PREPARE FOR SETBACKS

Continuity contact sheet

Name _____ **Business** _____ **Date** _____

You will finish with
A named person who steps in when you cannot work, clear limits on what they may do, and a tested handover.

Do this first
Prepare for Setbacks, Lesson 2: What If You Cannot Work? Its worksheet lists your active jobs, urgent payments and key contacts, which your contact uses with this sheet.

1. Who steps in

Continuity contact (a trusted person who handles the essentials when you cannot, within limits you set).

Role	Name	Phone
Continuity contact		
Backup person (if the first is not available)		

2. What they may do

Tick one column for each task. Fill in the rand limits (e.g. order stock up to R3 000).

Task	May do	Must wait for me	Needs formal authority
Reply to customers and move non-urgent jobs			
Tell staff what to do each day			
Collect payments from customers			
Order stock up to R_____			
Pay urgent bills			
Sign new quotes or contracts			
Buy anything over R_____			
Speak to the bank or insurer			

WARNING
A note is not legal authority
Banks and insurers have their own rules before someone can act for you. Ask your bank about adding an authorised signatory, and get legal advice where needed.

This resource is for educational purposes only. It is not tax, legal or financial advice. Rules and requirements can differ by business type and location. Check with the relevant authority or a qualified adviser for your situation.

3. Who to call for help

Adviser	Name	Phone
Accountant or bookkeeper		
Insurer or broker		
Bank		
Lawyer (if any)		

4. Test it in 10 minutes

Ask your contact to find these without your help. Tick each one they find.

- **CHECKLIST**
  - ☐ This week's active jobs
  - ☐ The next urgent payment and its date
  - ☐ The insurance policy
  - ☐ A key supplier's phone number
  - ☐ What they may not do

Gap found and how I will fix it (e.g. could not find the insurance policy: put it in the Contracts folder)

_____

_____

Next step

Give this sheet and my Owner absence continuity checklist to _____

By when _____

When to redo this

Run the 10-minute test every 6 months and after each planned day off. Update the sheet when your contact, staff or rand limits change.

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