Intro to Business Continuity Planning

First Step: Identify the Players

Once a team is given the charter to begin the planning process, the **investigation phase** begins. It helps to take a journalistic approach to the task and begin with the basic questions: the who, what, when, where, how, and why or so what?

One of the bigger challenges is uncovering the "latent" or contextual information everyone knows, but isn't written down anywhere. Imagine you are a reporter out to get the "story" of how the organization functions.

The natural first step is map out the "**who**."

Organizations have a hierarchy, and a pattern used to create teams or "**business units**" that are used to support one or more processes. This goes back to the Mongols, who used the decimal system to create a nice and orderly horde that managed to take over much of the civilized world back in the day. Today, we use a variation of this system to meet our need for communication and control.

While the Mongols taught us that chaos can be fun, you probably won't stay in business for long without an organization chart. When a disaster strikes, disorder creates the biggest challenge to recovery. The org chart is one of the first things people will look for.

The planning process can't move forward until the team identifies who is on which team, what their **roles** are, and how many people serve in each role. Managers and HR staff can provide copies of organization charts, role or job descriptions, and the names and numbers of the people who serve in each role.

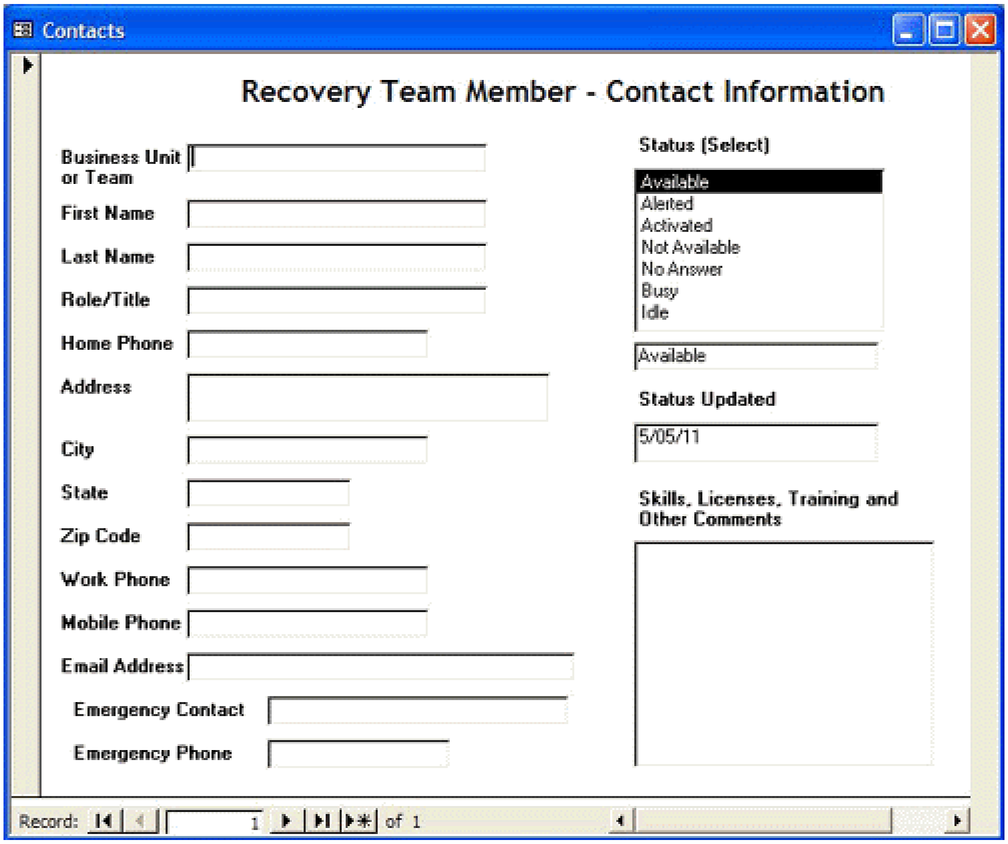
As you assemble a list of the people in the organization, ask two key questions:

1. At time of event, will this person **play a role** in a recovery effort?
2. Can this person help **draft or validate** recovery plans?

With these questions in mind, the team can generate a list of **process experts** for each business unit and advise them of their part in the planning process. Not every person will participate in the planning effort, and not everyone will play an active role in a recovery effort. Every person in the organization, however, must be accounted for at time of event.

Next, the team can identify all who will participate in any recovery effort, request their **contact information**, and use it to populate a Recovery Contact Database.

Refer to the Access DB linked below for an example of a Recovery Contact Database:



Recovery Leads should maintain copies of the Recovery Contact Database in the office, at home, and in a secure, trusted location.

Finally, the team can create a "**master list**" of all people associated with the organization to support efforts to **account for everyone at time of event**. This list should be delivered to Human Resources, which is tasked with updating the content, and distributing it to Recovery Leads on a quarterly basis.