

Participant's Name

# Business Continuity Planning EXECUTIVE WORKSHOP

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# Family Plan

The most important plan necessary in any Business Continuity Program starts with each employee's family. In nearly all business interruption cases, there is some impact to the family. Where interruptions are caused by regional issues, the impact can be much greater. However, other issues may very well impact the focus of resources if family impact is evident.

The following represents key areas in which each employee should address. This knowledge can then be rolled up into a company repository.

Primary Contact Information

Address \_\_\_\_\_

City, State Zip \_\_\_\_\_

Primary Phone \_\_\_\_\_

Mobile Phone \_\_\_\_\_

Home E-mail Address \_\_\_\_\_

Text Message/SMS Address \_\_\_\_\_

Secondary Contact Information (if vacating the premises, where is the primary destination?)

Name \_\_\_\_\_

Relationship \_\_\_\_\_

Address \_\_\_\_\_

City, State, Zip \_\_\_\_\_

Primary Phone \_\_\_\_\_

Mobile Phone \_\_\_\_\_

E-mail Address \_\_\_\_\_

Text Message/SMS Address \_\_\_\_\_

Tertiary Contact Information (if not secondary)

Name \_\_\_\_\_

Relationship \_\_\_\_\_

Address \_\_\_\_\_

City, State, Zip \_\_\_\_\_

Primary Phone \_\_\_\_\_

Mobile Phone \_\_\_\_\_

E-mail Address \_\_\_\_\_

Text Message/SMS Address \_\_\_\_\_

Is sufficient cash on hand (in house)?     YES     NO

Personal property you must have:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

# Internal Company Plan

*Business Continuity Plans take many levels of complexity. The items to the right provide a basic beginning framework for getting started. Key business decisions are noted to the right.*

- What are the most likely sources of business interruption for your company?

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- Quick judgment call: how long of an outage can you tolerate?

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- Who is responsible/authorized for engaging the plan?

Name \_\_\_\_\_

Title \_\_\_\_\_

Address \_\_\_\_\_

City, State, Zip \_\_\_\_\_

Primary Phone \_\_\_\_\_

Mobile Phone \_\_\_\_\_

E-mail Address \_\_\_\_\_

Text Message/SMS Address \_\_\_\_\_

- Are individual employee plans in place?  YES  NO

- Does the company have all employee contact info (primary, secondary, tertiary)?

YES  NO

- Is there an HR policy for period of time employees are "allowed" to be out of touch?

YES (Duration of time: \_\_\_\_\_)  NO

- Is data backup off site?  YES  NO

If yes, where is it? \_\_\_\_\_

\_\_\_\_\_

How to contact? \_\_\_\_\_

\_\_\_\_\_

*Internal Company Plan Checklist continued on page 4...*

# Internal Company Plan

*Internal Company Plan Checklist  
continued from page 3...*

- What key business processes have the greatest impact on the business if unavailable?
  - E-mail
  - R&D
  - Marketing/PR
  - IT Services
  - Finance and Treasury
  - Other \_\_\_\_\_
  - Other \_\_\_\_\_
  - Other \_\_\_\_\_
  - Production
  - Sales/Sales Administration
  - Customer Service
  - Web Site/E-commerce
  - Accounting and Reporting

- Based on the question above, consider the Financial and Operational impact over a period of time.
  - Impact on customer services
  - Loss of customers
  - Loss of revenue
  - Potential additional costs of recovery
  - Exposure to penalty clauses
  - Exposure to possible litigation
  - Loss of key information
  - Negative financial impact

- Top three actions from above analysis:
  1. \_\_\_\_\_  
\_\_\_\_\_
  2. \_\_\_\_\_  
\_\_\_\_\_
  3. \_\_\_\_\_  
\_\_\_\_\_

# Key Customer/Supplier Plan

The purpose of this plan component is to understand two primary items. First, in the event the interruption is sourced within your company, who has the greatest impact. Second, in the event the interruption was caused by a key customer and/or supplier, are you aware of their plans and how do you both help them and/or protect yourself.

## Who are your key customers?

Customer Name

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

BCB in place?

YES  NO  Don't Know  
 YES  NO  Don't Know  
 YES  NO  Don't Know  
 YES  NO  Don't Know  
 YES  NO  Don't Know

## Who are your key suppliers?

Supplier Name

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

BCB in place?

YES  NO  Don't Know  
 YES  NO  Don't Know  
 YES  NO  Don't Know  
 YES  NO  Don't Know  
 YES  NO  Don't Know

IT Services Company

\_\_\_\_\_

YES  NO

Telephone Company

\_\_\_\_\_

YES  NO

ISP Provider

\_\_\_\_\_

YES  NO

- Ensure key contact information is in place for each identified contact above. This should include both work and home information on the most critical players. In addition, you should share this same information with these business partners. The key to success is keeping the overall communication chain in place regardless of the source of interruption.