

## Mobilization Preparation Checklist

Check	Task	Notes
<b>Primary Business Concerns</b>		
	Decide whether to suspend or sustain operations	
	Designate key manager	
	Take inventory	
<b>Updating Your Business</b>		
	Invest in training for yourself and your key managers	
<b>Legal and Administrative Concerns</b>		
	Notify your legal and financial advisers about your deployment or potential of future mobilization	
	Assign power of attorney	
	Review Uniformed Services Employment and Reemployment Rights Act (USERRA) as needed	
	Review leases	
	Review Servicemembers Civil Relief Act	
	Review insurance status	
	Address the following:	
	Warranties/Guarantees: product, service, contract	
	Contracts and agreements: assignment, completion, non-complete, confidentiality, nondisclosure, franchise	
	Contingent legal problems: litigation, disputes, judgments	
	Strategic alliance agreements and obligations	
	Labor union agreements	
	Meet with employees to discuss future company objectives	
	Thoroughly review your business and identify problem areas	
	Review a list of assets and perform a physical inventory	
<b>Taxes</b>		
	Notify IRS of your deployment status	
	Identify any unresolved tax issues	
	Check IRS for updated tax information	

## Mobilization Preparation Checklist - Page 2

Check	Task	Notes
<b>Other Financial Considerations</b>		
	Review the financial portions of your updated business plan (See administrative issues)	
	Determine financial needs prior to mobilization	
	Contact your lenders	
	Inform and request assistance from vendors and creditors	
	Loan deferral or interest rate restructuring as needed	
	Update listing in Dun & Bradstreet	
	Review credit report	
	Review and update all signature authorities	
	Review existing business plan or create a business plan	
	Check credit rating	
	Review Military Reservist Economic Injury Disaster Loan (MREIDL) if needed	
<b>Healthcare Considerations</b>		
	Determine eligibility for military transitional healthcare	
	Update your and your family's status in the Defense Enrollment Eligibility Referral System (DEERS)	
	Review civilian insurance policy and decide whether to discontinue or change coverage	
	Change plans as appropriate and ensure proper enrollment/disenrollment dates	
	Explore veterans service organizations and small business association memberships for insurance plans	
<b>Marketing</b>		
	Determine the needs of your current customers	
	Reanalyze your company's competitive advantages in order to update your market strategy	
	Determine the best way to satisfy your customers' needs in the current market	
	List all current and prospective customers	
	Summarize competitors' products	

## Mobilization Preparation Checklist - Page 3

Check	Task	Notes
	Research your competitors' strengths and weaknesses	
	Obtain copies of your competitors' annual reports	
	Examine the strength of the current market	
	If applicable, notify your customers that your business will be temporarily closing	
	Obtain and compare competitors' annual reports for the financial condition of businesses, market share, and insight into future projects	
	Conduct market research to determine current market strength for your business sector	
	List business in CCR (Central Contractor Registration system)	

From *Balancing Business and Deployment*, U.S. Small Business Administration