

Recovery Plan Testing

Adam Quilty, CBCP, Testing Manager, Agility Recovery Solutions



For Audio:

- Listen through PC speakers
- Dial **773-945-1011**, use access code **376-087-396**

- Testing misconceptions.
- Reasons to test.
- What to test?
- Suggested approaches.
- Building a team.
- Learning from results.

Today's Agenda

July 27, 2010

For Audio:

- Listen through PC speakers
- Dial 773-945-1011, use access code 281-118-941



Pass/Fail exam of the people or plan

Validation of backup data

Reading through the plan

One-time *project*



Common Misconceptions

PREPARE
MY
BUSINESS.org

U.S. Small Business Administration
SBA
Your Small Business Resource

 Agility Recovery

- Compliance
- Customer demands
- Validate and improve plan: reduce recovery time and COST
- Increase employee and community confidence
- Set realistic expectations with participants
- Practice makes perfect



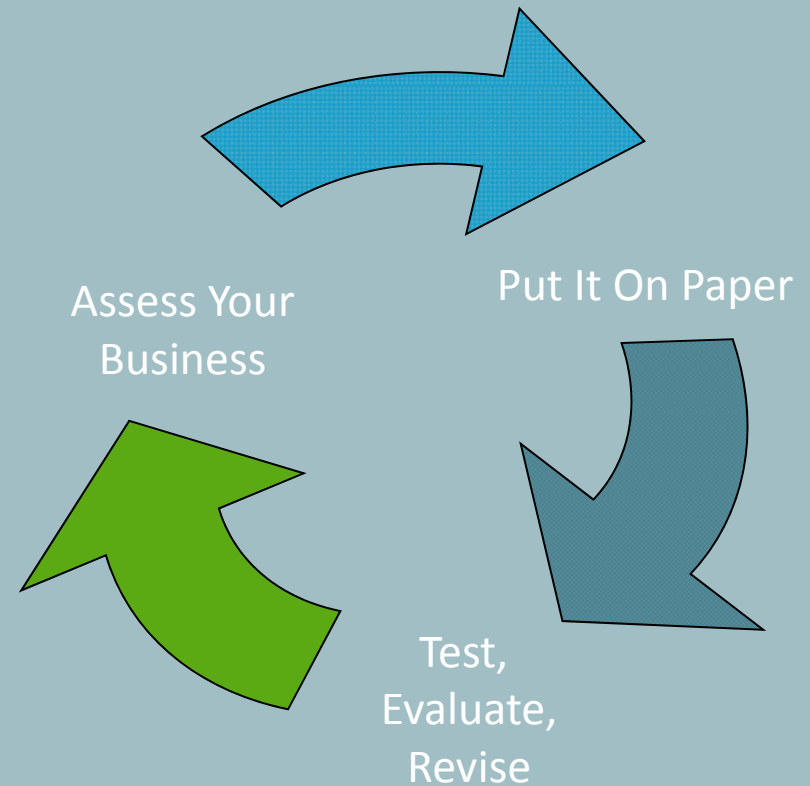
What does a good test accomplish?

PREPARE
MY
BUSINESS.org

U.S. Small Business Administration
SBA
Your Small Business Resource

 Agility Recovery

- Do an annual test and then update the plan.
- Make sure to re-train employees when making changes to the plan.
- Publish test results as addenda to your plan so your test program can evolve and grow.



Planning Lifecycle

PREPARE
MY
BUSINESS.org

U.S. Small Business Administration
SBA
Your Small Business Resource

 Agility Recovery

- Simpler vs. More Complex

- Table-top vs. Hands-On
- IT focus vs. Business focus
- Backup vs. Live Data
- Internal vs. Supply Chain



High-Level Approach

PREPARE
MY
BUSINESS emp

U.S. Small Business Administration
SBA
Your Small Business Resource

 **Agility Recovery**

Focus on functions that are:

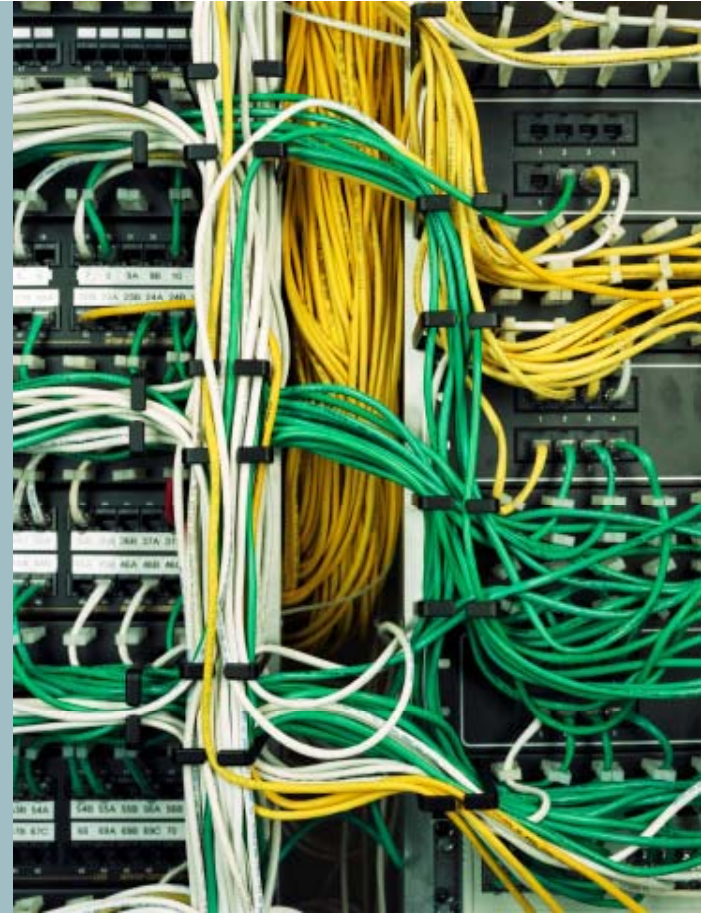
- Critical
- Weak or unreliable

Get input from participants on what they hope to learn

Get an expert outside opinion

Common Elements:

- Local Servers
- Phones – inbound/outbound
- Supply Chain
- Workflow – manual processes
- Emergency Communications



Detailed Scope

PREPARE
MY
BUSINESS emp

U.S. Small Business Administration
SBA
Your Small Business Resource

A Agility Recovery

- Business Continuity Plan
- People- Employees & Community
- Building- Current office(s) & recovery sites
- Power
- Connectivity- Telephony & Internet
- Technology- Hardware, software, & support



Test All Elements Over Time

PREPARE
MY
BUSINESS

U.S. Small Business Administration
SBA
Your Small Business Resource

A Agility Recovery

- Drill for relevant threat(s)
- Plan ahead for area evacuations
- Hold managers responsible
- Vary hazards presented
- Practice and time office lock-up
- Request Feedback



Evacuation Drilling

PREPARE
MY
BUSINESS

U.S. Small Business Administration
SBA
Your Small Business Resource

A Agility Recovery

If you can reach your people you can create solutions

- **Store your complete plan online**
 - Resource needs for recovery
 - Internal communication strategy
 - Messaging service to email/text/voice
 - Upload critical files and templates
 - Requires Internet (have hard-copies too)

- **Challenge assumptions**
 - Whatever your plan says, make sure it works
 - Backup if plan A fails to reach everyone (alternate numbers, physical meeting place)
 - Regular training to set expectations
 - Public relations

Communication Plan Testing

- Power Failure
- Phone Failure
- Internet/Network Failure



Utility Failure Testing

PREPARE
MY
BUSINESS^{emp}

U.S. Small Business Administration
SBA
Your Small Business Resource

 Agility Recovery

Primary Goal: Restore 3 critical servers from backup media

- Which are critical? Email, database, customer mgmt system
- Restore method? Tape, disk, online, image, virtual machine

Secondary Goal: Validate network and Internet access

- For which files/applications do I need to confirm access?
- Are the speed and reliability acceptable for use in recovery?

Tertiary Goals

- Inbound/Outbound Phone calls with home office
- Restore workstation/PC software
- Printing, scanning, faxing
- Identify workflow changes

Sample Scope

Take notes during the exercise

- What was the task or issue?
- When was it started/identified?
- Was it resolved? How?

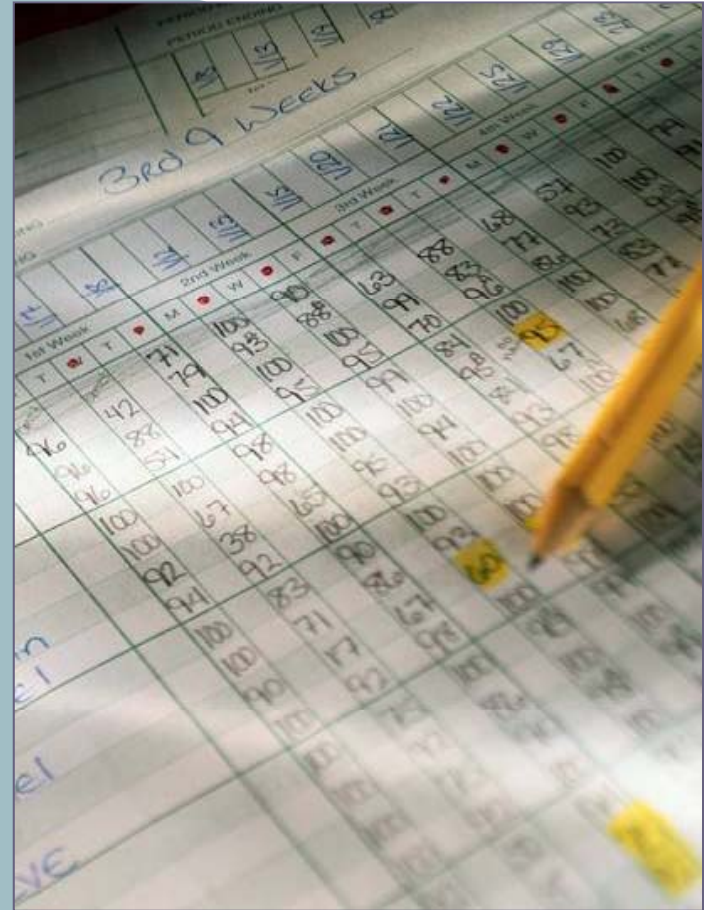
Review the findings with participants

- As test is completed
- Again after notes are compiled

Assign responsibilities for open items

Update and distribute written plan

Notes for consideration on next test



Assessing the Results

PREPARE
MY
BUSINESS.org

U.S. Small Business Administration
SBA
Your Small Business Resource

 Agility Recovery

You need to test your plan

Build business continuity testing into the budget and your company culture

Many ways to test, so be creative

Use available testing experience and resources

Identify goals to ensure *valid* results

Success means improving your Plan and ability to recover from disaster



Conclusion

PREPARE
MY
BUSINESS emp

U.S. Small Business Administration
SBA
Your Small Business Resource

 Agility Recovery

Questions?

Submit questions using the Q & A function on the screen.

Upcoming Preparedness Events:

www.preparemybusiness.org to Register:

August 24 – Webinar - Understanding Disaster Assistance Funding with the SBA

September is National Preparedness Month! Find out more at

www.ready.gov

