

Business Continuity ToolKit



*Step-by-Step Guidance to Protect Your Clients,
Your Income, and Your Business*



We've got your "what ifs" covered!

Succession Security | www.successionsecurity.com

Welcome

This toolkit is designed to help solo bookkeepers like you create a personalized plan to protect your business during unexpected disruptions. By completing this toolkit, you'll gain actionable steps to safeguard your income, support your clients, and ensure your business runs smoothly—even if you're unavailable.

Unexpected disruptions can happen to any business. Whether it's a medical emergency, family crisis, or extended recovery period, having a solid Business Continuity Plan ensures your clients are supported, your income is protected, and your business keeps running. This toolkit will guide you through creating a plan tailored to your needs.

*Life happens...
With the
right plan,
your business
doesn't have
to stop when
you do.*

At Succession Security, we understand that your business depends on you. That's why we created this resource—to empower you with tools and strategies that will give you peace of mind and ensure your clients are taken care of, no matter what life throws your way.

With over 30 years of collective accounting experience, our team has helped solo bookkeepers like you secure their businesses and maintain client trust through proactive planning and support.

Let's get started on building a stronger, more resilient future for your business!

Step 1: Identify Risks

What situations could temporarily prevent you from working? Think about medical emergencies, family crises, or other disruptions.

What are the top three risks to your business continuity?

How could these risks impact your clients or income?

Notes

Use this space to jot down additional thoughts, ideas, or reflections about the risks you identified.

[illegible]

Step 2: Prioritize Critical Tasks

Not all tasks are equally important. Use this checklist to identify the tasks that must be completed to keep your business running during a disruption.

Ask yourself:

Which tasks must be done to keep your business running?

What would happen if these tasks were delayed?

Priority

1

Priority

2

Priority

3

Notes

Write down any additional thoughts or details about your critical tasks.

[illegible]

Step 3: Automate and Delegate

Think about tasks you can automate or delegate. Write down one task to automate and one person or service to call on for help in an emergency.

What tasks could you automate today?

Who could you rely on for help in an emergency?

Notes

Use this space to brainstorm additional automation or delegation strategies.

This image shows a single sheet of white paper with horizontal blue or grey ruling lines. The lines are evenly spaced and run across the width of the page. There is no handwriting or other markings on the paper.

Step 4: Ensure Client Communication

Effective communication is key to maintaining client trust during a disruption.

What Your Clients Need to Know:

- What happened (briefly and professionally).
- How it affects them.
- Who they can contact in the meantime.

Business Continuity Client Communication Template:

Dear [Client's Name],

I hope this message finds you well. I wanted to inform you that due to an unexpected medical emergency, I will be unavailable until [return date].

To ensure your needs are met during this time, [backup contact name] will be handling urgent matters, including [specific tasks such as invoicing, payroll, or client inquiries]. They are fully prepared to assist and can be reached at [backup contact email] or [backup contact phone number].

Best regards,
[Your Full Name]

Draft your own message:

Notes

Write down any additional thoughts about your client communication plan.

[illegible]

Step 5: Regularly Update Your Plan

A Business Continuity Plan is only effective if it's up to date. Set a recurring reminder to review your plan every three months. Use the checklist below to guide your review process.

Next Review Date: _____

- 1

Is all the client contact information current?

☐
- 2

Have I added new clients or projects that need to be included?

☐
- 3

Have I switched to new tools or software?

☐
- 4

Reflect on recent changes in your business.

☐
- 5

Brief your backup contact on current workflows.

☐
- 6

Does my backup contact still have the skills and availability to step in?

☐

Completed Business Continuity Plan

Key Risks

Critical Tasks

Automation Systems

Client Communication Plan

Backup Contact Information

Plan Review Schedule:

[illegible]

About Succession Security

Why Succession Security Was Started

Succession Security was founded by Christine Siegenthaler, a seasoned bookkeeper who recognized a critical gap in the accounting and bookkeeping industry: solo practitioners often lack contingency plans to protect their businesses during unexpected health events. Christine's mission was to empower solo bookkeepers and accountants with tools to secure their business future and maintain client trust, even in times of crisis.

How Succession Security Helps

Succession Security provides protective membership services designed specifically for solo bookkeepers and accountants. These services ensure business continuity during unforeseen circumstances, such as medical emergencies or extended absences. Members gain access to a comprehensive Protection Plan tailored to their unique needs, offering peace of mind for both practitioners and their clients.



We've got your "what ifs" covered!

We're here to safeguard your clients, your income, and your business during the unexpected.

Membership Benefits:

As a member of Succession Security, you'll gain:

- A **customized and regularly updated Business Continuity Plan**.
- **Emergency client service support** within 3 business days.
- Up to **90 days of temporary client service coverage**.
- Assistance with selling your practice.
- A **seal of approval** to market your commitment to client protection.

Membership ensures your clients and business are protected, no matter what happens.

Next Steps



Your Business's Future is Secure

With **Succession Security**, you'll never have to worry about what happens if you're unavailable. We're **your partner** in protecting your business, your clients, and your income.

Take the next step today—your business's future depends on it.

Exclusive Offer for New Members

Join Succession Security and mention **"toolkit"** to receive **15% off your first 3 months of membership.**

Take advantage of this limited-time offer to protect your business and clients today..



Why You Should Act Now

Emergencies don't wait until you're ready. By becoming a member today, you'll:

- Avoid the stress of planning for emergencies alone.
- Gain confidence knowing your clients will always be supported.
- Have access to a team of experts who can step in when you need them most.

Don't wait until it's too late—secure your business's future today.

How to Get Started

Visit our website:
successionsecurity.com

Email us:
[membership@
successionsecurity.com](mailto:membership@successionsecurity.com)

Call us:
877-694-1232

Schedule a **free consultation** with our founder, Christine Siegenthaler, to discuss your needs.