

FREE BUSINESS HOLIDAY READINESS CHECKLIST

Set Up for Autopilot Success

Please print it if that helps

1. Let your clients know you're taking a break

Send a quick email or message to your regulars. Let them know when you'll be away, who to contact if they need something urgent, and when you'll be back. Most people appreciate the heads up. ☐

2. Set up your out of office

Pop a simple out of office reply on your emails and phone. Keep it friendly and clear. If you want, mention when you'll be checking messages (if at all). ☐

3. Automate your invoices and payment reminders

Make sure any regular invoices are scheduled to go out while you're away. Set up automatic payment reminders so you're not chasing money from a sun lounger. ☐

4. Use Monzo pots (or your bank's version) to set aside money for tax and bills

Work out what percentage of each payment you need to save for tax, wages, rent, utilities, or loan repayments. Set up pots or spaces in your banking app and automate transfers as soon as money comes in. That way, you won't get caught short when the bills land. ☐

5. Delegate what you can

If you've got a team, make sure everyone knows what's expected while you're away. Share any passwords, instructions, or emergency contacts they might need. If you're a one-person band, consider asking a trusted friend or fellow business owner to keep an eye on things. ☐

6. Schedule your social posts and updates

Line up a few posts or updates to go out while you're away. This keeps your business visible and lets people know you're still around, just taking a well-earned break. ☐

7. Double check your diary for when you get back

Make sure you've got a clear idea of what's waiting for you when you return. Book in any follow-up calls or jobs now, so you're not scrambling on your first day back. ☐

8. Back up your files and data

It's always worth making sure your important files are saved somewhere safe before you go. Cloud storage or an external hard drive will do the trick. ☐

9. Give yourself permission to switch off

This is the big one. Remind yourself that you've earned this break. The world won't end if you don't reply straight away. Your business will be better for it. ☐

Need a hand getting your business holiday-ready?
We're always here for a chat—no jargon, no judgement,
just straight-talking support.

Message us or book a free 30-minute
Financial Fitness Call here.

