

4 critical considerations for business continuity planners



CONSIDERATIONS CHECKLIST



Executive Summary

Incidents of business disruption are by no means rare today. According to a [Disaster Recovery Journal Global Disaster Recovery Preparedness Online Survey](#), 73 percent of respondents admitted to having some sort of major disruption to their business operations in the past five years.¹ The most common causes were extreme weather, natural disasters, power outages, IT failures, flood, or fire.

Disaster recovery/business continuity plans are critical to protect the safety and well-being of customers and employees, and to safeguard shareholder investments and brand reputation. Yet despite the risks, many companies do not have plans in place. Those that do often utilize a do-it-yourself approach — usually using Microsoft Office tools — that may not effectively address today's fast-paced, technology-driven business environment.

This checklist examines four critical considerations for determining which approach to disaster recovery is best for ensuring a company is prepared to meet today's evolving needs.

¹ [“The State Of Disaster Recovery Preparedness.”](#) Disaster Recovery Journal, January 2011



Business leaders can no longer consider disaster recovery/ business continuity plans expensive insurance policies from rare events. A modern planning approach is mandatory, and successful solutions must avoid the hazards of past approaches.

Many businesses manage plans utilizing static internal tools. The survey by the Disaster Recovery Journal also found that 67 percent of respondents manage plans using Word or Excel, and only 14 percent update them continuously. Today, business and IT environments change constantly, which means that plans created in Word or Excel are almost instantaneously out-of-date.

Some businesses are required to have disaster recovery/ business continuity plans in place by regulation. Since the 1980s, business continuity management has seen numerous shifts in regulatory pressures, from data center recovery and Y2K, to terrorism and state-sponsored cyber threats. Built in another computing era for another purpose, these systems are often reactive, closed, and difficult to use. Plans created using these systems are often designed to meet regulatory tests only. While compliance is important, plans also need to actually work in a time of need. Businesses should therefore aim to move beyond doing the bare minimum needed for compliance and focus on more than just what is required to avoid fines.

Four critical considerations for determining the best approach

There are several key considerations for determining whether a do-it-yourself approach or a software-based approach is best when it comes to disaster recovery:

- Is it easy enough for anyone to use?
- Does data need to be accessible anytime, anywhere?
- Can you accurately maintain plans?
- Can you utilize in-line reporting?



1

Is it easy enough for anyone to use?

Most planning software is designed for experienced planners. But trained planners usually represent a small group within an organization. A solution can only be effective when it has widespread adoption across the organization. Therefore, the solution has to drive full stakeholder engagement at every level of the organization, at every stage of the planning cycle.

While word processing, spreadsheet, or network file management programs are easy enough for anyone to use, they are not designed for business continuity, and are not capable of delivering the necessary support to continuity planners.

The best solution, therefore, should enable business continuity and disaster recovery planners to capture valuable input from less technical “novice planners” and engage the entire company to find the vulnerabilities that matter. Better information, gathered from “novice planners” results in plans that truly guide the next best action. Usability, therefore, is critical. A solution that is easy enough for the novice planner to use helps promote widespread engagement and adoption.



2

Does data need to be accessible anytime, anywhere?

Anytime-anywhere access to business-critical applications during a crisis or incident is critical. An effective solution should enable mobile support from a broad range of devices, including Mac and PC laptops, iPad, iPhone, Android, Windows Mobile, BlackBerry, etc. It should also be platform and browser independent.

A word processing document, a spreadsheet, or a network file management program does not provide this type of anytime-anywhere accessibility.



3

Can you accurately maintain plans?

Effective plans are alive and interconnected. They cannot be created or maintained in a vacuum. To ensure an accurate plan, a company should engage a variety of stakeholders across the organization. Any time there is an update to the production IT environment, for example, plans should be updated to reflect those changes so that appropriate measures can be taken in the recovery environment. Whether or not multiple users can make and track changes is a critical consideration.

Plans created using Word templates essentially become islands. Global changes such as updating a header or footer must be made individually in each plan. Using a word processing-based approach, chances are that employees

will spend hours doing work that can be accomplished in a fraction of the time they can using disaster recovery software. When an employee is assigned a role in several different plans (which is not unusual), each of those plans will have to be changed one by one. This means you run a greater chance of introducing errors into those plans. Using a software-based approach ensures the company can make global changes efficiently and frees employees up to spend time testing plans, training, and working on other initiatives.



4

Can you utilize in-line reporting?

Can a variety of reports be produced and analyzed easily? Intuitive, in-line reporting is a must-have. A software-based approach facilitates easy generation of dashboards and reports within an hour of introduction to the planning solution. Do-it-yourself tools either do not offer such tools or offer them only in a limited capacity.

A company that chooses a software-based approach should be wary, however, of overly complex reporting “tools” that require formal training.



A changing focus

A new era is emerging from business continuity's changing environment. The shift is changing the focus from "plans" to "outcomes." Today's business leaders demand broader participation in the planning process and increased confidence that plans will lead to better outcomes. At the same time, lawmakers are mandating ever-more regulations, creating ever-increasing compliance pressures. Progressive business continuity executives accept these responsibilities despite a higher frequency of unplanned threats and incidents.

These changes signal the need for a new business continuity approach. Next generation planning demands more engagement, more responsiveness, higher confidence, and greater flexibility. The entire company, even non-technical stakeholders, must be engaged to find the vulnerabilities that matter, so that they can guide the next best action(s).

Plans are living entities, not documents. Businesses therefore need to focus less on static plans derived from Microsoft Word documents. Rather than write a plan once and walk away, today's companies should expect change and accommodate it often, and then take what they learn back into the planning cycle and share it across the company.

Ultimately, today's solutions must be visual, logical, and smart enough to anticipate hazards. They must also provide an intuitive user interface and automation capabilities to allow companies to easily maintain and share the plan... which signals that many companies may need to migrate away from traditional Microsoft Word or Excel as their planning platform of choice.



Conclusion

About Sungard Availability Services Assurance^{CM}

Sungard AS has 30 years' of experience and domain expertise, providing customers unparalleled security and peace of mind. With Assurance, Sungard AS ushers in a new era of business continuity assurance, extending beyond compliance to deliver what matters most: better outcomes and increased confidence.

In building Sungard AS Assurance^{CM}, Sungard AS placed the customer at the center of the product development process — hundreds of customers from every industry participated in designing the solution. Most software is designed for experienced planners, but Sungard AS understands that different types of users have different needs. Sungard AS Assurance was therefore designed to be intuitive, allowing everything from plan creation to threat mitigation to be completed with minimal training.

As a pure Software-as-a-Service solution, Sungard AS Assurance is unfettered by traditional IT constraints and accessible from any device, anywhere, anytime. Sungard AS Assurance guides the next-best action under any load with up-to-the-minute insights, leveraging the wisdom of the crowd around current, crucial, yet highly secure information.

For more information please visit our website at:

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

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