

If I'm unavailable

This is the plan for the person stepping in. Work it in order: section 1 is what to do right now, section 3 is the timeline after that, and each line there has a box to tick as it is handled. Sections 4 and 5 are names and places to look up when you need them.

BUSINESS

Brightline Bookkeeping

OWNER

Dana Whitfield, CPA

CONTINUITY LEAD

Maria Alvarez

BACKUP

Tom Reyes

1. Start here

A**CONTACT THIS PERSON FIRST**

Maria Alvarez, (312) 555-0147

B**DO THESE THREE THINGS**

Call Maria. Open the shared drive, Continuity folder. Email the four priority clients using the template on Day 13.

C**SPEND THE FIRST HOUR ON THIS**

Call Maria and tell her she is coordinating. Send the Day 13 message to the four priority clients. Put a note on the office line and on the shared inbox.

D**DO NOT LET THIS BE FORGOTTEN**

The payroll run on the 15th. It is scheduled in Gusto, but somebody has to approve it, and today that is only me.

4. Who can help

TEAM

Maria Alvarez, Tom Reyes

PAYROLL

Gusto support, account 44192

INSURANCE

Midland Mutual, policy BL-55218

IT

Northside IT, (312) 555-0110

BANK

First Lakeside, Ellen Park, (312) 555-0163

OUTSIDE HELP

Ruth Nakamura, CPA, (312) 555-0178,
Northside IT, (312) 555-0110, Midland Mutual,
claims line, (312) 555-0190

IF YOU'RE UNSURE WHO TO ASK

Ask Ruth Nakamura, CPA. She has reviewed our files before and knows the client base.

5. Where to find

CALENDAR

Shared Google calendar, Brightline Deadlines

CRITICAL SYSTEMS

Practice management (Karbon), Accounting software (QuickBooks Online), Business bank (First Lakeside)

FINANCIAL INFORMATION

QuickBooks Online, plus the First Lakeside portal. Statements in the shared drive.

CLIENT INFORMATION

Karbon, Clients tab. Tom keeps a printed list in the front drawer, updated the first Monday of the month.

PASSWORDS AND ACCESS

1Password, shared vault Brightline. Backup codes in the office safe.
