

Like any other process that keeps a business functioning, updating the disaster recovery plan (DRP) needs to become an organizational habit. This document is designed to help you review your DRP to ensure you'll be able to recover quickly when disaster strikes.

We'll assume that your plan is written and contact lists are included, and that your group has identified the information it wants to save, coordinated with the building operations or facility management team to work with outside contractors and vendors, and identified alternate locations to resume work. You can walk your management team through the entire show, from making backups to business resumption.

Preparation/data maintenance

The goal of any DRP is to identify and save the data and files your department will need in order to get back on its feet.

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| <ul style="list-style-type: none"> Perform backups. | Backups includes electronic and paper files as well as vital publications. This may dovetail with your organization's document retention plan, so the two tasks could be combined. Don't duplicate what you don't need. |
| <ul style="list-style-type: none"> Move backups offsite. | An offsite depository needs to be created and maintained as part of the DRP; at specified intervals, the old backup materials need to be replaced. |
| <ul style="list-style-type: none"> Update the DRP as needed. | The DRP must reflect changes in procedures, personnel, and the organization. This should be done annually, quarterly, or monthly depending on how frequently change happens. |
| <ul style="list-style-type: none"> Document the backups for existing systems. | Determine who makes the backups for existing systems; who holds them to offsite delivery; who is responsible for retrieval following a disaster; and who keeps track of the media and the naming conventions. |
| <ul style="list-style-type: none"> Document the backups for new systems. | Document the systems and processes that were created since the last regular update, especially any documentation for operation, data sources and vendors, and information easily lost if not recorded at the time of inception. |
| <ul style="list-style-type: none"> Maintain contact lists. | Every top-level manager should know where their directors are and how to reach them quickly and how to reach everyone in the department if they're not in the office. |
| <ul style="list-style-type: none"> Maintain phone contact systems. | Until an alternate worksite is operational or until the original workplace is back in order, virtually all communications will be by phone, especially for managers. Any changes to phone conferencing systems, login procedures, beeper and pager numbers, or PDA addresses need to be captured and put into the DRP at update time. |

Disaster response

The goal is to get the organization back on its feet as soon as possible. The first priority is your people. The second is the plan to get everything working.

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| <ul style="list-style-type: none"> If disaster happens after hours, facilities management alerts the department managers. | Your building operations department has, or should have, contingency plans for hazardous material spills, fire, weather-related disasters, etc. They will inform managers, who must decide—based on the severity of the disaster—whether to have everyone take a day off or to execute the DRP. |
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| <ul style="list-style-type: none">• If it's during the workday, security evacuates the building. | Building operations should have distributed descriptions of "safe" locations outside the building for people to gather and be counted. Plan on having nothing but your backups in another location and a copy of the DRP where you can reach it quickly. |
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Notification

Make everyone aware that the DRP is activated.

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| <ul style="list-style-type: none">• Management alerts staff, begins recovery. | Management instructs your staff to refer to the DRP and start the process of putting the business back together. |
| <ul style="list-style-type: none">• Staff gets initial assessment of losses. | What was lost? What was damaged? Are backups needed? Was there work-in-progress that can be resumed or restarted, or must it be abandoned? |
| <ul style="list-style-type: none">• Staff reports losses to leadership. | The information from step two goes up one rung of the ladder and the manager makes the call for his or her team. At this point, a manager may know whether getting the business going will be a matter of minutes or days. |
| <ul style="list-style-type: none">• Leadership re-establishes lines of communication. | Top managers let their teams know they have the information and will activate the DRP for operations that need restoration. Although it's rare that an entire organization is affected, getting the word out that leadership is addressing the problem is indispensable to employee morale and health of the organization. |

Mobilization

The business has to get moving to be effective. Mobilization prepares employees for getting back to work.

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| <ul style="list-style-type: none">• Staff prepares temporary work areas. | Through prior arrangement, workers set up in their own homes, a corner of the building, or in another department. Phone lines, computers, and office fixtures will likely need to be moved. |
| <ul style="list-style-type: none">• Staff retrieves backups. | This is where people find out how much work they're going to need to do to get back to where they were before the disaster. This is also when you tend to find any defects with the recovery plans of your vendors. Document problems found here for the next time. |

- Staff reports to management on when they can get back to work.

Deliver honest projections. If recovery to the pre-disaster state is going to take more time or resources than anticipated, remind everyone to record all their needs for later updating of the DRP. Fault-finding wastes time and is a distraction. All you are interested in now is how soon they can take up where they left off.

Regrouping

The affected staffs and managers have their backups, a place to work, and a clear understanding of what they need to do to get back to pre-disaster functionality.

- Staff restores function.

Work processes need to be put back into operation, especially those for works-in-progress or under deadline that must be completed to realize revenue.

- Staff replaces any non-backed-up information as needed.

The key phrase is “as needed.” If the work at hand has a deadline or is already sold, it’s crucial to restore that information. Recover or re-create less pressing information later.

- Leadership resupplies staff.

Things like paper, disks, power strips, forms, coffee, are provided. Some organizations give this task to a manager acting as a Disaster Recovery Procurement Officer, who gathers all requests from the organization and places all the orders for the sake of economy and accountability.

- Leadership prepares requirements for business resumption.

Disaster recovery is not business resumption. Your team is back at work, but in less-than-ideal conditions. Company leaders need to determine whether they can reoccupy their former workspace or whether they need to move to a new location or prepare the temporary workspace to become the permanent one. Then they must determine what they need to have to make it happen.

Planning for business resumption

The business or the organization is working again, but under disaster recovery conditions. Leadership must move the team to a new permanent working condition and resume the business.

- Leadership finds a new location.

Leadership chooses your current building, a new facility, or an interim space. Each department’s staff needs to draw up their space, equipment, and computing requirements for management.

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| <ul style="list-style-type: none">• Leadership plans to move staff. | <p>The most critical staff should either move first to keep them functional, or last to make sure there are no unforeseen difficulties. Leadership determines who moves first and the resources needed to move equipment and phone and data connections, as well as who needs to be informed of the move ahead of time.</p> |
| <ul style="list-style-type: none">• Leadership determines schedule, staff prepares. | <p>Leadership needs to move the organization in the way that will least affect performance, and those teams identified on the schedule need to determine what it will take to move them, in terms of boxes, carts, and personnel.</p> |
| <ul style="list-style-type: none">• Leadership moves staff. | <p>All teams are moved to the new permanent location and continue with the business as before. When all teams are relocated, business resumption is done. Update the DRP with lessons learned for the next time.</p> |

Additional resources

- Sign up for our [Disaster Recovery newsletter](#), delivered on Tuesdays.
- Sign up for our [CIO Exchange newsletter](#), delivered on Tuesdays and Thursdays
- Sign up for our [IT Management NetNote](#), delivered on Tuesdays, Thursdays, and Fridays
- ["Immediate response in disaster recovery"](#) (TechRepublic)
- ["Determine the best type of recovery site for your organization"](#) (TechProGuild)
- ["Don't overlook the human factor in your DR plan"](#) (TechProGuild)

Version history

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Modifications: Redesigned as a checklist

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