



THE PLAYBOOK

The Cover

Documenting your role so the business runs without you. For the person who cannot take a holiday, and the leader who cannot afford for them to leave.

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The holiday nobody can take

Ask an experienced executive assistant about their last real holiday and watch what happens to their face.

Not the days off that were booked and then worked through. Not the week away spent checking a phone every two hours because a single unanswered message would turn into a problem nobody else could solve. An actual absence, where the work continued and nobody needed anything.

A great many people in this profession cannot remember one. The reason is almost never that leave was refused. It is that **the job exists entirely inside one person's head**, and everyone involved has quietly agreed not to think about what that means.

This is usually described as a personal problem, something about boundaries or an inability to switch off. It is not. It is an operational failure with two victims, and the second one is the business.

Because the same thing that stops you taking a holiday also means the company is one resignation, one illness or one family emergency away from losing a body of knowledge nobody wrote down. The person most trusted with everything becomes the single largest point of failure, and the trust is precisely what created the risk.

This playbook fixes both problems with the same work. It is deliberately not about offboarding or security, which are different subjects. It is about continuity: what has to exist so that your absence is an inconvenience rather than an event.

Indispensable is a ceiling, not a compliment

There is a version of this job that feels like security. You are the only one who knows how the reporting is built, where the vendor logins live, what the founder actually means when they say they will look at it later. Nobody can replace you because nobody could reconstruct what you hold.

It feels safe. It is the most effective career trap in this profession, and it is worth being direct about why.

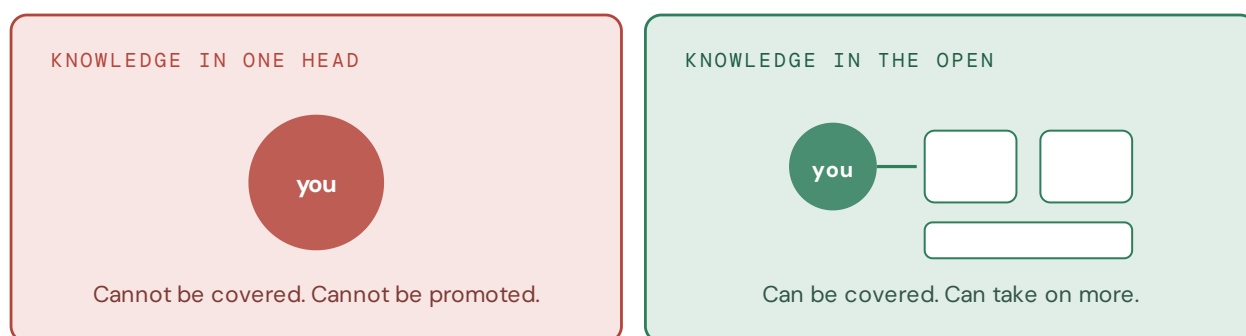


Figure: the same person, two different ceilings

The mechanism is simple. **Nobody gets promoted out of a job that only they can do.** Every expansion of your role requires somebody to absorb what you currently hold, and if what you hold cannot be transferred, the organisation's rational choice is to leave you exactly where you are. Your irreplaceability is experienced by everyone else as a constraint.

It is also fragile in a way that feels like the opposite. A person whose value rests on being the only one who knows cannot be ill, cannot be unavailable, and cannot ever be caught not knowing. That is not job security. It is a long, quiet obligation to never falter.

The alternative is not making yourself replaceable. It is making yourself **expandable: transferring what you hold so that you have room to hold something larger.**

What actually needs writing down

The reason most documentation projects fail is that they begin with an attempt to write down everything. That is a project measured in weeks, it competes with real work, and it loses.

You do not need everything. You need the things that would break, and those are identifiable in about half an hour.

CONSEQUENCE IF IT IS MISSED

Write a one-line note

Rare, but serious. Where it lives, who to call.

Write this first

Frequent and serious. The whole risk lives here.

Leave it

Rare and survivable. Documenting costs more.

Write it, then automate it

Frequent, low stakes. Prime candidate to remove.

HOW OFTEN IT HAPPENS

Figure: sort by frequency and consequence, and write only two of the four boxes

Run it against one ordinary month rather than from memory. List what you did, place each item in a box, and write the top-right box first. In most roles that is between five and nine procedures, not fifty.

The bottom-left box is the one people cannot bring themselves to skip, and skipping it is correct. If something happens twice a year and somebody could work it out, documenting it costs more than the disruption it prevents.

The role handbook

One document, not a folder of scattered files. Somebody covering for you should be able to open a single thing and orient themselves in ten minutes. Six sections, and it is shorter than you expect.

01 The week

What happens on which day, and roughly when. The Monday brief, the Friday close, the standing meetings, the recurring reports. The shape of the job before any of the detail.

02 The people

Who matters, what they usually want, and the two or three you should never leave waiting. Include the ones with no formal seniority who can nonetheless stop everything.

03 The procedures

The five to nine things from chapter two, each written to be followed rather than admired. Linked, not pasted in, so the handbook stays readable.

04 The access map

Every system, who holds the credentials, and how a stand-in gets in. Not the passwords themselves. Chapter five covers why that distinction matters.

05 The judgment notes

The unwritten rules. What the leader always wants a brief for, what they never want to be asked, what to say yes to on their behalf. This section is the actual value.

06 The escalation path

What is genuinely urgent, who decides in your absence, and whose problem each category of thing becomes.

Section five is the one that separates a handbook from a filing cabinet. Anyone can document a process. The valuable part is the accumulated judgment about how this particular person and this particular business actually work, and it exists nowhere else.

Writing procedures people actually use

Most written procedures fail the moment somebody tries to follow them, because they were written by an expert describing what they do rather than by a stranger recording what they needed.

Write it while doing it, not afterwards. Memory smooths over exactly the steps that trip people up. Do the task with the document open and capture each action as you take it, including the small corrections you make without noticing.

Say why, not only what. "Send the report to the client on Thursday" tells a stand-in nothing about what to do when Thursday is a holiday. "Send it before their Friday leadership meeting, which is why Thursday" lets them work it out. Every procedure should carry enough reasoning to survive a situation you did not anticipate.

State the trigger and the finish. When does this start, and how do you know it is done and correct. Most procedures describe the middle and omit both ends, which are the parts a newcomer actually lacks.

Name the failure modes. What usually goes wrong here, and what to do about it. Two lines. This is the most valuable content in any procedure and it is almost always missing, because the author has stopped experiencing those problems as problems.

THE TEST

Hand it to somebody who does not do your job and ask them to follow it without asking you anything. Every question they have to ask is a defect in the document, not a deficiency in them. Fix it and repeat. Two rounds is usually enough.

Keep them short and keep them in the same place. A procedure that takes twenty minutes to write and one minute to find beats a beautiful one nobody can locate under pressure.

Access, credentials and the keys problem

This is where continuity planning most often goes wrong, in both directions. Either nobody can get in while you are away, or the solution is a spreadsheet of passwords in somebody's inbox, which trades one problem for a considerably worse one.

The correct structure separates two things that get conflated: knowing what exists, and being able to open it.

The access map is documentation and it should be complete. Every system the role touches, what it is for, whose account it runs under, what it costs, and who the vendor contact is. This contains no secrets and it belongs in the handbook, because half the panic during an unplanned absence is simply not knowing what exists.

Credentials are not documentation and should never be written down. They belong in a shared password manager with a named emergency contact who can be granted access when needed. The mechanism should already exist and have been tested, rather than being improvised during the week it is required.

Shared logins are the failure underneath most of this. An account four people use cannot be handed over, revoked, or audited, and it is the thing that makes both coverage and offboarding messy. Where individual accounts are possible, use them.

Nobody should need your phone to run your job. If they do, you have not built cover, you have built a dependency with extra steps.

One practical note that catches people out: two-factor authentication tied to a personal device is the most common single point of failure in a small business. Move it to something the company controls before you need to test it.

The coverage plan

Documentation tells someone how. A coverage plan tells them whether it is theirs to do. Without it, a well-documented role still stalls, because everybody assumes somebody else is handling it.

WHAT	WHO COVERS	OR	WAITS?
Monday brief and Friday close	Ana	template ready	no
Client escalations	Founder	direct	no
Invoice run	Finance	runs 3rd	no
Vendor renewals	nobody	none due	yes, and that is fine

Figure: every recurring thing gets an owner or an explicit decision that it waits

The fourth column is the one that makes this honest. **Some things should simply wait**, and saying so in advance converts a fortnight of low-grade anxiety into a decision somebody already made. Not everything needs covering, and pretending otherwise is how coverage plans become fiction.

Set expectations outward too. A short note before you go, telling the people who normally come to you who to contact and what will pause, prevents most of the messages that would otherwise reach you. The absence of that note is why holidays get interrupted.

And agree one genuine emergency channel with one named person, with a definition of emergency attached. Everyone sleeps better, including you, and it is almost never used.

The dry run

A coverage plan that has never been tested is a document, not a capability. The test is cheap and nobody does it.

Take one day, unannounced to yourself in advance. Not a holiday. A normal working day where you do the documented handover, then genuinely do not touch it. No monitoring the inbox from a distance, no quietly fixing something at nine at night, no answering the one message because it was easier than explaining.

Then write down what happened. What did somebody have to ask about, and which procedure should have answered it. What waited that should not have. What broke, and whether it broke because of a missing document or a missing decision.

Every one of those is a defect with an obvious repair, and finding them on a Tuesday you chose is enormously better than finding them during a family emergency you did not.

WHAT USUALLY BREAKS FIRST

In my experience it is rarely the complicated work. It is a login nobody could get into, a person who did not know they were the contact, and one recurring item that turned out to have no owner at all because it had always simply been done. All three are fixable in an afternoon once you know.

Do it twice a year, and expand it to a week once the single day passes cleanly. **A role that survives a planned absence will survive an unplanned one,** which is the only version of this that actually protects anybody.

Why this is the leader's risk, not yours

If you run a business, the honest framing of this chapter is uncomfortable. The person you trust most is very probably your largest operational risk, and that is a consequence of how you have used them rather than anything they have done.

The pattern is consistent. A capable assistant or operator absorbs whatever is not working. Because they absorb it well, more arrives. Nobody writes any of it down, because writing it down would take time away from absorbing the next thing. Within two years an enormous amount of how the business functions exists only in one person's working memory, and everyone has stopped noticing.

Then that person gets a better offer, or unwell, or simply exhausted. What follows is not a staffing gap. It is a period of weeks during which nobody knows how several things are done, and the departing person is answering questions long after they have gone, if they are willing to.

Three things you can do, and they are all cheap.

Make documentation a stated part of the role, with time protected for it, rather than something to fit around the work. If it is not scheduled it will not happen, and its absence is invisible until the day it is catastrophic.

Insist on the dry run. Not as a test of the person, but as a test of the business. Frame it that way and it will actually be done.

And make them take the holiday. An assistant who cannot be absent is not a sign of dedication. It is a defect report about your business, delivered quietly.

Build it before you need it

The uncomfortable thing about continuity work is that its value is only ever demonstrated at the worst possible moment, and by then it is too late to start.

But the work itself is modest. Five to nine procedures rather than fifty. One handbook with six sections. An access map that names what exists without writing down any secrets. A coverage table where some things are explicitly allowed to wait. And one ordinary Tuesday, twice a year, when you find out the truth.

That is perhaps two afternoons to build and a morning a year to maintain, and it buys three things at once.

It buys the business a role that survives the person holding it. It buys the leader the ability to lose an employee without losing a capability. And it buys you the thing this playbook opened with: an actual holiday, and a career that is not permanently capped by being the only one who knows.

Start with the one thing that would break first. You already know what it is. You thought of it in chapter two and hoped it would not come up again.

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