Creating a Standard Operating Procedures Manual:

An Essential Business Tool for Every Office

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EXECUTIVE SUMMARY

Creating a Standard Operating Procedures Manual:

An Essential Business Tool for Every Office

by Patricia Robb

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Introduction

When leaving your job for whatever reason—going on vacation, getting promoted to a new position or nearing retirement—are you suddenly scrambling to write everything down for your replacement two weeks before you depart? Or, if you've just arrived at a new job, do you wish someone had left behind some written instructions so you wouldn't have to keep bothering your new co-workers with questions?

And, does it seem that your organization invests a lot of time and resources in its employees, but when staff members depart, they take all that corporate knowledge with them? Wouldn't it be nice to retain that knowledge in writing for your company?

The solution? In situations like these, the way to keep business operations humming along is by having a standard operating procedures manual in place for every position in your organization.

At first, the idea of documenting all your responsibilities and compiling a manual may seem too daunting. But in this special report, administrative expert Patricia Robb walks you through the process step-by-step, and along the way she provides several handy sample documents to get you started. You'll learn how to create a standard operating procedures manual for you, as well as every member on your team. The end result will be a product that can be used over and over again by you or anyone else who needs it.

With a procedures manual in hand, you and your organization will have the peace of mind of knowing that someone could step in and fulfill your responsibilities without causing a major disruption to your department or to business operations.

About the Author

Patricia Robb is the author of *Laughing All the Way to Work: A Survival Blog for Today's Administrative Assistant.* Patricia has been an administrative assistant for almost 30 years and is currently an executive assistant to the CEO of a not-for-profit organization.

A member of the International Association of Administrative Professionals, Patricia is an administrative expert, and often provides tips on her blog for improving her fellow admins' skills, helping her colleagues be the best they can be.

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by Patricia Robb

1. The Case for Writing Procedures Manuals

Several decades ago, I recall coming back from vacation and my boss telling me how happy he was that I was back. He said the office had been a disaster without me. I have to admit I felt rather irreplaceable—and I probably wasn't the only administrative assistant who felt that way in those days. Knowing we were the only ones who knew how to run the office gave us a feeling of job security and value.

Of course, nowadays that would never work in an office, where the culture fosters teamwork, collaboration and sharing information with one another. We need to let our co-workers know what we're up to, and when we take vacation or have to be away unexpectedly, someone else should be able to step in and cover for us. No, we are not irreplaceable, but we can be seen as indispensable by documenting what we do— in today's office, that's what will get you noticed by your boss as exceptional.

Two of the main reasons for having procedures manuals: to ensure business continuity and help facilitate succession planning.

Business continuity

On Sept. 11, 2001, I arrived at work just like any other day. At 9 a.m. I was settling into my morning routine and logging on to my computer when the phone rang. My daughter was calling to tell me a plane had just crashed into the World Trade Center in New York. Once the news spread throughout the office, we quickly gathered in the lunch room and turned on the TV. When the first building collapsed, we stood there in disbelief, but when the second building came down, our employer escorted us out the door and sent us all home.

When we came in the next day, it was to a very different office than the one we had left. Like employers everywhere, our company quickly realized it needed to develop an emergency disaster plan to continue business operations, whatever the cause might be—a terrorist attack, a natural disaster, a flu epidemic or other unexpected event.

In our office, the executives huddled in the boardroom and drafted a plan, which included securing an off-site location for us to meet if we were ever unable to be in the office. They made arrangements for an external host to house our remote server so even when our onsite server room wasn't available, we could still go online and access our company files. They also distributed an emergency roster call list. Business continuity planning had begun in earnest, and having procedures documented in writing was a major part of that process.

Note: Although disaster planning and emergency preparedness are the responsibility of your entire organization, the procedures documented by your administrative staff in their own manuals will contribute to the success of your organization's preparedness. If your company has a disaster plan in place, you should review it and then add references to any relevant policies and processes to your own procedures manual.

Business continuity also requires that we document our tasks so someone else can fill in for us. I recall a friend telling me that when her colleague went on vacation, her job basically went on vacation, too. Her voicemail simply said she was away for two weeks and could be reached upon her return. Today, that should never happen.

When we are away from the office for whatever reason, business should not screech to a halt. We should have a plan in place for who will replace us and should leave instructions on what tasks need to be done. The procedures manual serves as an excellent resource for this.

Succession planning

When I move out of a residence, I always like to leave a clean house behind and hope my next place will be in equally good shape. The same holds true when leaving a job. I want the person coming into the position to have as much information as possible. That way, my organization will have minimal downtime while the new person gets up to speed. I also want to leave with a good conscience, hoping that I've done everything possible to assist in the transition. Besides helping the new hire, you leave knowing the company appreciates what you have done—and that kind of goodwill can go a long way in your career.

Succession planning means planning ahead. Your company must be able to identify the specific skills and qualifications needed in your replacement and have a list of possible candidates in hand. It should also have the tools in place to accelerate a smooth transition for whoever is hired. A procedures manual is perfect for this. However, don't wait until two weeks before you leave a position to write everything down! Having a well-thought-out procedures manual is the next best thing to being at the new person's side.

In our organization, the admin team took on the task of writing manuals for all our positions. Because of the similarities in duties, we were able to create a template of what everyone did. Then each admin was responsible for customizing the template to her position and adding particular points about her job. It's been a very successful exercise, and we've been told by new hires how much they appreciate having this resource.

Recently, when an employee took an unexpected sick leave for a few months, we were able to test the value of the manuals. We quickly hired a temp and set her up with the manual, and the transition went smoothly. It helped her and us.

2. Creating a Manual: Where to Start

When I attended a writer's conference, one of the first things they recommended when writing a book was to create an outline as a guide to keeping the storyline on track. The same can be said for a procedures manual.

You should arrange your duties in a logical format in a table of contents to map out how you want to place each item. Once you have the table of contents completed, you can go back and fill in the details.

In Appendix A *(see page 12)* you'll find a Sample Table of Contents with some suggested topics to include in an administrative assistant's procedures manual. But, basically, you should document what the job requirements are and provide instructions on how to perform each task. For instance, if you are responsible for taking minutes for a senior management team, it's likely you also need to organize the meeting, draft the agenda, take the minutes and follow up on action items. These are the types of entries to include in your procedures manual.

Note: A procedures manual should not be confused with a new-hire orientation manual, although in smaller organizations they may combine the two. An orientation manual includes various company policies, information about the benefits plan, a floor plan of where everyone sits and information on the organization's staff. New hires will also be introduced around the office and shown where the lunch room and restrooms are. Typically, your human resources department will handle that part of it, and the IT department will set them up on their computers and provide them with instructions. But when new hires actually sit down at their desks, they need directions on how to do their particular jobs. That's where a procedures manual comes in.

New hires should already have a general idea of their position's requirements from the job posting and what they were told in the interview. But they have much to learn, and most people want to get started right away on their work. Having a manual from the outset provides information on what needs to get done, and they can refer back to it time and time again as they progress in their jobs.

You should keep a master copy of the procedures manual in an electronic format since it's a living document and will need updating regularly as information changes. Also, an electronic version is useful since you're able to search it easily, although having a printed copy at your desk is handy to thumb through when you need it.

I recommend that, at the very least, you have a quick reference manual in hard copy at your desk. This should include emergency contact numbers, information on vendors, catering companies, the landlord, the photocopier repair company, the alarm company, couriers, instructions and other information you need at your fingertips. *Note:* This would be the document you would take with you if you had to evacuate the building on short notice.

Otherwise, your larger, more detailed manual can be kept online, set with only you having administrator rights so someone can't accidentally delete it. If someone else needs access to it, they should have read-only rights.

Nowadays, the ability to have remote access from home or virtually anywhere in the world has made it much easier to rely on electronic documents. But in the event of a power failure, having a hard copy is the best backup.

I recommend reviewing and updating your manual at least every six months, but ideally every three months. The more often you review it, the less work updating it will be and your manual will always be current—the only thing worse than not having a manual is having an out-of-date one. As you review your manual, it also helps reinforce your knowledge about your job duties.

3. Tools and Resources for Your Manual

An activity log

In a procedures manual you need to document all the tasks you do. However, since some activities are routine, you can easily lose track of them. The best way to sort it out is to start keeping an activity log. An activity log is simple, easy to use and can become a valuable tool. *(See a Sample Activity Log in Appendix B, page 14.)*

You should print a copy of the activity log and keep it in a prominent place at your desk. When you perform a task, quickly jot it down, along with the time spent on the activity. If you track what you do for a few weeks, you'll note not only the routine things you do, but also other tasks—such as preparation time, special projects and other areas of your job—that you might have missed otherwise. The information you gather from the activity log will help you get started on what to cover in your procedures manual, and you can start populating the draft table of contents with these items.

Some tasks may seem trivial, but for new hires coming onboard, they need to know in minute detail what their responsibilities are. For example, each morning our receptionist is responsible for printing the Out-of-Office Calendar and posting it on the Health and Safety Board. In the event of an emergency, the safety captain would refer to the calendar to see who is away that day so he would know who needs to be evacuated. It's a seemingly small task for the receptionist, but an important one that should be documented.

Of course, when writing a procedures manual, it's reasonable to assume that a new hire is skilled in this particular type of work, so instructions on how to perform simple tasks—such as how to send a meeting request—aren't necessary. But you should include information on your company's meeting culture, how your boss likes his or her meetings named in the calendar and the boss's preferences for setting up meetings. Or, say, your organization has a specific script for answering the phones or you need to dial 9 for an outside line, then also include that information in the manual.

Your job description

An obvious resource for your procedures manual—but one often forgotten— is your job description or the position profile. It will give you a good idea of the basic duties required for the job. You should review the tasks noted in your job description and include those in your draft table of contents for the manual.

Note: This might also be a good opportunity to update your job description with your boss if you find that it's out of date.

Checklists and templates

Checklists can be invaluable as a way to document processes and as a reminder of next steps. Whenever you work your way through a process, write it down and turn it into a checklist. It will help not only the next person, but you as well the next time you have to perform that same task.

You should include checklists in your procedures manual. The same applies for any templates you have created, or the company prefers you to use, such as templates for meeting minutes, agendas, electronic letterhead or a standard letter or email. I would suggest adding them as appendices so they are easily accessible to use. Or, if you don't include them in your manual, you should refer to them and provide links to the location of those documents.

In Appendix C *(see page 15)*, you'll find examples of some possible checklists to put in your manual. You can customize them to your own needs if you don't already have some checklists.

Screenshots

The saying that a picture is worth a thousand words can be summed up in a screenshot. Just as with checklists and templates, using a screenshot can save you time when creating your manual. Screenshots can explain a process without a lot of writing, and they're easy for the reader to follow because they have a picture of the information you want to convey.

Signs and instructions

Not all procedures need to be put in your manual. Instead, you can create them as signs and instructions to post where needed throughout the office. Some examples from our office:

- Our office kitchen is self-serve so we have instructions on the dishwasher on how to use it. There's also a sign on the coffee machine to indicate how to turn it on and instructions on making the coffee.
- Our fax machine requires dialing a 9 to send a fax to an outside line so there's a small label with that information on it.
- The photocopier paper tray has a sign that letterhead should be placed facedown with the letterhead toward you. It also has a label with the number to call if it needs repairs.
- In our boardroom we have a manual with instructions on how to use the equipment located there: such as the videoconference equipment, projector, teleconference phone, web-hosting software and whiteboard.

Our admin team created these signs and instructions to help other staff members make their way around unfamiliar territory and also to let them know what to do if we aren't around to help. *An added bonus:* Posting signs and instructions has cut down on interruptions to our admin staff throughout the day.

Using your networks

Another source of information and ideas on topics to include in your procedures manual is through your networks. You can go online and start a discussion on the topic or do a search for information. Or, you can ask for suggestions and recommendations from other admins in your organization or members of a professional association, such as the International Association of Administrative Professionals (IAAP).

Also, if you have the opportunity to meet with the person who previously held the job, she would be a valuable source of information.

4. Guidelines on Writing Procedures

To write good procedures, you have to put yourself in the shoes of someone who doesn't know how to do a task and walk her through it. This can be difficult when writing about something you're so familiar with. *Here's an oversimplified example:* Think about an IT person who works with computers day in and day out, and someone comes to him wanting to know how to start her computer. The answer he would likely give is to enter the user name and password, not realizing what the person really wanted to know is how to get the ON button to work.

When writing any procedure, walk yourself through the steps and document them as you go. If you document the steps in a checklist, that's a good way to set them out in easy-to-read fashion. Once you have a procedure documented, go back and reread it to see if it makes sense or ask someone not familiar with the task to try it based on your written instructions.

Confidential information

Unless your job manual is located in a secure location (electronic or hard copy), I would not recommend putting anything confidential in it, including passwords.

Keep your passwords and other confidential information in a separate location to avoid someone getting ahold of not only your job manual, but also all the passwords to access your computer system. I keep my passwords in a folder in my Outlook account, but some people have all their passwords saved in an Excel spreadsheet, which only they can view. If you have them in hard copy, a locked drawer would also be a good place to store them. Wherever you store them, make a note of it in your manual.

Keep references generic

A procedures manual is meant to be passed on from person to person, so I would recommend that you use position titles rather than the actual names of staff in those positions, including yourself.

In my own manual, I use the term "this position" when referring to my duties, such as "this position is responsible for supervising the receptionist" or "this position reports to the CEO.…"

5. A Typical Day

In our office, a typical day for me involves these tasks:

- Check my wait bin for any pending items that need to be dealt with
- Look at my to-do list of work for that day
- Check my email and voicemail
- Have a quick meeting with my boss to touch base on what's on our plate that day
- At the end of the day, prepare my boss's meeting package for the next day.

These are routine tasks I do almost every day. I've created a document with these daily tasks noted on it—what I call my Typical Day Checklist. You should create a similar checklist to include in your procedures manual to show at a glance what your day looks like.

This kind of checklist is ideal for short-term replacements. When I'm going to be away from the office, I meet with my replacement and give her a copy of my Typical Day Checklist. I let her know where my procedures manual is located for more detailed information if she needs it. I also include a copy of an Out-of-Office Checklist I created for times when I'm away *(see sample in Appendix C, page 19).* It helps me remember to do the things on the checklist, and also lets my replacement know I have done them. I write any passwords she will need on this checklist.

You'll find a sample Typical Day Checklist in Appendix C *(see page 15)* to show how the duties are sectioned out. In this particular example, it's for a receptionist position, but it gives you a good idea of what to include. When our receptionist goes on vacation, she sets a schedule for those who are replacing her. Because she has this checklist already created, she just needs to provide us with a copy, and we go through the list and perform the tasks assigned to us. It makes it easy for everyone, and now she can go on holidays stress free, knowing everything is being taken care of.

6. Less Is More

I recall my first day at my previous job. After I had signed all the personnel documents, I was escorted to a small office and handed a 3½-inch-thick binder stuffed with information. They asked me to read it in its entirety and then sign a form confirming I had done so. I'm not sure I retained anything out of that exercise—it was just too much information, and at the time most of it seemed irrelevant.

A job manual doesn't need to be 200 pages long. As a matter of fact, less is more. You want to include all the essential information and be specific without being wordy. If the manual is too large, it will end up not being used because it's hard to find anything and there's just too much to read.

The goal should be to create a manual that allows you and others to easily retrieve the information needed to do your job. You should use checklists to explain a process or bulleted lists to cut down on the word count.

7. Finalizing Your Manual

Employees often wonder what they should include in their manuals. The answer is: Everything you need to get the job done. You can start off with information about your company—the nature of its business, its mission, vision and goals. Make sure to include an organizational chart and show where your position fits in, as well as a company phone list. You should also explain your department's mandate. The more a new person knows about the company, the better she will understand her role.

You should provide an overview of your position and your boss's, what specific tasks you do for the boss, as well as his or her likes and dislikes. Then you can document these tasks with procedures on how to accomplish them, including checklists and templates.

Also include general information, such as hours of work, the people on your team, how to transfer a call, and what to do if you happen to get an upset customer on the line. Many of the topics that are in your manual will be from other departments, and you can easily link to their specific documents or procedures.

When you produce a printed manual, it should be in a binder with a table of contents, tabs and numbered pages—in a format where it's easy to find things. If it's electronic, styles should be used for the headings, a table of contents generated and pages numbered.

(See Appendix A, page 12, for a Sample Table of Contents of possible topics to include in your procedures manual.)

8. Conclusion: A Win-Win for Everyone

Writing a procedures manual ultimately benefits everyone—not only the next person coming onboard, but also you, your team, the boss and the entire organization. Producing a manual will show your employer that you took initiative and leadership in tackling this task and that you are committed to the organization's success.

Recently, our admin team was recognized at the annual all-staff retreat for accomplishing our goal of completing our procedures manuals. I also encouraged all our team members to note this achievement on their performance appraisals as a goal they had met. This certainly added value to each admin's career, but also to the team as a whole. (At performance appraisal time we need to shine a light on all our accomplishments—it's not the time to be shy and hold back.)

If you're fortunate enough to be provided with a procedures manual when starting a new job, take the time to read it and use it to help you quickly get into the routine—someone has taken a lot of time to prepare it. If you don't have a procedures manual for your current job, consider creating one. It will be a valuable tool.

I recall when a woman started a position in our organization. I gave her the procedures manual, and she took it home. The next day she came in with questions. I could see the manual was well marked up with her handwritten notes, and flagged in places where she had questions. That showed me this person was really interested in succeeding in her new job. And since she had read the manual, we could then direct our discussions to other topics we needed to cover and it was a better use of our time.

Having a procedures manual will drastically cut down on the amount of time it takes to get up to speed in a new job, and that's a win-win for everyone.

Appendix A: Sample Table of Contents for a Procedures Manual

Appendix B: Sample Activity Log

Date:	
Activity	***Time Spent***
Travel arrangements and preparing documentation for visa application	30 minutes
Meeting organization	10 minutes
Telephone call with vendor	5 minutes
Registration desk at conference	30 minutes
Relieve receptionist for lunch hour	60 minutes
Develop to-do list for next board meeting	30 minutes
Attending meeting and taking minutes	2 hours
Telephone call with client	5 minutes
Taking telephone message and sending to boss by email	10 minutes
Drafting minutes	60 minutes

NOTE: An activity log can also be an excellent time management tool. As you note how much time you're spending on certain tasks, you may want to re-evaluate the order in which you're doing them and/or the processes used.

When I was working in a law firm, I was frustrated because I just couldn't seem to get anything done. I thought it was my workload, but a colleague suggested I try using an activity log. I admit my first thought was, "Great, one more thing for me to do!" but I was surprised because it really did help. After a few days I could see that I was spending lots of time throughout the day with clients on the phone. It was necessary to do this, but after reviewing my log, I decided to block time in the afternoon to make the calls, which freed up my morning to do my other work. I also found other areas where I could be more efficient, so it was a valuable exercise and worth the time to do it.

Appendix C: Sample Checklists

Typical Day Checklist

CHECKLIST FOR RECEPTIONIST COVERAGE	√
MORNING	
• **Print Out-Of-Office Calendar and Tack It to the Health and Safety Board in Staff Room**	
• **Make Coffee at Executive Office Station:** *A fresh pot of coffee should be made every morning and place the" fresh sign" on top of coffee pot (instructions for making coffee are on the coffee maker). Make sure there are at least four clean cups and two water glasses on the counter. Add fresh water in the kettle, which is located beside the fridge.*	

• **Pick up Newspapers:**
You will need to go downstairs (to the basement under the stairwell) to pick up the newspapers for the office.
  • *A copy of each newspaper should be placed in CEO's office.*
  • *All other copies should be placed in the reception area.*	

• **Sort the Mail:** *Sort and date the mail when it arrives and put in appropriate mail slots.*	
GENERAL	
• **Check Reception Voicemail Frequently:** *When the message button is flashing red, press the button and enter the passcode and then follow the prompts.*	
• **Keep Reception Area Tidy:** *Make sure the chairs are placed against the wall, the small table is litter free and the reception front top is wiped clean.*	
• **Couriers:** *When preparing for courier deliveries, please make sure you make a copy of the waybill and put it in the tray for the Receptionist.*	
END OF DAY	
• **Print Calendars for Boardrooms:** *Print a copy of each boardroom schedule for the following day, place in plastic holder and put on credenza in boardrooms.*	
• **Clean Boardrooms:** *Clean the boardrooms, using a wet cloth, warm water and a small amount of soap to clean the table, black mats and credenza and wipe dry with a dish towel. You will find the cloths and dish soap in the kitchen and the gray tub on top of the fridge. Straighten chairs and remove any dishes left behind and place in dishwasher.*	
• **Videoconference Equipment:** *- Plug in the Boardroom i-Pad to recharge it* *- Re-seat the microphones in the charger units*	
• **Tidy Kitchen:** *Ensure all is in order in the kitchen (place old newspapers in recycling bin, empty and rinse coffee pot, wipe clean the counters, start the dishwasher and turn off the lights).*	
• **Outgoing Mail:** *Check the Outgoing Mail tray on the top right of the desk for any mail that needs to be sent out, and drop it in the mailbox downstairs on your way out of the building.*	

Travel Arrangements Checklist

Name of Traveler:	
Purpose of Trip:	
Location:	
Date:	
Will anyone else from the organization be attending?	

To-do	√
Purchase Order Number *(or financial information for payment)*	
Book Travel: *flight, train, driving (car rental/personal vehicle— will you need to calculate mileage?)* ***NOTE: CEO prefers to fly Air Canada, aisle seat***	
Book Hotel ***NOTE: CEO prefers Starwood properties***	
Registration	
Expense Report *(for when CEO returns)*	
International Travel:	
Is a visa required?	
Are there any immunization requirements?	
Register with embassy abroad. *(Some countries have an embassy website where you can register any travel abroad. In the event of an emergency, they would use this list to determine which citizens are in the country affected and need to be contacted and possibly evacuated.)*	
Check for any travel advisories/warnings or alerts	

Question to ask yourself: What would I need if I was going to the meeting/traveling (and then make sure your boss has it)?

Meeting Setup Checklist

Name of Person Attending Meeting:		
Meeting Name:		
Location:		
Date:		
Item		√
Flight arrangements *(This can be arranged through the travel agent—at a cost— as well as by the admin assistant.)*		
Hotel accommodation/Meeting venue *(This can be arranged through the travel agent—at a cost— as well as by the admin assistant. However, it is preferable to be done by the admin assistant. But if it is out of town, it is often necessary to go through the travel agent.)*		
Arrange for catering, if needed. *(Catering needs can be arranged directly with the hotel by the admin assistant with the assistance of the hotel catering staff. Identify breakfast, lunch and break times with the hotel and reconfirm with staff once you are on site. ALWAYS take a copy of the Banquet Event Order (BEO) with you onsite to verify against the items on the table to ensure accuracy.)*		
Who is the onsite contact at the hotel/venue? *(Note their contact number.)*		
Will you be shipping material to the hotel/venue prior to the meeting? ***(Ensure that all packages are clearly identified.)***		
Will you arrive early for setup?		
Do you require extra time for tear-down?		
Do you require water and glasses on each table? *(pens and pads, etc.)*		
Will you be bringing any signage? *(If the hotel is preparing signage, ensure it has the correct spelling of your organization's name and/or the name of the meeting.)*		
Do you require a registration desk? If yes, how many chairs? *(It is handy to have a small trash can at the registration table.)*		
Do you require an extra table to display material?		
Will you be bringing any audio visual equipment? If so, clearly identify the items with your organization's name.		
Make sure if you are shipping your organization's projector, laptop and any other equipment, appropriate insurance is put on the courier package.		
Do you require audiovisual equipment from the hotel? If your meeting space is large, make sure you order a strong projector and larger screen.		
If there will be a presentation, do you require a laptop and speakers so the audio will be heard by the audience? If you will be linking to something on the Internet, make sure you arrange for Internet access with the hotel.		
Will you require Internet access for yourself and/or meeting participants? *(Let hotel know how many people will require access, as this request can be costly. Ensure you have the necessary codes.)*		
Do you require a telephone and long-distance access? *(If you are hosting a teleconference, you will need dial-in numbers, a participant code and moderator number)*		

Name of Person Attending Meeting:		
Meeting Name:		
Location:		
Date:		
Item		√
Are you bringing a laptop? *(Advise hotel you will need a power cord.)*		
How would you like the room set up? *(Head table, hollow square, boardroom, classroom, rounds? Do you require a podium with a microphone, etc.?)*		
If needed, prepare a participant list prior to the event and ensure you receive proper approval from participants to distribute the list at the meeting.		
Prepare printed materials at your office to avoid the cost of using the Business Center. *(PDF meeting packages can be used instead of printed materials where appropriate.)*		
Nametags should be placed in alphabetical order by last name and always have at least five extra blank nametags on hand. *(At our office we make nametags with First Name **Last Name**, but the last name is larger and bolded so it still works well to put in alphabetical order by Last Name.)*		
Bring a meeting packet *(A small bag of items such as packing tape, scissors, highlighters, pens, pencil, sharpies, flipchart markers, calculator, ruler, Post-it notes, clips and elastics, etc.)*		
Prepare to and from shipping labels with your organization's courier account number and communicate those needs to your hotel contact.		
Clipboard *(A clipboard is always helpful for offsite meetings.)*		

Out-of-Office Checklist

PLANNED	
Turn on temporary out-of-office voicemail message	
Turn on Outlook Out-of-Office Assistant	
Ensure dates are blocked in calendar	
Meet with your boss to review any support needs while you're away	
Meet with Admin Buddy *(Provide any details for projects she will need to handle in your absence, review procedures manual, provide her with a copy of your Typical Day Checklist and any passwords needed.)*	
Send email to team advising on dates you're away and who's your backup	
UNPLANNED	
Advise supervisor of absence	
Turn on Out-of-Office Assistant *(or provide passwords to Admin Buddy to do so)*	
Turn on temporary out-of-office voicemail message *(or provide password to Admin Buddy to do so)*	
Advise Admin Buddy of any work that needs handling in your absence. *(If it is an extended leave, Admin Buddy will need access to your Typical Day Checklist and procedures manual.)*	

(Write down any passwords your Buddy will need)

Voicemail: ________________________________

Computer: ________________________________

Outlook: _________________________________

Other: ___________________________________

This document should be kept in a locked drawer and shredded when no longer in use. Upon your return, you can change your passwords, if necessary.