



# **The Ultimate Guide to PTO**



# Introduction

We live in an incredibly exciting time. The rate of innovation continues to increase, people are finding new ways to live and work, and the world (and tech industry in particular) is excited about and open to new ideas that have the potential to have a big impact.

With all this excitement and innovation however, comes anxiety, stress, and the looming threat of burnout. We've all heard the phrase "do more with less"—well, now we're living in a time where we can do MORE than we ever have before, with LESS than we ever have before. And while this has made us more efficient, it's also made us feel like we're never doing enough. We feel like we could always be doing more than we are, which causes stress and anxiety. We get anxious if we don't spend the extra time or go the extra mile because we think someone else will, or we do spend the extra time or go the extra mile and then we burn out.

For many years, many of us in tech (and broadly across the workforce) were so consumed by work and technology that we felt the impacts on our physical and mental health. This brought us to where we are today. There is industry-wide recognition that stress, anxiety, and burnout are serious problems that need to be solved. A study of nearly 4,000 people in February 2020 found that 61% of tech professionals were burned out.<sup>1</sup>

What that has led to is each of us developing our own systems and habits to make sure we aren't overdoing it. We leave our phones outside our bedrooms, we delete social media apps, and we block off specific times

<sup>1</sup><https://usblog.teamblind.com/wp-content/uploads/2020/03/TheStateof-Burnout2020.pdf>

in our calendars to spend time with our kids or walk our dogs. Increasingly, companies have become supportive of these efforts, and in many cases, this support has been accelerated by the COVID-19 pandemic.

Many companies have now begun to give their teams mental health days off, access to additional healthcare resources, and the ability to work remotely. There are other even more radical strategies being tested and implemented now as well, like 4-day work-weeks and full company week-long shutdowns.

PTO (paid time off) is an absolute necessity if employees are to work sustainably, and while many companies are giving unlimited PTO, mental health days, and even encouraging employees to take time off, the majority of employees are not doing so.

Before COVID-19, research showed that the average employee who had unlimited PTO took 13 days off each year, and that even among employees without unlimited PTO, less than half used all their paid days off. Then COVID-19 hit, and no one was able to take vacations, so the amount of PTO taken plummeted even further. In fact, [33% of paid vacation time](#) across the entire country went unused in 2020.

This unchecked overwork can lead to mental distress, relationship troubles, and health issues. And while some may dismiss this as personal problems unrelated to getting the job done, these issues can easily translate to poor quality work and low employee morale and motivation.

This pandemic has changed the way we think about health, work, and life in general, and as we begin to emerge out of the other side, we have a unique opportunity to take what we've learned about ourselves and each other over the last couple of years and change the way we work for the better. The purpose of this guide is to support this goal by providing insights, strategies, templates, and tactics regarding PTO that will benefit both employees and companies for years to come.

## A Note For Leaders

If you yourself have not taken at least one week of PTO in the last six months, you are doing a disservice to yourself and to your team. If you do not take PTO, your team will not feel comfortable taking PTO. They look to you to steer the culture and lead by example, so it doesn't matter how much you encourage them to take it, your actions will speak the loudest. Many leaders will take vacation time and mental health days even when they don't feel it's personally necessary, just so that their team members will feel comfortable doing the same.

Just take the example of prominent CEOs Richard Branson (Virgin Group) and John Donahoe (eBay), who make it a point to take at least [two weeks' vacation](#) every year.

## A Note For Individual Contributors

It can be difficult taking PTO and/or mental health days when those around you are not doing so, but you need to prioritize your own health above all else. If you aren't happy and healthy, you're going to be a worse employee, a worse friend, and a worse family member. If you use your PTO and you receive negative feedback from a manager or you take a mental health day and are judged for doing so, it may be time to look for a new company with a culture that truly cares. Every company culture is different and no company is perfect, but if there ever was a line to draw in the sand, caring about mental and physical health is it.



## The Science of Vacation

The reason we all take vacations and PTO is to rest and recuperate. For some people, that means lying on a beach in the tropics. For others, it means hiking a mountain, or even staying home and chilling with Netflix. Whatever your preferences are, it's critical that you understand some of the science behind R&R so that you can take full advantage of your PTO and maximize the benefits.

It starts when you book your vacation. We've all felt it. You complete your booking and you get a fantastic hit of dopamine, one of the main happiness hormones. A 2014 study by Cornell University found that the anticipation of an experience (like a trip) can substantially increase a person's happiness levels.<sup>2</sup> The anticipation and excitement you then feel in the days and weeks leading up to your vacation also give you periodic bumps of happiness hormones that brighten your mood, decrease your stress levels, and lower your blood pressure.

The lesson? Book your vacation several weeks in advance. If you book last minute, you're selling your brain short of all those happiness hormones. If you book a year in advance, it may be too far away to reap the benefits.

Then, you get to the next stage, which is actually going on vacation. When on vacation, there are several things that contribute to your level of rest and recovery. The most rest occurs when you have a mix of "relaxed wakefulness" – that state of meditative bliss that generally requires being unplugged – and "play," which occurs when the brain is engaged in some fun, new activity.<sup>3</sup>

<sup>2</sup> <https://journals.sagepub.com/doi/abs/10.1177/0956797614546556>

<sup>3</sup> <https://globalnews.ca/news/3657382/brain-holiday-vacation-unplugging/>

Finally, vacations are excellent opportunities to sleep well, eat well, and drink lots of water—something almost all of us let slide when we're at home. When you don't set your alarm and you don't have set times to eat during the day, your body recalibrates itself. You can fall asleep when you're tired and wake up whenever you wake up. You can eat whenever you're hungry, drink whenever you're thirsty, and again this has a massively positive effect on your brain, not only while you're on vacation, but when you return home as well.

When you return home, the recalibration you experienced makes it easier to form new habits and implement changes to your day-to-day life. Additionally, in a recent study from South Korea, researchers interviewed 225 tourists who traveled overseas and found that, on average, life satisfaction rose 15 days before travel and lasted for about one month after returning home. This means that not only does planning a trip make you happy, but the emotional benefits of travel stay with you long after you've returned home.<sup>4</sup>

<sup>4</sup> <https://www.forbes.com/sites/suzannerowankelleher/2019/07/28/this-is-your-brain-on-travel/>



# How To Take PTO

It's all well and good to discuss why vacations are so important and what is happening in your brain before, during, and after vacations, but all of this information is moot without the ability to take action.

## Asking for PTO

When requesting PTO date approval, you want to do two things:

1. Be assertive about taking your PTO. It's not a question of "if" but "when."
2. Be a responsible team player. Do your best to reasonably accommodate the needs of the team and company.

## Be Assertive

Don't ask for PTO. PTO is in your contract and your employer is legally obligated to honor it. That doesn't mean you should simply declare your PTO either. The best option is to frame your request for PTO in such a way that gives you your desired outcome regardless of what your manager says.

That might mean instead of asking "Can I go on PTO from August 1-12?" ask something like "Would you prefer if I take my PTO August 1-12 or August 12-20?"

That way you don't come across as inflexible or inconsiderate, but you also aren't giving them the option of saying "no you can't take PTO."

## Be A Responsible Team Player

You are part of a team, which means you should do your best to have your PTO cause as little disruption as possible for your teammates, customers, and company.

That means giving as much notice as possible, being as flexible with your dates as you can, and taking the needs of others into consideration.

If you want to take full advantage of your PTO (especially if it's unlimited) you should strive to make taking time off as easy for your teammates and manager as possible and not a point of contention.

## Preparing For PTO

When it comes to preparing for your PTO, it's important to take everyone's needs into account.

If you're in a customer-facing role, customers need to know when you'll be leaving, when you'll be back, and who to contact while you're away. They should also have as much notice as possible, so we recommend emailing them to let them know as soon as your PTO dates are official. One strategy that works well is to temporarily add it to your email signature that you will be away between X and Y dates.

Your colleagues need to know when you will be away as well. A great strategy for this is to update your Slack status to [Going on PTO between X and Y dates] at least two weeks in advance of your vacation. You should also add it to your calendar and regularly bring it up during meetings leading up to your time off to make sure everyone remembers you'll be away.

In preparation for your PTO, you should also take stock of everything that is currently on your plate and determine what your goals are for before you leave and for when you return.

What do you want your workload to look like when you leave? What projects or tasks do you want to be done?

What do you want your workload to look like when you return? What projects or tasks do you expect to come back to?

Most importantly, how can you prepare so that when you come back to work, you don't get a huge spike of stress because of the work that is waiting for you? A great strategy here is to block off significant time on your calendar during your first two days back so that you can parse through everything you missed before jumping back into the regular fray. You should prepare your return from PTO as carefully as you plan your departure and your vacation itself.

## Avoiding Work During PTO

When you're used to working hard, it's difficult to suddenly drop everything you're doing. If you have a device handy you may be hit with a sudden urge to check your email and hop onto Slack for a quick second. As difficult as it is, you cannot let yourself fall into that trap. It takes a couple of days for your brain to fully reach "vacation mode" and even 30 seconds of checking your email or Slack can knock it out of this state and force you to start over.

The best option is to remove temptation entirely by leaving your devices at home or in your hotel room. If you cannot physically check your devices, then you're more likely to stay in vacation mode.

The second best option is to delete apps off your device, sign out of your work accounts, and create a guest user on your laptop called "Vacation" that looks and feels entirely different from your normal user account.

## Coming Back From PTO

If you scheduled time on your calendar to catch up when you return, then it should be relatively easy to slide back into things without a lot of stress. Take stock of what occurred when you were gone, write out and prioritize anything new that was added to your plate, and start crossing things off.

It's important when you come back to talk about your vacation as well, whether you're a manager or an individual contributor, as it helps to foster a culture that truly values vacation time and self-care. Post pictures and videos in Slack, share highlights or funny moments from your trip, and talk about how the trip made you feel.

If you simply come back and act as if you never left, you won't be helping anyone else. If you come back though and you talk about everything, you'll get other people on the team thinking about their next vacation while providing the validation that it is perfectly safe (and hopefully even encouraged) to take vacation at your company.

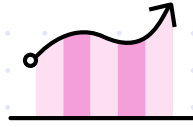
## How To Give Customer-Facing Teams PTO

Taking a vacation can be very easy for some teams while being very difficult for others. As many companies have learned, it's easy to declare a mental health day off, but your customers will still need support. Clearly it's not fair to give everyone at a company PTO except for the support team, so what do you do?

One option is to simply stagger customer-facing team days off so that the entire team is not off at the same time. While effective, there's a big difference between having a day or a week off while the rest of the company is working, and having a day or a week off as an entire company. In the latter situation, there's likely going to be way less work to come back to, since everything was shut down for the full day.

Another option is to set expectations with your customers that there won't be customer support on a given day. If you give them plenty of notice, they will be fine. Of course there are certain exceptions, perhaps if you work in healthcare, where lives literally depend on your company, in which case this is not a good option. In most cases however, this is a perfectly reasonable option to pursue.

A third option that seems to be effective is to split up the company shutdown into two separate days. Half the company takes day one off, and the other half takes day two. That way there's no disruption for customers, but the customer-facing teams don't feel like they're the black sheep who are the only ones missing out on the company day off.



## 10 Strategies To Make The Most Of Your PTO

1. Take it. If you have unlimited PTO, it means that if you leave your job or are let go, your company owes you no money for accrued vacation time, which they would otherwise be obligated to pay. Take as much PTO as you can, without it impacting your job performance in any way. As long as you are performing at or above expectations at work, there's no reason you can't take 2-4 weeks (or more) of PTO in a year.
2. Go somewhere new every time. Your brain needs to hear, see, and smell new things. If you're on a budget, find somewhere within driving distance that you've never been to. If you're not on a budget, go somewhere new for every vacation. The stimulation will make your trip feel longer and will ultimately make you feel more relaxed and refreshed when you return.
3. Don't just lie on the beach the whole time. Your brain needs rest but it also needs play. Whether you go on a hike, go to a museum, or go salsa dancing, giving your brain this type of stimulation will do wonders.
4. Leave all distractions at home (within reason). Take the time to figure out what potential distractions you might encounter and how you are going to avoid them. Have Slack on your phone? Delete it for your trip. Have a laptop you want to bring for movies? Make a "vacation" user account. Have kids? Leave them behind. Just kidding—only leave them behind if you are in need of an adults-only trip and have someone responsible to look after them.

5. Be strategic about your vacation. As with almost everything in life, the best approach is to create a plan that allows for a degree of adaptability and spontaneity. You don't have to decide ahead of time where you're going to eat every single day for every single meal, but having a list of restaurants you know you'll want to eat at at some point during your trip is a great way to a) build more excitement/anticipation ahead of time, and b) ensure that you don't end up scrambling to find somewhere to eat and being disappointed or arguing with your travel companion.
6. Take photos and videos! Not obsessively, and not for social media, but for yourself. The vacations you take now should become fond memories for the future, and having photos and videos to reflect on are extremely important. Take a second now to find a photo or video from the last vacation you enjoyed—we guarantee you'll get a hit of dopamine from looking at it because of the memory it triggers.
7. Have a new landmark experience. This could mean bungee jumping, eating a fish you've never heard of, seeing a famous painting...anything that you'll be able to reflect on as a memorable moment. Ride a gondola or view the Mona Lisa. These moments will come to define your trip and serve as landmarks in your memory, helping to separate every trip as a unique experience.
8. The hotel matters. The bed you sleep on matters. The cleanliness of your surroundings matters. They are all significant elements of your trip. In the worst case scenario, they should be simply forgettable. In the best case scenario, you should come back from your trip asking "Did you take a photo of the mattress label? We need to get that bed." Sleep is a critical element of rest and recuperation, so don't look at your hotel as an afterthought; think of it as a central component of your trip.

9. Get physical exercise. We don't always think of physical activity as relaxing, but it has tremendous benefits for your brain's rest and recovery. If you're staying on a beach, don't just soak in the water, do some real swimming, go for a long walk up and down the coastline, or play beach volleyball! If you're in a city, walk everywhere instead of taking Ubers or cabs.
  
10. Build in some alone time. Alone time is incredibly valuable for your rest and unless you live alone, your alone time is most likely at the gym, on your walk to work, or in a meeting room at the office, which is not very restful. Having alone time on a vacation is an excellent way to put your brain straight into "wakeful rest" mode where it can wander off, be creative, form new connections, and recalibrate.



## Taking PTO When You Don't Have A Vacation Fund

One of the most common reasons people do not take PTO is because they don't have money to spend on a vacation. It's critical to understand that you can absolutely get the benefits of a vacation and take advantage of your PTO on a tight budget. It's not as simple as saying "take a staycation," but with some careful planning, you can achieve the states of "play" and "wakeful rest" that are so critical to your R&R.

**You can stay in a hotel or Airbnb in your own city or a nearby area that you can access by car or train.**

Leaving the space you live in 24/7 is a critical component of rest - even if you're only going a few miles away. This is because our habits are largely environmental. Evidence can be seen for this from the Vietnam war. It's a gloomy subject, but it is one of the most powerful ways to explain the relationship between environment and habit formation. Twenty percent of soldiers stationed in Vietnam became addicted to heroin during their time there, yet upon their return home, 95% stopped their drug use immediately, without any rehabilitation or specific addiction treatment.<sup>5</sup> It was simply due to a change in their environment. Your habits at home might not be that bad, but changing your environment is still critical because it gives your brain a chance to recalibrate and start the recovery process.

**You can do activities you've never done before.**

Finding activities you've never done will stimulate your brain in new ways and ultimately help you feel more rested. If you're staying in a city, you can

<sup>5</sup> <https://jamesclear.com/heroin-habits>

look for museums you've never been to, restaurants you've never eaten at, or shows you've never seen. If you're out in nature, you can look for activities like kayaking, mountain biking, or yoga.

### **You can spend lots of time alone or vacation with someone new or a group.**

If you're someone who spends a lot of time with friends and family, taking a solo vacation might be the key to optimizing your R&R. If you're someone who doesn't spend a lot of time with other people, taking a vacation with someone you've never travelled with before or a small group of people might be the key to optimizing the experience. The people you're with (or lack thereof) have a massive impact on your vacation experience, so think through this very intentionally when planning your vacation.

### **You can spend your time at home doing different things.**

If you don't want or can't afford to take a trip, you can also take a staycation. Over 63% of Americans have taken staycations as of 2020. Many people receive satisfaction from staying home and vegging out on the couch watching Netflix or playing video games, finally getting the time to work on home DIY projects, or taking the kids to the park in the middle of the day.

While the mental and physiological benefits may be less pronounced than that of an out-of-town vacation, even a staycation can do wonders for your mental state if you can separate yourself adequately from work.

At the end of the day, taking PTO should not break the bank. In fact, if you DO break the bank, you may be causing yourself more stress upon your return, because then you'll need to pay off the vacation you just took. With some careful planning, you can achieve the R&R you need in just a few days with just a few hundred dollars.



## 5 Common Mistakes

Some of the most common mistakes people make when it comes to taking PTO include:


1. Taking PTO last minute. When you do this it either means you're a poor planner (which looks bad on you professionally), or it means you've burnt out, have pushed yourself too hard, and simply cannot work more without a break. Don't wait until you need PTO to take it. It's like buying a spare tire—if you wait until you need one, it's already too late.
2. Spending too much time on PTO. If you're meeting or exceeding expectations at work, you should be able to take all the PTO you want! But make sure you have that discussed with your manager to make sure you never overstep. If you have unlimited PTO and you're in Sales, and you've exceeded your quota the last 2 quarters, your manager probably won't care if you take 2 weeks or 8 weeks of PTO in a year. But if you're in Customer Success and you have a lot of at-risk customers and you're taking your fourth week of PTO in a year, you may be putting your job at risk. Once you go beyond 2-3 weeks of PTO, it's always a good idea to check in with your manager to make sure you aren't taking too much.
3. Thinking "recuperation" means the same thing to everyone. Everyone relaxes differently. Some people love the beach, some people hate the beach, some people love museums, some people hate museums. It's important to not only reflect on what kinds of vacations you find most relaxing, but also to make sure you are completely aligned with your travel companions.

4. Working a tiny bit while you're away. It's tempting to do a quick work check-in in the middle of your vacation so that you can feel calm knowing that you aren't coming back to a crazy amount of messages, emails, and fires. Resist this urge. It's critical that you fully unplug and remain unplugged so that your brain can maximize its recovery time.
  
5. Doing too much on vacation. We know you've never been to Paris and you want to see it all, but if you try to do too much, you might not get the recuperation that you really need. Don't fill your itinerary with constant hikes, museums, beach trips, family visits, and stops at every famous café in the city. We all know that when it comes to work, it's better to do a few things very well than take on too much and see quality dip, so adopt that mentality for your vacation. Do a few things and enjoy them thoroughly, rather than trying to squeeze it all in and potentially adding stress.

# A New Kind Of Vacation Checklist

If you're looking for packing lists or example itineraries, you can very easily search for things like "what to pack for a beach vacation" or "Paris vacation itinerary" and customize what other people have done to your own preferences. That's why we wanted to create a new kind of vacation checklist you won't find anywhere else online—one focused entirely on making sure you're making the most out of your PTO, not just seeing all the hotspots in any given city.

## The PTO Prep Checklist

Task	
Give PTO notice at least 1 month in advance (barring special situations)	
Book your actual vacation details 1-6 months in advance	
Add your OOO dates to your calendar, Slack status and email signature (bonus points for a funny OOO message)	
Block off the 2 days after you come back in your calendar to catch up on work	
Determine coverage for while you're gone	
Talk to colleagues your PTO will affect	
Talk to customers your PTO will affect	
Decide what needs to get done before you leave	
List out what work you'll be coming back to	
Get feedback/approval on the above two tasks from your manager	
Create an itinerary for your trip with 1 key activity per day (no more, no less) - remember each day should have an element of "play" and an element of "wakeful rest"	
Build some alone time into your itinerary, even if it's just a short walk each day	
Create a new vacation user account on your computer with nothing logged in	
Delete work-related apps from your phone	



## Conclusion

There are numerous reasons people don't take PTO, but whatever the case, everyone agrees that burnout is a problem, people are more anxious and stressed than ever before, and that something needs to change. You know there's a major problem when profit-driven companies are forcing employees to take PTO.

Beyond simply taking PTO, there's also the challenge of knowing how to properly vacation in such a way that allows your brain to rest, recharge, and become more creative, enabling you to come back to work completely energized. People also have a specific idea of what they think a vacation is, which is problematic because everyone relaxes differently (some like beaches, some like museums), but everyone also has different financial means available to them, which can result in people taking on debt to fund vacations they can't afford, or people taking far fewer vacations so that they can save in between (or pay off the previous vacation).

At the end of the day, what matters most is achieving the states of "wakeful rest" and "play" in a new and/or low-stress environment for an absolute minimum of three days (a full week is best). It's also critical to spend time not only planning the vacation itself, but what's happening before and after your vacation as well, since many people report that they are at their most stressed before they leave for vacation and after they come back.

