



| BCP Project Phase | Action Items | Date for Completion |
|--------------------------|--|---------------------|
| Project Initiation | 1. Identify key personnel for BC Planning Team | |
| | 2. Familiarize key managers and participants with the planning process and resource requirements | |
| | 3. Define terms, objectives, assumptions to be used in Global Decisions | |
| | 4. Provide roadmap of the project with milestones | |
| | 5. Attend PLANet training sessions; training may be attended by the entire recovery team or by primary plan administrator who then trains others | |
| | 6. Develop policy statement and distribute to employees | |
| Manage Data Dictionaries | 1. Review and discuss available dictionaries for imports (Core Components, Logistics, Resources, People) | |
| | 2. Review, discuss, construct imports from other data sources to implement into PLANet | |
| | 3. Import or manually enter data into appropriate Dictionary | |
| Administrative Tasks | 1. Create user accounts | |
| | 2. Create and manage plans (Professional License Only) | |
| | 3. Customize screens (Professional License Only) | |
| Making Global Decisions | 1. Review and discuss employees authorized to declare a disaster (Global, Branch, Department, Information Services) | |
| | 2. Complete criteria for declaring a disaster | |
| | 3. Complete Plan Administrator information | |
| | 4. Set plan details (Objectives, Strategies, Scope, Assumptions) | |
| Risk Analysis | 1. Review Risk Assessment | |
| | 2. Identify threats to the organization; add and/or delete threats as needed | |
| | 3. Assess probability, speed of onset, estimated duration, and impact of each threat | |
| | 4. Eliminate threats, if possible | |
| | 5. Identify effective controls to reduce risks | |
| Business Impact Analysis | 1. Review and discuss Recovery Processes from library (Located in Build Plan) | |
| | 2. Assign appropriate Recovery Processes to be used for BIA | |
| | 3. Determination of mission-critical information systems hardware, software and infrastructure should be considered | |
| | 4. Enter data | |
| | 5. Analyze data and verify results | |
| | 6. Present findings | |
| Build Plan | 1. Review and discuss any additional Recovery Processes not added for the BIA (Define Recovery Processes from Library) | |
| | 2. Design location recovery matrices (Add & Modify Recovery Resources) | |
| | 3. Assign vendor information (Add & Modify Recovery Resources) | |
| | 4. Assign Recovery Resources (equipment, software, telecom, vital records, supplies) | |
| | 5. Discuss and review employee attributes | |
| | 6. Add employees to PLANet | |

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| Build Plan (con't) | 7. Build Recovery Teams | |
| | 8. Build Employee Call Chain | |
| | 9. Assign Recovery Team roles | |
| | 10. Meet with Recovery Team leaders to discuss the approach for developing customized recovery policies and procedures specific to each department | |
| | 11. Recovery processes included in the PLANet library should be reviewed and modified in accordance with the guidelines set forth in the previous step (Modify processes and Assignment to Processes) | |
| | 12. Determination of mission critical information systems hardware, software and infrastructure should be included in the review process | |
| | 13. Review and approve recovery processes | |
| Awareness & Training | 1. Identify audience for both awareness level programs and detailed training programs | |
| | 2. Develop BCP training and awareness programs - programs should include: | |
| | a. Components of plan | |
| | b. Review of policy statement | |
| | c. Identification of team members | |
| | d. Where BCP info can be obtained | |
| | e. When is the BCP tested | |
| | f. How is the BCP activated and executed | |
| | 3. Determine media for programs: | |
| | a. Videos/film | |
| | b. Newsletters | |
| | c. Posters | |
| | d. Memos | |
| e. Promotional items | | |
| f. Brown bag lunch meetings | | |
| Plan Testing | 1. Develop testing approach to include test planning, test execution, post test review, self-assessment | |
| | 2. Business areas, based upon criticality and risk assessment, should develop a functional testing schedule (Test and Approve Plan) | |
| | 3. Create test plans based upon functional testing schedule; tests should increase in complexity over time | |
| | 4. Conduct tests and document results | |
| Plan Maintenance | 1. Verify team responsibilities as they relate to plan maintenance | |
| | 2. Identify potential sources of change | |
| | 3. Develop maintenance strategy to minimize "gaps" between the plan and daily operations | |
| | 4. Maintain plan as a "living" document | |
| Plan Approval and Distribution | 1. Submit plan to Board of Directors for approval on an annual basis (Test and Approve Plan) | |
| | 2. Establish procedures for plan distribution and document control | |
| | 3. Print and distribute plan | |

About SunGard Availability Services

SunGard Availability Services provides disaster recovery, managed IT, information availability consulting services and business continuity management software to over 9,000 customers globally.

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