

Business Continuity Instructions Scorecard							Your Name						Date Now	Goal Date	
Mindsets	1	2	3	4	5	6	7	8	9	10	11	12	Score Now	Goal Score	
1	Overview	Your family would not have a clue of what to do if you were unable to continue your role in the business.	You have anticipated some issues that may arise if you're not around & you intend to get them in writing.		Your Business Continuity Instructions lay out the actions to take, people to contact & roles to fill if you don't cross the finish line.			You review, update & communicate your Business Continuity Instructions to your family, key people & Advisors on an annual basis.							
2	Trusted Advisors	Your Advisors are not very familiar with each other, nor with your survivors.	You think you have the right Advisors in place to advise your family if you died or became incapacitated.		You have assembled a good Advisor Team and some of them are aware of your business continuity intentions.			You have shared your Business Continuity Instructions document with your Advisors who also use it as a basis for their annual roundtable discussions.							
3	First Contacts & Actions	You don't know who should do what if you tipped over today.	Your family knows who to call to start putting together a game plan.		Your family knows who to contact & what steps to take to continue your business if you tipped over today.			Your annual "Dress Rehearsal" has created a familiar roadmap for your family & Advisors to follow in the event of your early death &/or incapacity.							
4	Existing Arrangements	You have not established the appropriate agreements & documents your survivors may need to continue your business.	Your agreements & documents need to be dusted off as it has been years since they were implemented or last reviewed.		You have inventoried your relevant documents listing implementation dates, review dates, location & who has copies of what.			Every 3 years you have an audit of relevant personal & business agreements, plans & beneficiary arrangements.							
5	Disposition of Business	Your survivors would be starting from scratch figuring out what to do with your business if you don't make it to the finish line.	You have an idea of what you would like your survivors to do with your business, but it's not in writing.		Your survivors know the best way you want your business transferred.			Your Business Continuity Instructions outline your preferred exit path, business valuation & chosen successor.							
6	Use of Insurance Proceeds	Your survivors hope there is sufficient coverage for business & personal financial security.	You have insurance & think it will do the job you want it to do for your business & family.		Your life insurance portfolio will leave your company with liquidity, efficiently transfer ownership & allow your family to maintain their lifestyle.			You have specific instructions of what you would like your survivors to do with your personal, business & trust owned life insurance proceeds.							
7	Management Responsibility	You believe you are irreplaceable.	Your next in line management team will need assistance from your Trusted Advisors.		You have a list of people to fill specific positions if/when you die or become incapacitated.			Your replacement's responsibilities are outlined in the President's Job Description.							
8	Customers, Vendors & Key People	You hope your customers, vendors & key people stick around if you don't make it to the finish line.	You want a plan to retain the important customers, vendors & key people if you were unable to continue your role in the business.		Your customers, vendors & key people know you have a Business Continuity game plan in case you don't make it to the finish line.			Your key people will stay with your company & know of the customers & vendors who should be handled with special care, & why.							
Your Total Score															

The **Business Continuity Instructions** document is a non-binding, written guide for an owner's family & advisors to explain how everyone should address personal & business issues that arise from the owner's unplanned departure.

This scorecard will help the owner, family, key people & advisors prioritize action steps to protect the company and survivors in the event the owner is unable to continue their role.

Instructions

For each mindset in the left column, read through the four statements and give yourself a score of 1 to 12 based on where your own mindset falls on the spectrum. Put each mindset's score in the "Score Now" column at the right and then add them up.

Next, think ahead twelve months and identify the score you would like to reach by your goal date. Write these in the "Goal Score" column and add them up .

When you compare the two scores you can see where opportunity already exists and identify areas for improvement. Everyone will find themselves somewhere on this scorecard.

Awareness builds momentum and momentum builds confidence to transition visions of future possibilities into reality.

Owners and Advisors...use this scorecard as a tool to shape the conversations , improve the score and keep moving forward!

Good luck! If I may help, I welcome the opportunity



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