



## OFF & AWAY PLANNER

In order to take time Off For Fun (“OFF”), you need to plan ahead to ensure your team is well prepared to continue the work while you’re away. Follow the steps below to truly enjoy your time OFF!

### Step 1: Look back, then plan ahead and block your time OFF.

- Take a look back at the last year – how much time were you truly OFF? (Use the calendar on the following page to highlight the days you were OFF last year.)
  - Do you want more time OFF?
  - Do you like the way your time OFF was spread throughout the year / seasons?
  - Did you enjoy the duration of your blocks of time OFF? Would you prefer to take time OFF in longer stretches or shorter blocks?
  - What was your best time OFF and why? What made it great? What didn’t work so well?
- Think about your desired time OFF for the next 12 months.
  - What does your dream vacation look like? What would it take to make it happen? Can you do a version of it sooner than later?
  - Do you have specific travel, recreation, retreat, or social plans (or desired plans)?
  - How long do you prefer to go between stretches of time OFF?
  - How long do you need or want to be OFF at a time?
- Look at your calendar for the year ahead and block off the times you want to be OFF. (Highlight them on the calendar on page 3 so you can see the comparison to the past year.) Really block those dates – mark them as “out of office” or “do not schedule” in your work and home calendars.
  - If you have a team, be sure your time OFF is identified in a place they can see. Do not allow people to schedule you for meetings or deadlines during those times without first consulting you.

### Step 2: Lay the groundwork for being OFF and away

- First, think about what a **fabulous** experience of being OFF and away would look and feel like.
  - Being OFF is only really fun if you’re actually away from the



work. So, we need to either make sure your practice can accommodate your work being on pause while you're away, or that you have a team in place to handle the work seamlessly while you're OFF, so you can be away. (If the work must go on without you, you can't really step away from it unless you have confidence it's being handled beautifully.)

- Determine whether (and to what extent) your work can be put on pause while you're away.
  - How will you identify the work that can be paused vs work that must continue?
  - How will you let people know (if needed) that the work is on pause, and when you'll pick it back up?
- For work that cannot be put on pause, assess your team to determine who can handle which types of work. (Note – you're not looking at specific projects at this point, but instead thinking about the types of things you do, and who in your firm could handle those types of work in your absence.)
  - If you don't have someone on your team who can handle certain aspects of your work (for instance, there isn't another lawyer who can handle calls from clients), or you're a solo practitioner, consider whether you have a colleague in the community who might trade off handling vacation coverage, or whether there is an outsourced provider that might be able to step in while you're out.
  - If you have a team or outsourced provider who can handle some or all of the work, think about how you could begin having them handle some of those types of items now to build trust and familiarity, so your transition to being away periodically isn't jarring to you or to them.

### **Step 3: Build your OFF & Away Playbook**

- Based on the work you did in Steps 1 + 2, build a Playbook (essentially, a checklist or how-to document) that you can deploy before any time OFF to be sure you've covered the bases and can vacation well.
  - Check out our sample playbook on pages 4-5 to see what we include in our OFF & Away Playbook.

### **Step 4: Be OFF & Away!**

- You built the plan and the playbook – now you just have to lean into them, and trust the process. Enjoy, and come back refreshed and ready to rock!



# 2023

# 2024

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JANUARY						
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FEBRUARY						
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JUNE						
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NOVEMBER						
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## SAMPLE OFF & AWAY PLAYBOOK

### Description:

We know it's important to take time Off For Fun ("OFF") and have developed this playbook and process to be sure we do it well – for the person who will be OFF and for the team who will handle the work in their absence.

### Checklist

- Check the team's "time off" calendar to ensure no one else has time off at the same time. If there is conflicting time off already on the calendar, discuss with the team to determine whether we can accommodate multiple people being out at that time.
- Book time off on the "time off" calendar and team calendars so all are aware that you will be off.
- Block your own calendar to reflect that you are unavailable.
- Inform the team of your time off in regular team meeting(s).
- Set the following calendar appointments to coordinate work in progress with the team or individuals who will handle the work while you're off.
  - **2 months ahead:**
    - If traveling internationally, notify cell/WIFI provider for any devices that will need to be used internationally.
  - **2 weeks ahead:**
    - Review work and assign a "second chair" to the projects that might overlap with your time off.
    - In team meeting, remind the team of your upcoming time off.
    - Re-check calendar to ensure you do not have appointments or events during your time off.
  - **2 days ahead:**
    - Review work and discuss any open items with the second chair.
    - Communicate with clients, opposing counsel and others as appropriate, to let them know when you are off and who will be handling the matter while you are off.
    - Set your out of office reply (use the settings so it does not begin sending until you are off). Be sure your out of office reply gives a point person for people to contact in your absence.
  - **1 day after return (re-entry):**
    - Meet with the team to catch up on what happened with your matters and projects while you were away.



- Determine how you will re-enter those matters and projects.
- Review the calendar to be sure you are included in any necessary upcoming meetings.
- **Debrief:**
  - What went well in planning for and executing the time off (so the person taking time off could really be OFF while away, and the team remaining at work was well supported too)?
  - What didn't go so well?
  - What do we need to adjust for the next time? Any updates we should make to this Playbook?

### **Useful Resources**

- To open other team members' calendars and the Time Off Calendar, follow the instructions below for your version of Outlook:
  - **Old Outlook:** Go to Calendar in your Outlook application > Open Other User's Folder, type in the person's name or "Time Off", select Calendar in the Folder Type drop-down, click Open.
  - **New Outlook:** In Outlook, Go to File > Open > Open Shared Calendar, then type the name of the calendar, and select Open.

### **Version Details**

This playbook was last updated September 1, 2022 by Whitney Harper. Updates include editing "Out of Office" reply.

### **Playbook Owner**

Whitney Harper