifted in any way — and address it immediately if so.
- Keep the door open for future check-ins rather than treating this as a one-time event.

2. Closing Out Loose Ends

- Confirm every remaining system reflects the correct name (retirement accounts, expense software, legacy tickets, archived records).
- Address historical records thoughtfully — some legacy documents may not be fully changeable, but flag and update what can be.
- Confirm any legal name change documentation received has been filed and reflected everywhere required.

3. Handling Issues That Arise

- Take any report of harassment or discrimination seriously and act on it promptly, per your policy.
- Keep a record of any incidents and their resolution, separate from performance files.
- Involve legal counsel early if a situation escalates beyond informal resolution.
- Debrief with the employee after resolving an issue to confirm they feel it was handled well.

4. Sustaining an Inclusive Culture

- Ask the employee (only if they're willing) what worked well and what could be improved in your process — and actually apply the feedback.
- Revisit your policies, training, and systems periodically so the next employee who transitions has an even smoother experience.
- Support ERG involvement or mentorship opportunities if the employee wants to be a visible resource — never require or expect it.
- Keep leadership visibly engaged in LGBTQ+ inclusion year-round, not only when a transition is actively underway.

The goal isn't a single successful transition — it's a workplace where this process gets easier, and less remarkable, every time.

A Final Note

Supporting an employee through a workplace transition isn't a single announcement or a policy update — it's an ongoing practice of getting the small things right, consistently, long after the initial news has settled in.

Done well, this isn't just about one employee. It's a visible signal to your entire team about what kind of workplace you are — and that shapes who chooses to stay, and who chooses to trust you with the truth about who they are.