



The
Real You
at Work

THE WORKPLACE TRANSITION ROADMAP

A Step-by-Step Checklist for Trans & Non-Binary Employees

Before • During • After

This free resource is provided by the Real You at Work so individuals 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 you thrive at work.

How to Use This Roadmap

Every transition is different, and there is no single "right" way to come out at work. This roadmap is a comprehensive menu of considerations, not a mandatory sequence — use the parts that apply to your situation, skip what doesn't, and go at your own pace.

The checklist is organized into three phases:

- ☐ Part 1 — Before: Planning, research, and preparation you can do on your own timeline.
- ☐ Part 2 — During: The active rollout — telling people, updating systems, and navigating day-to-day changes.
- ☐ Part 3 — After: Sustaining the change, following up on loose ends, and thriving long-term.

A note on safety first

- Your safety — physical, emotional, and financial — always comes before any item on this list.
- If your workplace or region does not have strong legal protections, move through Part 1 slowly and lean on the legal-review items before disclosing anything.
- It is always okay to pause, delay, or change your plan at any point.

PART 1

Before You Come Out at Work

Lay the groundwork so your transition unfolds on your terms.

1. Ground Yourself First

- ☐ Clarify your own goals: What does a successful transition at work look like for you?
- ☐ Decide what you're comfortable sharing publicly vs. keeping private (medical details are never required).
- ☐ Identify 1–2 trusted people outside of work (friend, therapist, partner, support group) to process big feelings with.
- ☐ If accessible, connect with a therapist or counselor experienced in gender-affirming care.
- ☐ Find a trans/non-binary support community — locally or online — for peer perspective.

You don't owe anyone a fully-formed plan before you start. Give yourself permission to figure it out as you go.

2. Know Your Rights

- ☐ Research the legal protections that apply to you (federal, state/provincial, and local laws vary widely).
- ☐ Read your employer's official non-discrimination and equal employment policy — check specifically whether "gender identity" and "gender expression" are named.
- ☐ Look for an Employee Handbook section on dress code, restroom use, and name/pronoun policy.
- ☐ Check if your company has an Employee Resource Group (ERG) for LGBTQ+ staff.
- ☐ Note the name and contact of an employment attorney or legal aid organization in your area, just in case you need it later.

Laws differ significantly by country, state, and even city — what's true for one worker may not apply to another. When in doubt, verify with a local legal resource rather than assuming.

3. Understand Your Benefits

- ☐ Review your health insurance plan for transition-related care coverage (hormone therapy, surgery, mental health, voice therapy, hair removal).
- ☐ Check whether your plan has an explicit transgender exclusion — and if so, whether it can be appealed or is being phased out.
- ☐ Ask HR (confidentially, if possible) whether an Employee Assistance Program (EAP) offers gender-affirming counseling.
- ☐ Understand your medical/short-term leave policy if you're planning any procedures.
- ☐ Check how FMLA or equivalent leave protections apply to gender-affirming care in your situation.

4. Plan Your Timeline

- ☐ Choose a rough target window for when you'd like to be out at work (flexible is fine).
- ☐ Decide whether you want a single "announcement day" or a gradual, individual rollout.
- ☐ Map any medical milestones (start of HRT, surgery dates) against major work events (performance reviews, product launches, busy season) and plan around conflicts where possible.
- ☐ Decide on your new name and pronouns, and how firmly they are set before you disclose.

5. Prepare Documentation Changes

- ☐ Research the legal name/gender-marker change process in your jurisdiction (court order, ID, passport, Social Security or national equivalent).
- ☐ List every place your current legal name appears at work: payroll, benefits enrollment, email, ID badge, org chart, business cards, email signature, meeting software, building security.
- ☐ Ask HR what can be updated with a preferred/chosen name immediately vs. what requires a legal name change first.
- ☐ Gather documents you'll need to submit (updated ID, court order, etc.) once your legal name changes.

6. Choose Your First Work Conversation

- ☐ Decide who you'll tell first — usually HR, your direct manager, or both.
- ☐ Request a private meeting rather than raising it informally in passing.
- ☐ Prepare 3–4 key talking points: your name, pronouns, timeline, and what support you need from them.
- ☐ Decide in advance who is allowed to share the news further, and who is not, until you say so.
- ☐ Consider bringing a written summary or letter to the meeting so nothing gets lost verbally.

Sample talking points for your first conversation

- "I'm transitioning, and I wanted you to hear it directly from me first."
- "Starting on [date], I'll be going by [name] and using [pronouns]."
- "Here's what I need from you: updated records, help informing the team, and privacy until I'm ready to share more."
- "I'd like to check in with you regularly as this rolls out."

7. Plan the Practical Logistics

- ☐ Decide which restroom/facilities you plan to use and confirm your right to use them under company policy.
- ☐ Think through any dress code questions and whether the policy is gendered.
- ☐ List all systems needing updates: email address, email display name, Slack/Teams, ID badge, security system, directory listing, business cards, voicemail.

- ☐ Draft your new email signature.
- ☐ Decide if/how you want your photo (badge, directory, intranet) updated.

8. Draft Your Communication Plan

- ☐ Decide whether you or HR/your manager will send the announcement to your team.
- ☐ Draft (or ask HR to draft) the announcement — keep it short, factual, and focused on name/pronouns going forward.
- ☐ Decide the timing: before, during, or after any time off you might take.
- ☐ Identify a few allies or close colleagues to inform slightly ahead of the wider announcement, if that would help you feel supported.
- ☐ Prepare a short, calm response for well-meaning but awkward questions ("I'm not going to get into medical details, but I appreciate you asking how you can support me").

PART 2

During Your Transition at Work

Executing the plan — one step at a time.

1. The Official Announcement

- ☐ Confirm final wording and timing with HR/manager before it goes out.
- ☐ Send or authorize the announcement (email, team meeting, or both).
- ☐ Update your own email signature, Slack/Teams display name and profile photo the same day, if possible.
- ☐ Let close colleagues/allies know the announcement is going out so they can help reinforce it.

2. Systems & Records Update

- ☐ Submit your chosen name change request to HR/IT for email and internal systems.
- ☐ Confirm your new name displays correctly in the employee directory, org chart, and scheduling tools.
- ☐ Request an updated ID badge and building/security access.
- ☐ Update business cards, letterhead, and any external-facing materials (LinkedIn, bios, website).
- ☐ Confirm payroll and benefits systems are updated once your legal documentation is ready.
- ☐ Ask IT to update any old email aliases so messages still reach you during the transition period.

3. Facilities & Daily Logistics

- ☐ Confirm your restroom/facilities access is settled and communicated to relevant staff (e.g., building security, office manager).
- ☐ Flag any dress code questions to HR in writing so there's a clear record of what was agreed.
- ☐ Identify a go-to person (HR, manager, or ally) for immediate support if something goes wrong that day.

4. Navigating Day-to-Day Interactions

- ☐ Decide in advance how you want to handle accidental misgendering or deadnaming (correct in the moment, follow up privately, or let a manager handle repeat issues).
- ☐ Give yourself permission to correct people matter-of-factly, without over-explaining or apologizing.
- ☐ Keep a private, dated log of any harassment, repeated intentional misgendering, or discrimination — include what happened, who was involved, and any witnesses.
- ☐ Identify the internal reporting process (HR, ethics line, ERG lead) in case you need to use it.

- ☐ Check in with your manager on a set cadence (e.g., weekly for the first month) about how things are going.

5. Protecting Your Wellbeing

- ☐ Watch your workload — ask for temporary flexibility if the emotional labor of transitioning is heavy some weeks.
- ☐ Keep your outside support system (therapist, friends, community) in the loop, especially in the first few weeks.
- ☐ Take any medical leave you're entitled to without guilt.
- ☐ Notice signs of burnout or isolation early, and use your EAP or support network before things escalate.

PART 3

After Your Transition

Sustaining the change and continuing to thrive.

1. Follow-Up Check-Ins

- ☐ Schedule a 30-day check-in with HR/manager: What's working? What still needs fixing?
- ☐ Schedule a 90-day check-in to revisit any open items from Part 2.
- ☐ Ask directly whether any performance reviews, projects, or opportunities have been affected — and address any concerns immediately.

2. Closing Out Loose Ends

- ☐ Confirm every remaining system reflects your correct name and pronouns (retirement accounts, expense software, old ticketing systems, archived documents).
- ☐ Update your professional profiles (LinkedIn, alumni networks, professional associations, conference bios).
- ☐ Check that historical records (old performance reviews, past emails, certificates) are updated or annotated where possible, understanding some legacy records may not be fully changeable.
- ☐ Revisit your legal document checklist from Part 1 and confirm everything has been filed.

3. Long-Term Culture & Career

- ☐ Reassess your career goals — make sure your transition isn't (even unconsciously) sidelining you from opportunities, and raise it directly with your manager if you notice a shift.
- ☐ Consider whether you want to be visible as a resource for other trans/non-binary colleagues, mentees, or your ERG — entirely your choice, never an obligation.
- ☐ Give feedback to HR on what worked and what should be improved in their process for the next employee who transitions.
- ☐ Revisit your restroom, dress code, and documentation experience periodically to make sure nothing has quietly reverted.

4. Ongoing Self-Care

- ☐ Keep your outside support system active — transitioning at work is a milestone, not a finish line for how you feel.
- ☐ Celebrate the moment. You did something brave and deliberate — acknowledge that.
- ☐ Revisit your private incident log periodically; if a pattern emerges, that's useful evidence if you ever need to escalate.

5. If You Need to Escalate

- ☐ Bring your dated incident log to HR or your ethics line if informal resolution hasn't worked.

- Contact an employment attorney or a legal aid organization specializing in LGBTQ+ workplace rights for a consultation.
- Reach out to national or local advocacy organizations for guidance and, in some cases, direct support.

Documentation is your best friend if a situation ever needs formal escalation — dates, quotes, and witnesses matter.

A Final Note

There is no perfect transition and no perfect timeline. Some weeks will feel easy, others will feel like a lot. This roadmap exists so that fewer things catch you by surprise — not so that you check every box in order.

You deserve a workplace where you can do your job as yourself. Go at your own pace, lean on your support system, and know that this resource will be here if you need to come back to it.