

# 7 keys to unlocking a modern Business Continuity Management approach



CONSIDERATIONS CHECKLIST



## Executive summary

Are you still using home-grown, Microsoft Word or Excel to document and manage your business continuity program or disaster recovery procedures? We hear that many BC and Disaster recovery professionals still feel daunted with the prospect of adoption of a software platform — management buy-in and extensive user training can pose significant challenges. Hence deciding to get up and running fast with a do-it-yourself approach might seem like the right solution. There is a downfall to this approach — will you find your data when the auditors come knocking or in event of an actual incident? How will you manage complex dependencies? In the past, there was a trade-off — do you make upfront investment of time and effort to get started right or do you simply delay the pain and deal with the consequences of DIY approach — mainly poor maintenance, error-prone change processes and lack of security?

The good news is that you no longer need to make the trade-off described above. With next generation Business Continuity software like Assurance<sup>CM</sup> from Sungard Availability Services — we address the initial challenges and help teams sustain and maintain a thriving resilience program. It's about getting your entire organization up and running quickly and participating in business continuity with a simple and intuitive tool. At the same time, you have a solution that scales and simply works with the rate of change in today's business and IT environments.

Last but not least, business stakeholders are asking continuity leaders to step beyond compliance fulfillment. Ultimately, the solution you pick needs to support your BC program strategy and execution. As you think about your choices for tools and solutions, here are fundamental program design aspects to account for:

- Employee or departmental engagement and degree of decentralization of your program — we know that capturing the insights or wisdom of the crowd vs. a selected few experts contributes to a more accurate picture of risks and threats. You need a simple solution that everyone can embrace.
- Insights at time of event or disaster — Sungard AS user group survey cites that 75% of plans are never used “as-is”. Is your program agile and automated to capture both internal changes and external events as they unfold?
- Program effectiveness: Providing an update to audit with a documented plan in Word or Excel is just one aspect of a program. But today's BC programs are living entities and need to be embedded in ongoing operations of the enterprise. Does your tool provide up-to-the-minute status on program health? Can you answer a simple question — will recovery work when needed?



# 1

## Transitioning a continuity program from a traditional word processing product to Assurance<sup>CM</sup> is easy

### We call it Facebook easy.

The biggest challenge in maintaining plans is getting planners to make accurate updates.

- The import function will enable you to copy any current recovery information so it can be used in your plans.
- Planners are only responsible for their domain of data — not the entire plan! The simple pick-list navigation of processes, tasks, people, assets as well as pre-built dictionaries makes it easy for planners to simply select their relevant data to create and update plans.
- The plan templates in Assurance<sup>CM</sup> generate plan visualizations which look like Word documents — a familiar format for most people. In addition, planners can edit and update directly from the plan visualization for quick changes.



# 2

## Traditional plans lack the functionality of a relational database

The constant change required in continuity management can be easily managed with the relational database. Plan templates allow the program leaders to make a change once, and it will be applied everywhere necessary.

- Regular updates like people (employees, key customers and vendors), application, hardware, and other resource information can be done globally, changing all plans where that information is used. It's not necessary to change each plan individually.
- With all plans and continuity information stored in a single relational database, continuity resource requirements can be automatically calculated — whether one office, one floor, or an entire business campus suffers a disruption. It also enables continuity leaders to have a snapshot of their entire program including teams, equipment, locations, and documents.
- A traditional planning tool can't support the “rollup” of plan data, because information is located in separate documents. It's the relational capability that can provide details on any particular plan or provide the ability to quickly consolidate information across all plans, or specific locations, resources, processes, tasks, or teams.
- Similarly — at time of event or test it is necessary to capture only the relevant information needed, (i.e. we need to be able to slice and dice data quickly). For example — give me the list of employees, their supervisors, and home contact information for only those on 25th floor of building 650? In-line reporting offered by Assurance<sup>CM</sup> allows BC program leaders and crisis managers to work together to generate actionable insight at time of event. This would simply not be possible even across a handful of Word documents.



# 3

## Traditional planning tools do not provide built-in planning intelligence or activity workflow

Plan templates are guided user interfaces that lead users through building and maintaining plans. Here are a few advantages they present:

- Templates provide a unique “window of responsibility”, presenting only what is expected of the individual logged in to build or maintain their assigned plan.
- Instead of beginning with a lone flashing cursor in a word-processing document, you’ll begin with the guided interface to lead you toward your ultimate goal — an effective continuity plan based on expert methodology.
- Assurance<sup>CM</sup> comes equipped with several templates that support plan building for crisis management, process, application, or hardware recovery. With these, you can immediately begin your planning activities. Alternatively, you can customize templates or build new ones for your vertical or specific compliance mandates) to suit your company’s continuity policies, goals, and planning decisions.
- Assurance<sup>CM</sup> comes configured with advanced program workflow engine — For example, the dashboard offers a simple status view and due dates of all plans. There is a notification flow — including scheduled e-mails to planners who need reminders to update their plans and to stakeholders who need to approve plans.



# 4

## Sungard AS Assurance<sup>CM</sup> is the only planning solution with advanced and automated situational awareness capabilities.

Change management is the Achilles heel of any enterprise system — be it employee data or IT assets. In today's fast paced world of cloud, virtualization, employee-sourced apps and mobility, the IT environment is always changing. Manually updating plans using batch imports is an error-prone process requiring specialized coding and data management skills. In addition, your so-called trusted partners in IT are themselves struggling with change management. Only Assurance<sup>CM</sup> ships with an embedded cloud middleware platform PaaS called Assurance<sup>CM</sup> Connect to instantly connect with over 80 enterprise databases — Workday, Salesforce Chatter, Gmail, and SAP to name a few. Such data automation eliminates the manual intervention, ensures data accuracy at all times and accelerates the update process.

BC leaders are also realizing that internal enterprise data isn't enough to respond at time of event or disaster. Most traditional tooling addresses two separate constituents — incident and crisis teams who monitor external events — weather, traffic, earthquakes, and civic unrest vs. a BC team who manages the overall program. The challenge with such an approach is confusion, information overload and lack of coordination at a time of crisis. Assurance<sup>CM</sup> Situational Awareness with Google Maps is the only solution that merges the world of planning and crisis management into a single view. Now BC leaders can view external impacts on their enterprise locations within their plan dashboards in real-time.



# 5

## Traditional planning tools do not provide simple yet robust security for a continuity program

The traditional approach to planning makes security more difficult to enforce. Plans are likely to be larger and cover more area, resulting in more people having to have access to the plans and their information. Assurance<sup>CM</sup> provides a powerful, integrated security system to help you secure information and effectively control access to critical, confidential information.

- The security features and access control mechanisms that come with Assurance<sup>CM</sup> can be set up to manage access to data, program functions, and tasks — all in one simple administration interface. Simple drop downs guide the degree of access and functions by user role in the BC program. .
- Assurance<sup>CM</sup> security can prevent alteration or deletion of information from within the planning system, eliminating an inherent risk encountered using traditional planning tools.



# 6

## Despite its low cost, a homegrown tool provides little ROI

Using a word processing tool to manage your plans is not cost free; chances are your people will spend hours doing work that can be accomplished in a fraction of the time with Assurance<sup>CM</sup>. When an employee is assigned a role in several different plans (not unusual at all) each of those plans will have to be changed one by one. And you run a greater chance of introducing errors into those plans. In this era of constant change in the IT environment and business processes — the paper plans are outdated the minute they are completed. Tools like word processing, spreadsheet, or network file management programs are not designed for business continuity, and are not capable of delivering the necessary support to continuity planners.

The administrative and manual burden on traditional or DIY approaches isn't the optimal allocation of your team's expertise and time. Your program deserves actionable risk insight — freeing up the team to spend their time on risk assessment, collaborating with business units, testing and training is a win-win for everyone in the organization.



# 7

## Traditional planning tools do not support agile and ad-hoc reporting needed by today's business stakeholders.

Custom reporting as well as canned reports in traditional tools can be very expensive to maintain and update. In addition, BC leaders need to continuously maintain staff with specialized reporting and database skills, a challenge in today's competitive IT market. The biggest challenge with static reporting is that it is impossible to develop a report for every possible scenario or question. Assurance<sup>CM</sup> turns reporting on its head — with intuitive in-line reporting and chart widgets. It simply takes a quick drag and drop from

100s of fields, dictionaries and plans to answer any question. This ad-hoc query capability is agile yet robust. You get program status and health checks across multiple plans but it is equally important to get a quick answer to questions at time of test or incident? “How many critical applications or processes will be impacted due to flood on the first floor of our data center?” It's ultimately about providing the confidence that the program will be effective at all levels – different stakeholders and different situations.



## Conclusion

Your Business Continuity program deserves more, simply because the risk to your organization is too high. The quick do-it-yourself won't scale, flow or capture the necessary steps required in a robust business continuity program.

Businesses that build real insights, engage with stakeholders and leverage a purpose-built solution, such as Assurance<sup>CM</sup>, gain the right level of confidence. Confidence that their business can recover quickly and seamlessly at time of incident.

Sungard AS' business is business continuity. We will continue our three decade long commitment to deliver the best availability software, solutions and services. Sungard AS software support goes well beyond being available for questions or planning advice 24 hours per day, 7 days per week, 365 days per year — they also act as advocates for our customers, relaying enhancement requests to our product managers and developers. In addition, with their background in continuity planning, many times they can offer their knowledge about how to use our software to your best advantage.

### Additional reading



[Sungard AS Assurance:  
Business Continuity Software](#)

#### About Sungard Availability Services

Sungard Availability Services provides managed IT services, information availability consulting services, business continuity management software, and disaster recovery services.

To learn more, visit [www.sungardas.com](http://www.sungardas.com) or call 1-800-468-7483 or outside the U.S. +1-610-768-4120

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