

The Step-Away Checklist

Get your business ready to run without you for a week, so the time away can be real time away.

Clients and team

- ☐ Tell clients my away dates and who to contact.
- ☐ Reschedule or hand off appointments and sessions.
- ☐ Set an auto reply and a voicemail message.
- ☐ Choose one person for urgent matters and agree on what counts as urgent.

Systems

- ☐ List the tasks that must happen every week while I am away.
- ☐ Write or record short how-to notes for each task.
- ☐ Schedule invoices, payments and social posts ahead of time.
- ☐ Give my backup access through a password manager, never in a message.

Money

- ☐ Confirm bills and payroll are scheduled.
- ☐ Set a spending limit my backup can approve without asking me.

Me

- ☐ Decide on a check-in window, or none at all.
- ☐ Remove work apps from my phone for the week.
- ☐ Plan a light first day back.

The one thing most likely to fall apart while I am away, and my plan for it

My backup person, and how they will reach me for something truly urgent

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