proximo

Leave & PTO Policy

- o Are PTO days clearly defined and communicated?
- o Are leave accruals tracked in real-time?
- o Is your carryover or use-it-or-lose-it policy clear?
- o Are sick/mental health days separate and visible?
- o Are floating holidays or flexible days available?
- o Have you recently benchmarked against peers (e.g., Monday.com)?

Remote Work Policy

- o Are hybrid/remote expectations documented and up to date?
- o Have you clarified notice periods for WFH or "work-from-anywhere" days?
- o Are time zone coordination and availability guidelines shared?
- o Is remote work approval streamlined and transparent?
- o Are cybersecurity and device policies enforced?

Holiday & Coverage Planning

- o Are critical finance ops covered during popular vacation weeks?
- o Have you assigned backups for payroll/invoicing/month-end tasks?
- o Are managers reviewing overlapping time-off requests?
- o Is your calendar shared for visibility across teams?

Mid-Year Communication

- o Has a mid-year policy refresh memo been sent to all staff?
- o Are updated policies accessible in the HR portal?
- o Is there a quick-reference FAQ or checklist available to employees?

Trends & Benchmarking

- o Have you reviewed leave data to flag under- or overuse?
- o Are any departments showing signs of burnout or leave inequality?
- o Have you met with HR to compare against market standards?
- o Have you considered running an internal pulse survey?

Tip:

Set a calendar reminder each June to run through this checklist and align with HR, Finance, and Ops leads. A few hours of planning now can save weeks of stress later.