



Toolkit Template

Identification of Key Employees, Key Functions, and Backups

Objective: This template has been developed to assist the business principals in thinking about each of their functions, defining the critical activities they do that must continue if they were on leave, ill, or incapacitated in any way. Once the principals and their critical functions have been defined, a backup for each function must be defined. This backup may be an existing staff member who can take on that responsibility with training, or may require a temporary professional. In the latter case, the relevant skillset must be defined. For instance in the case of a single or small attorney practice, the need for appropriate licensing is required but so is experience in the particular branch of law as the incapacitated principal.

- Key Employee 1
 - Critical Function 1:
 - Assigned Backup Staff Member and Training Needed
 - Professional Contractor and Skillset required
 - Critical Function 2:
 - Assigned Backup Staff Member and Training Needed
 - Professional Contractor and Skillset required
 - Critical Function 3:
 - Assigned Backup Staff Member and Training Needed
 - Professional Contractor and Skillset required
- Key Employee 2
 - Critical Function 1:
 - Assigned Backup Staff Member and Training Needed
 - Professional Contractor and Skillset required
 - Critical Function 2:
 - Assigned Backup Staff Member and Training Needed
 - Professional Contractor and Skillset required
 - Critical Function 3:
 - Assigned Backup Staff Member and Training Needed
 - Professional Contractor and Skillset required