# How to Prep For Your Out-of-Office

**What you’ll find in this document…**

| **Item** | **Description** |
| --- | --- |
| [OOO Task Checklist](#_oci626ou7a7b) | This checklist will help you prepare for your out-of-office time. It includes things you must set up or address before signing off on your last day. |
| [OOO Message Checklist](#_garcrjqhiq9i) | This checklist is all about crafting the perfect out-of-office and autoreply message. It provides tips on who to address, what to include in the subject line and body, and when to schedule the send. |
| [OOO Handover Template](#_kvz9o320yfyv) | This template provides an overview of tasks, projects, meetings, and essential information your colleagues need to know during your time off. |

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### **OOO Task Checklist**

| **Topic** | | **Check** | **Description** | **Example** |
| --- | --- | --- | --- | --- |
| **Task Reassignment** | |  | Reassign any tasks to colleagues on company project management tools such as Asana or Wrike. | *n/a* |
| **Meeting Reassignment**  (if applicable) | |  | Reassign team meetings to colleagues using the relevant web conferencing tools, e.g., Zoom. | *n/a* |
| **Intercom Status** | |  | Set your Slack or Teams status update with your upcoming OOO to ensure your peers are aware. | ⚠️Upcoming OOO: 19 Aug–29 Aug |
| **Company Calendar** | |  | Set your OOO on your company calendar to ensure no one can book any time during that period. Some calendars have integrations with Slack or Teams and show you as “unavailable” during that time. | *n/a* |
| [**Out-of-office (OOO) message**](#_garcrjqhiq9i)  **(Email & Autoreply)** | |  | Give your team a heads-up about your OOO to ensure everything runs smoothly in your absence. Don’t forget to set up your autoreply so that anyone who tries to email you will receive the relevant information and can redirect their request where needed.  Use the relevant checklist [**below**](#_garcrjqhiq9i). | *n/a* |
| [**Handover file**](#_kvz9o320yfyv) | |  | Provide a thorough Handover file to allow the wheel to turn while you’re off. Use the relevant template [**below**](#_kvz9o320yfyv). | *n/a* |

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### **OOO Message Checklist**

|  |  | **Check** | **Info Required**  **in Out-of-Office (OOO) message** | **Example** |
| --- | --- | --- | --- | --- |
|
| **Pre-OOO**  **Email** | **Schedule send date** |  | *n/a* | 1-2 days before your out-of-office.  *Note: This may vary depending on your company’s requirements.* |
| **To: / cc:** |  | People who should be in the know about your out-of-office. | To: [customer\_success\_department@company.com](mailto:customer_success_department@company.com)  cc: [your\_manager@company.com](mailto:your_manager@company.com), [department\_head@company.com](mailto:department_head@company.com), [person\_covering@company.com](mailto:person_covering@company.com) |
| **Email Subject Line** |  | Your name | 🌴John’s OOO: 19 Aug–29 Aug (inclusive) |
|  | Date of absence |
|  | Date of return |
|  | Emoji *(optional)* |
| **Email Body** |  | Date of absence | Dear team,  I am writing to inform you that I will be out of the office from 19 Aug to 29 Aug, inclusive, for a training seminar in Dallas. During this period, I will not be available to respond to emails.  In my absence, Jane Doe, my manager, will be handling my responsibilities. You can reach Jane at jdoe@company.com for any assistance you may need.  I have also prepared a handover file which you can access [here](#_kvz9o320yfyv).  Thank you for your understanding.  Best regards,  John Smith  Customer Success |
|  | Date of return |
|  | Reason for leave *(optional)* |
|  | Primary back-up |
|  | Secondary back-up (*if applicable)* |
|  | Handover file (linked) |
| **Autoreply**  **Email** | **Email Subject Line** |  | Same as pre-OOO email. | 🌴John’s OOO: 19 Aug–29 Aug (inclusive) |
| **Email Body** |  | Less info than the pre-OOO email, especially if you’re dealing with external stakeholders. | Hello,  Thank you for your email.  I’m currently OOO from 19 Aug to 29 Aug, inclusive. During this period, I will not be available to respond to emails.  For any questions during this time, please reach out to my manager, Jane Doe, at jdoe@company.com  Thank you for your understanding.  Best regards,  John Smith  Customer Success |

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### **OOO Handover Template**

| **Handover File** | | | |
| --- | --- | --- | --- |
| *[Your Name], [Your Role]*  Period of OOO: *[Day Month] – [Day Month]*  Phone for urgent matters: *[Number]* | | | |
|
| **Topics** | **Item** | **Description** | **Date / Deadline** |
|
| **Daily Tasks** | **<Task 1>** | *Details and information* | *If applicable* |
| **<Task 2>** | *Details and information* | *If applicable* |
| **<Task 3>** | *Details and information* | *If applicable* |
| **Projects** | **<Project 1>** | *Details and information*  *PoC: @colleague’s name & @colleague’s email* | *<Date>* |
| **<Project 2>** | *Details and information*  *PoC: @colleague’s name & @colleague’s email* | *<Date>* |
| **<Project 3>** | *Details and information*  *PoC: @colleague’s name & @colleague’s email* | *<Date>* |
| **Meetings** | **<Meeting 1>** | *Agenda and talking points* | *<Date>* |
| **<Meeting 2>** | *Agenda and talking points* | *<Date>* |
| **<Meeting 3>** | *Agenda and talking points* | *<Date>* |
| **Clients / Prospects** | **<Client 1>** | *Status details, potential issues, contact info* | *n/a* |
| **<Client 2>** | *Status details, potential issues, contact info* | *n/a* |
| **<Client 3>** | *Status details, potential issues, contact info* | *n/a* |
| **Useful Resources** | **<Resource 1>** | *<1-2 details on how to use the resource>* | *n/a* |
| **<Resource 2>** | *<1-2 details on how to use the resource>* | *n/a* |
| **<Resource 3>** | *<1-2 details on how to use the resource>* | *n/a* |
| **Important Notes** | *Include any important information that your manager/colleagues need to know.* | | |