

Ideas for Your Out of Office Checklist



KEY TAKEAWAYS

- A well-planned out-of-office checklist prevents workflow disruptions and ensures team members can handle urgent matters while you're away.
- Setting up proxy approvers in your procurement systems maintains approval workflows and creates a clear audit trail during your absence.
- Your checklist should include task handoffs, stakeholder notifications, and automated responses to give you true peace of mind.
- Different roles need different preparations, but everyone benefits from documenting current projects and contact information for alternative contacts
- The right tools make all the difference in achieving a stress-free vacation and maintaining work-life balance.

Why Taking Time Off Matters in Procurement

Taking vacation days should be simple. But for procurement professionals,

stepping away from work often feels complicated.

You manage supplier relationships. You approve purchase orders. You handle urgent matters that can't wait.

The solution is not to skip your time off. The solution is an out-of-office checklist that sets you up for success.

Who Needs an Out-of-Office Checklist?

Everyone who takes time off benefits from planning ahead. But some roles need more detailed preparation than others.

> Out-of-Office Essentials for Employees

Things Every Employee Should Consider Before Taking Time Off Work



Task
Handoffs



Stakeholder
Notifications



System
Access And
Approvals



Automated
Responses



Backup
Contacts

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Procurement managers juggling multiple supplier negotiations need extensive handoff plans. Buyers handling day-to-day purchases need clear coverage arrangements. Finance teams processing invoices need backup approvers in place.

The key is tailoring your checklist to your specific responsibilities and workflow.

Your co-workers probably know you're on vacation. But your customers and other contacts may not, so take measures to ensure things keep ticking along in your absence.

The Real Benefits of Planning Your Absence

An out-of-office checklist gives you peace of mind. It also protects your team members from confusion and delays.

When you document everything properly, stakeholders know who to contact. Current projects keep moving forward. No one scrambles to figure out your password or find important information buried in your inbox.

You return to a manageable workspace instead of a crisis. Your colleagues appreciate the heads up. And you can actually unplug and relax while you're away.

> Why Planning Your Absence Matters

Workflow Continuity



Work Continues
Without Delays

Team Clarity



Everyone Knows
Who Handles What

Reduced Risk



Urgent Tasks Do
Not Get Missed

Peace Of Mind



You Disconnect
Without Worry

Your Pre-Vacation Task List

Two Weeks Before Your Last Day

Start planning early. Review your current projects and identify anything that needs attention before you leave.

Schedule handoff meetings with team members who will cover for you. Walk them through ongoing supplier negotiations and pending approvals.

Update your shared calendar so everyone knows your timeline. Block off focus time to finish critical tasks.

One Week Out

Confirm backup coverage is in place. Send a heads-up to key stakeholders about your upcoming absence.

Create a simple to-do list of tasks that must be completed before you go. Prioritize ruthlessly.

Review your metrics and close out any reporting that's due. Clean up your workspace, both physical and digital.

The Final Days

Finish your handoff documentation. Include contact information for suppliers, status updates on active negotiations, and notes on anything time-sensitive.

Set up your out-of-office message and autoresponder. Record an updated voicemail greeting with alternative contacts.

Turn off work email notifications on your phone. Seriously. This step is critical for true work-life balance.

Essential Elements for Your Out-of-Office

Checklist

> Out-of-Office Checklist Items

- Document Active Projects
- Assign Coverage
- Notify Stakeholders
- Set Auto Responses
- Prepare Return Plan



Communication Setup

Your out-of-office email needs specific details. Include your return date, who can provide immediate assistance, and their phone number.

Keep it brief but informative. Consider a template like this:

“I’m away until [date] with limited access to email. For urgent procurement matters, contact [name] at [email] or [phone number]. For general questions, I’ll respond when I return.”

Set the same message in Slack and any other communication tools your team uses.

Task Handoffs

Document everything someone might need to know. List pending approvals with deadlines. Note supplier contacts and current negotiation status.

Create a simple FAQ document for common questions. Share access to key files and systems.

If you use a systematic onboarding approach for new hires, you already have a framework for documentation.

System Access and Approvals

This is where the right tools make all the difference.

In procurement, approvals can't just stop because you're on vacation. Purchase orders need processing. Invoices need payment. The workflow must continue.

PLANERGY's out-of-office functionality solves this problem elegantly. You can assign a proxy approver who handles approvals on your behalf while you're away. The system maintains a full audit trail, tracking each order as "approved by [proxy name] on behalf of [your name]."

This creates transparency and accountability. Nothing falls through the cracks. And you don't need to check your email from the beach.

Setting up proxy approvers requires planning. Do it before your last day, not the morning you leave.

Financial Considerations

If you handle budgets or approvals, ensure someone can access what they need. Update spending limits if necessary.

Teams with clear financial processes know the importance of maintaining continuity. The same principle applies to your vacation coverage.

Review pending invoices and payment schedules. Flag anything time-sensitive for your backup approver.

Role-Specific Checklist Considerations

Procurement Managers

Your checklist needs extensive supplier relationship management notes. Document ongoing negotiations, pricing discussions, and contract renewals.

Prepare summaries of major initiatives. Brief your team on strategic priorities that might arise while you're gone.

Consider creating a decision-making framework for your proxy. What can they

approve independently? What should wait for your return?

Category Managers

Focus on supplier performance issues and quality concerns. Document any active disputes or corrective action plans.

Update your team on category strategies and spending trends. Share access to your data-driven organization dashboards and reports.

Prepare a quick reference guide for your key suppliers and their escalation contacts.

> Out-of-Office Checklist Priorities By Job Role



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Buyers and Requisition Processors

List pending purchase orders and their expected delivery dates. Note any special

handling requirements or rush orders.

Ensure someone can access your requisition queue. Set up appropriate permissions in your procurement system.

Document supplier preferences for different product categories. This helps your backup make smart purchasing decisions.

Finance Team Members

Create a payment schedule showing what's due during your absence. Highlight any critical supplier relationships that need timely payment.

Set up proxy approvers in your financial systems. Test the workflow before you leave to avoid surprises.

Share access to vendor files and payment history. Include notes on any payment disputes or holds.

The Power of Automation

Manual handoffs create risk. Someone forgets to check an email. A critical approval sits in a queue. A supplier doesn't get paid on time.

Automation removes these risks.

Modern procurement platforms let you automate workflow routing. When you're out, approvals automatically go to your designated proxy. Notifications reach the right people. The system handles the follow-up.

This is particularly valuable for procurement professionals managing complex approval chains. Automation streamlines your absence management the same way it streamlines your daily processes.

Set up rules before you leave. Test them. Then trust the system to work.

Other Checklists That Support Your

Success

Planning your absence is just one type of preparation that makes procurement run smoothly.

Throughout the year, you might use multiple checklists:

- A new employee onboarding checklist for bringing new team members up to speed
- A software implementation checklist when rolling out new procurement tools
- A supplier negotiation checklist for strategic sourcing projects
- A year-end accounting checklist for closing the books
- A SaaS security checklist for protecting your systems and data

These frameworks share a common thread. They reduce risk through preparation and documentation.

Your out-of-office checklist fits naturally into this system. It's another tool for professional excellence and peace of mind.

> Coverage While You're Away

Features of Procurement Software That Stop Vacation Becoming a Disruption

Proxy Approvers



Approvals Continue Without Delays

Audit Trail



Actions Are Tracked And Visible

Automated Routing



Tasks Go To The Right Person

Permission Control



Access Matches Responsibilities

Should You Stay Connected While Away?

Here's an uncomfortable truth. Checking work email on vacation defeats the purpose of taking time off.

Your brain needs a complete break. Partial disconnection doesn't provide the same benefits as truly unplugging.

Turn off work notifications on your phone. Don't "just check quickly" each morning. Trust your team and your preparation.

If you've set up proper coverage and proxy approvals, you don't need to monitor your inbox. Your absence checklist and automation handle it.

The only exception is if you're on call for genuine emergencies. In that case, set clear boundaries about what constitutes an emergency and how you'll be reached.

For everything else, let your out-of-office message and alternative contacts do their job.

Preparing Your Physical and Digital Workspace

A clean workspace makes returning easier.

File loose papers. Clear your desk of coffee cups and sticky notes. Organize any documents someone might need to reference.

Do the same for your digital workspace. File emails into folders. Update your task list. Close browser tabs.

This isn't just tidiness. It's consideration for anyone who might need to access your workspace while you're gone.

Good office management practices extend to your absence preparation.

Creating Your Standard OOO Template

Save time by creating a template you can customize for each absence.

Include standard sections:

- Stakeholder notification list
- System access checklist
- Handoff documentation outline
- Autoresponder text
- Key contacts and phone numbers

When your next vacation approaches, pull up your template and fill in the specifics. This consistency helps your team know what to expect.

Update your template after each absence based on what worked and what didn't.

The Return: Your First Day Back

Your out-of-office checklist should include a plan for coming back.

> Returning from Out-Of-Office: Employee Checklist



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Block your first morning for catch-up. Don't schedule meetings immediately upon return.

Review your voicemail and email systematically. Respond to urgent matters first.

Meet with your proxy approver to review what happened during your absence.

Thank them for their coverage.

Gradually ramp back up to full speed instead of trying to do everything at once.

Take Your Time Off With Confidence

An out-of-office checklist transforms how you take time off.

Instead of returning to chaos, you return refreshed. Instead of worrying on the beach, you have peace of mind. Instead of your team scrambling, they have clear guidance.

The investment in preparation pays dividends in reduced stress and maintained productivity.

Start building your checklist today. Document your processes. Set up your proxy approvers. Create your templates.

When vacation season arrives, you'll be ready to truly unplug and recharge.

What's your goal today?

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