

IMPLEMENT BUSINESS CONTINUITY AND RECOVERY PLAN CHECKLIST

When you're dealing with a crisis, stress is par for the course—but you can significantly decrease your business's recovery period if you have a business continuity plan in place.

Follow this checklist to help guide you in assessing the impact of a crisis and creating your own continuity plan.

STEP 1 ▶ Assess the Situation

Gather information on the crisis or disaster.

- ▶ What is happening (e.g., natural disaster, health crisis)?
- ▶ Where is it happening?
 - Is it localized to a single area or widespread?
- ▶ Can you estimate the duration of the disruption?
 - Do you anticipate a short-term (under one month) or long-term impact to your operations?
- ▶ Who are your key sources of information (e.g., government, public health officials, social media, news sources)?

Monitor the situation and assess the need to activate your business continuity plan.

- ▶ What are the impacts to your business units?
- ▶ How many of your business functions are impacted?
- ▶ Should you enact all recovery strategies or just some?
- ▶ Who needs to give approval to activate the plan? What other preparations do you need to make before activation?

STEP 2 ▶ Activate Your Plan

Get in touch with any teams that have a role to play in implementing your plan.

- ▶ Speak to HR, emergency response teams, communications departments, and anyone else responsible for coordination.

Prioritize which activities need to happen first.

- ▶ What is your schedule?
- ▶ What are the critical resources you'll need for each activity (e.g., infrastructure, IT)?

Prepare all responsible staff.

- ▶ Distribute business continuity and recovery plan.
- ▶ Review plan and answer questions. Make adjustments based on employee feedback.
- ▶ Make sure everyone understands their roles and responsibilities.
- ▶ Schedule time slots for progress reports and updates.

STEP 3 ▶ Monitor Progress

Receive frequent status reports and schedule meetings with employees.

Keep detailed notes of progress, updates, and concerns.

Pay attention to what's happening around you to anticipate needs and help where possible.

Report any changes in situation.

- ▶ As the crisis evolves, you may have to adjust your priorities and resource requirements.
- ▶ Escalate issues as needed, and be flexible in adjusting your strategy.

Remain available to answer questions and clarify roles and responsibilities.

STEP 4 ▶ Deactivate your business continuity plan when appropriate

Determine whether your plan should be discontinued gradually or at once.

- ▶ If gradually, which activities can be stopped or transitioned back to business as usual?

Clearly notify all parties of these changes.

Evaluate how you did with a post-event review.

- ▶ What did you do well? What could be improved?
- ▶ Did you learn any lessons? Incorporate these into your existing business plans to be better prepared next time. Share your findings with your stakeholders.