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Filling in the gaps

Every template has square brackets in it. They are prompts, not instructions: swap them for your own words, or lift one of the examples here as-is. Nothing in this guide has to be used.

One or two examples is always enough. You never need to name a diagnosis, explain a history, or justify what helps you.

Names and sign-offs (all templates)

[Manager's name], [Colleague's name], [Employee's name], [Client's name], [Your name]: use whatever you'd normally use in email with that person. If your team signs off with first names only, do that here too.

01 Support with assessment

The only real choice here is how much detail to give.

- Name the route if you want to: "an autism assessment", "an ADHD assessment", or leave it as the general wording.
- Ask for one thing rather than three: funding, time off for appointments, or a pointer to internal resources.

02 Personal update (private disclosure)

[brief example, e.g. need a bit longer to process things in meetings]

- need a bit longer to process things in meetings
- prefer written instructions to spoken ones
- find an open-plan afternoon draining
- work best when I know the agenda beforehand
- ask very direct questions, which isn't bluntness

[you / here / the team]

Pick whichever is true: "how much I value working with you", "how much I value working here", or "how much I value the team".

03 Personal update (team disclosure)

[1–2 examples of things that help me work well]

Choose ones the team can act on without any effort, and that quietly help everyone.

- written follow-ups after meetings
- a heads-up before schedule changes
- agendas shared the day before
- decisions confirmed in a message rather than in passing
- camera-optional video calls
- a quiet first hour for focused work

05 Adjustment check-in

[adjustment]

Name the specific thing you agreed, not the category.

- your noise-cancelling headphones
- the fixed desk away from the main walkway
- written summaries after team meetings
- your later start time on Mondays
- the move to a fortnightly, longer one-to-one
- the dictation software we set up in March

Templates 04, 06 and 07

These only need names. Send them as they are. If you want to add a line, add a concrete offer rather than a general one: “I’ve kept Thursday afternoon free if you’d like to talk” lands better than “let me know if you need anything”.

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08 TL;DR meeting recap

[Point 1, 2, 3] · what you discussed

One line each, past tense, no jargon.

- Reviewed your current pension contributions
- Agreed your goal of stopping full-time work at 60
- Talked through the risk level of your ISA

[Next step, with owner and rough timing]

Always say who does it and by when, even if the timing is approximate.

- I'll send an illustration of the two options by Friday
- You'll check your workplace pension statement before we next speak
- We'll meet again in early March to confirm the plan

Before you send

- Share only what you're comfortable with. You can always say more later; you can't unsay it.
- Keep it in your own voice. If a phrase here doesn't sound like you, change it.
- Check every bracket has gone before you hit send.
- You don't owe anyone a diagnosis, a label, or proof.