



Business Continuity Plan Checklist

Your resilience	Responsibility of	By when
Wellbeing		
Advise team on how to manage their wellbeing and provide them with relevant links and phone numbers.		
Family first		
Form plan with family for responding to shutdowns and working from home.		
Make plan for checking in with family members who need to self-isolate.		
Personal budget		
Review personal budget.		
Update personal budget.		
Personal asset planning		
Review and update insurances.		
Create or review and update Will.		
Create or review and update Memorandum of Wishes.		



Nominate and record Powers of Attorney.		
Safely store important documents and information and ensure these can be found.		

Supporting your team	Responsibility of	By when
Covid-19 Prevention and Response Policy		
Ensure Covid-19 Prevention and Response Policy is created and includes best practice for your team.		
Share policy with your team.		
Review and update policy as required.		
Updating your team and ongoing communication.		
Determine the process for regularly updating your team.		
Set up Loom to record short update videos.		
Determine the process for the team to ask questions.		
Continuity of work		
Changes to roles		
Review current organisational structure.		



Identifies roles which may change or be disestablished.		
Update organisational structure, roles, key responsibilities and tasks.		
Updating goals and KPIs		
Review goals and KPIs for roles which will continue.		
Set new goals and targets to reflect updated responsibilities and the impact the pandemic will have on sales and revenue.		
Working from home		
Determine requirements for team to work from home.		
Arrange technology and software for team to work from home.		
Develop working from home policy.		
Flexibility of working hours		
Review working hours and determine the working hours available.		
Discuss use of leave with team.		
Obtain legal and/or HR advice if hours need to be changed or reduced.		
Negotiate with team members to reduce their working hours.		
Update relevant Employment Agreements and sign off.		
Financial support		
Review government financial support available to assist with leave payments or wage subsidies.		
Assist team members to apply for relevant assistance.		
Work-related travel and events		
Review upcoming work events and cancel or postpone all events.		
Develop processes for delivering events online.		



Restructuring and potential redundancies		
Review all Employment Agreements.		
If restructuring and redundancies are required, contact lawyer and/or HR specialist for advice.		

Supporting and retaining customers	Responsibility of	By when
Covid-19 Prevention and Response Policy		
Ensure Covid-19 Prevention and Response Policy is created and includes steps you're taking to respond to the impact.		
Share relevant parts of the policy with your customers.		
Review and update policy as required, updating customers each time.		
Changes to your services		
Review current product or service offering and determine changes required.		
Review and update processes to reflect changes.		
Terms of Trade		
Review and update Terms of Trade.		
Update Terms of Trade.		



Send updated Terms of Trade to customers, highlighting key changes.		
Offer incentives to retain customers		
Identify incentives to offer to help retain customers.		
Share incentives with customers via email and social media.		
Communicating with key customers		
Send communications to customers to update on changes to products or services or their delivery.		

Working with suppliers	Responsibility of	By when
Payment arrangements		
Review and negotiate payment terms.		
Purchasing policies		
Ordering of stock		
Contact supplier to discuss supply chain stability.		



Confirm the supplier's contingency plans if deliveries can't be made or supplies can't be obtained.		
Determine whether stock needs to be re-ordered now.		
Review and adjust minimum re-ordering levels.		
Return of stock		
Review supplier contracts in regard to the return of stock.		
Contact supplier to discuss return of stock if necessary.		
Determine which stock should be discounted.		
Contracts		
Review supplier contracts and ask for amendments if required. Seek legal advice.		
Review other key contracts with lessors, vehicles and equipment and seek to renegotiate terms if required. Seek legal advice.		

Your business	Responsibility of	By when
Cashflow Forecast and Cashflow Management		
Prepare updated Cashflow Forecast.		
Accounts receivable process		
Review and update accounts receivable process.		
Follow up outstanding payments and request payment.		



Accounts payable process		
Review and update accounts payable process.		
Contact suppliers to improve payment terms.		
Inventory process		
Conduct stocktake.		
Review and update inventory process.		
Debt / capital structure		
Review debt structure and contact bank and other financiers to discuss options.		
Review drawings from business and adjust future drawings.		
Determine whether a capital injection is required.		
Overhead expenses		
Review overhead expenses and negotiate better terms with utility suppliers.		
Gross profit margin		
Review processes and implement strategies to reduce re-work, errors and wastage.		
Review the margins across departments and product or service lines and determine if low margin products or services should be discontinued.		
Discuss process improvement strategies and increasing efficiency with team.		
Sales levels		
Identify key areas to focus on to grow sales.		
Unused assets and equipment		
Determine whether there are any assets or equipment that could be sold.		
Asset purchases		



Identify essential asset purchases and arrange lease or loan.		

Bank assistance	Responsibility of	By when
Contact bank and other financiers to discuss options.		

Insurance	Responsibility of	By when
Review current insurance policies.		
Contact insurance broker to discuss any potential cover for Covid-19 related claims as well as ensuring the business has adequate cover for all other risks.		

Tax department support		
Review support offered by tax department.		
Contact accountant to discuss best options for tax relief.		



Government support package	Responsibility of	By when
Review government support package and determine what the business qualifies for.		
Apply for relevant government support		
Review new support packages after each government announcement.		

Additional notes	Responsibility of	By when

Follow up actions not documented in the Business Continuity Plan	Responsibility of	By when
Send completed or draft Business Continuity Plan to accountant.		



Project work / follow up	Who	By when	Fee quoted (if applicable)

Three things of value

Next online meeting with accountant:	
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