Agility Recovery
Prepare to Survive
CROA
Corporate Responsibility Association
Business Disaster Recovery:
Lessons Learned & Best Practices
Bob Boyd
Agility Recovery
To download a copy of these slides,
Please visit: http://agil.me/croadisasterlessons

CROA
Corporate Responsibility Association

Mission: Promote the practice and profession of corporate responsibility in service of good business. Educate and engage leaders at all levels to use corporate responsibility to reduce risk, improve operational efficiency, save money, attract talent, and encourage innovation.

CROA
Corporate Responsibility Association

CROA Committees:

- Ratings & Rankings
- Professional Development
- Diversity & Inclusion

CROA
Corporate Responsibility Association

Get Involved

Learn | Network | Advance

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Agility Recovery

Bob Boyd

President & CEO
Agility Recovery

Agenda

1. Events in Recent History
2. Disaster Lessons Learned
3. The Agility Story

2013 Year-In-Review

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- 62 Presidentially Declared Disasters, Affecting 37 states and territories
- EIGHT disasters causing over $1 Billion in Damage (below average)
- Worldwide:
  - 880 Major disasters worldwide
  - Over 20,000 deaths
  - Over $125 Billion in damage

Relatively quiet year for tornadoes & hurricanes, with the exception of March 18th storms and the Moore, OK Tornado.

2013 Federally Declared Disasters

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62 Total Disaster Declarations (FEMA.gov)

* Declarations as of December 18, 2013

U.S. 2013 Billion-dollar Weather and Climate Disasters

US Billion $ Disasters **1980 - 2012**

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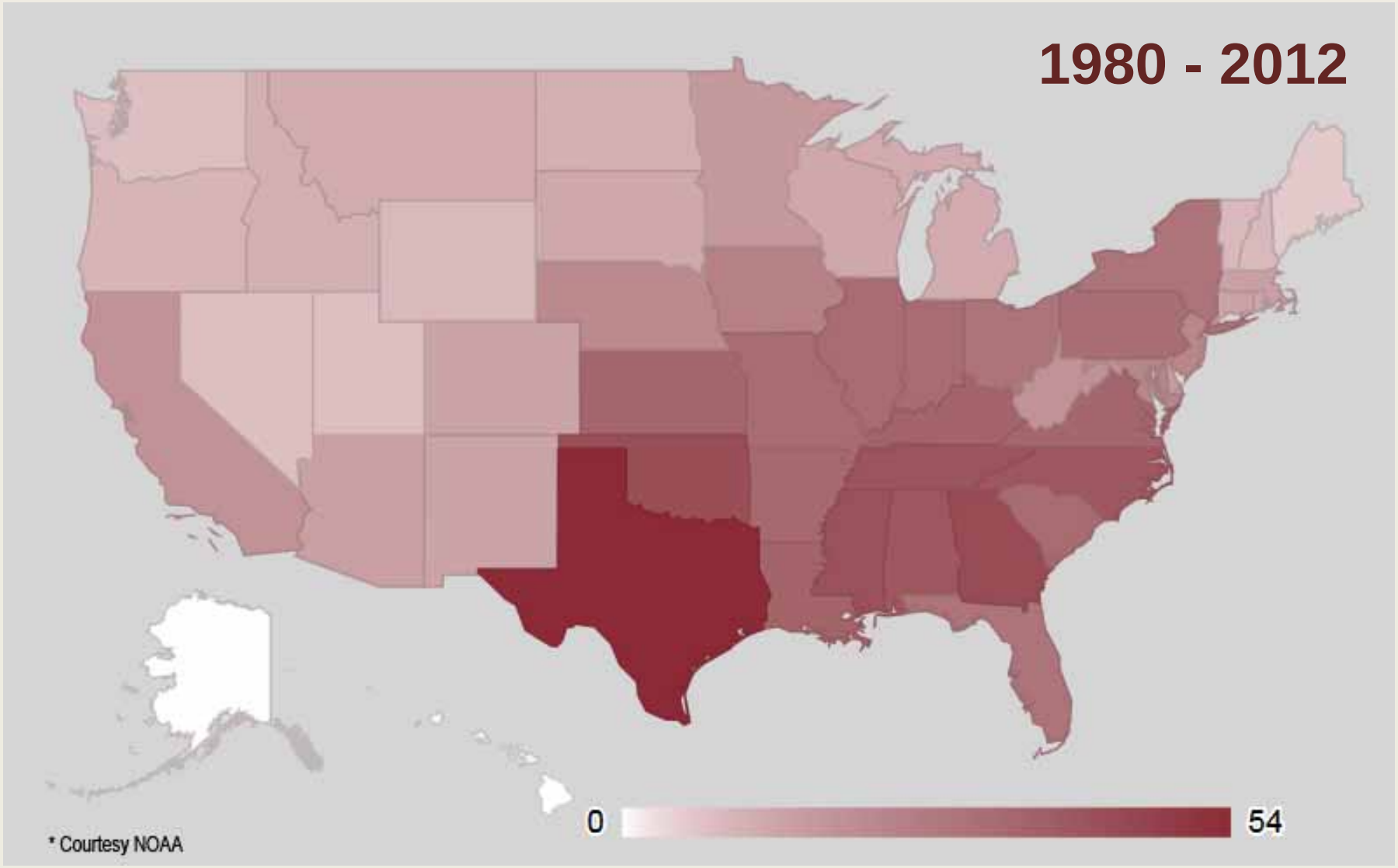

US Natural Disaster Figures

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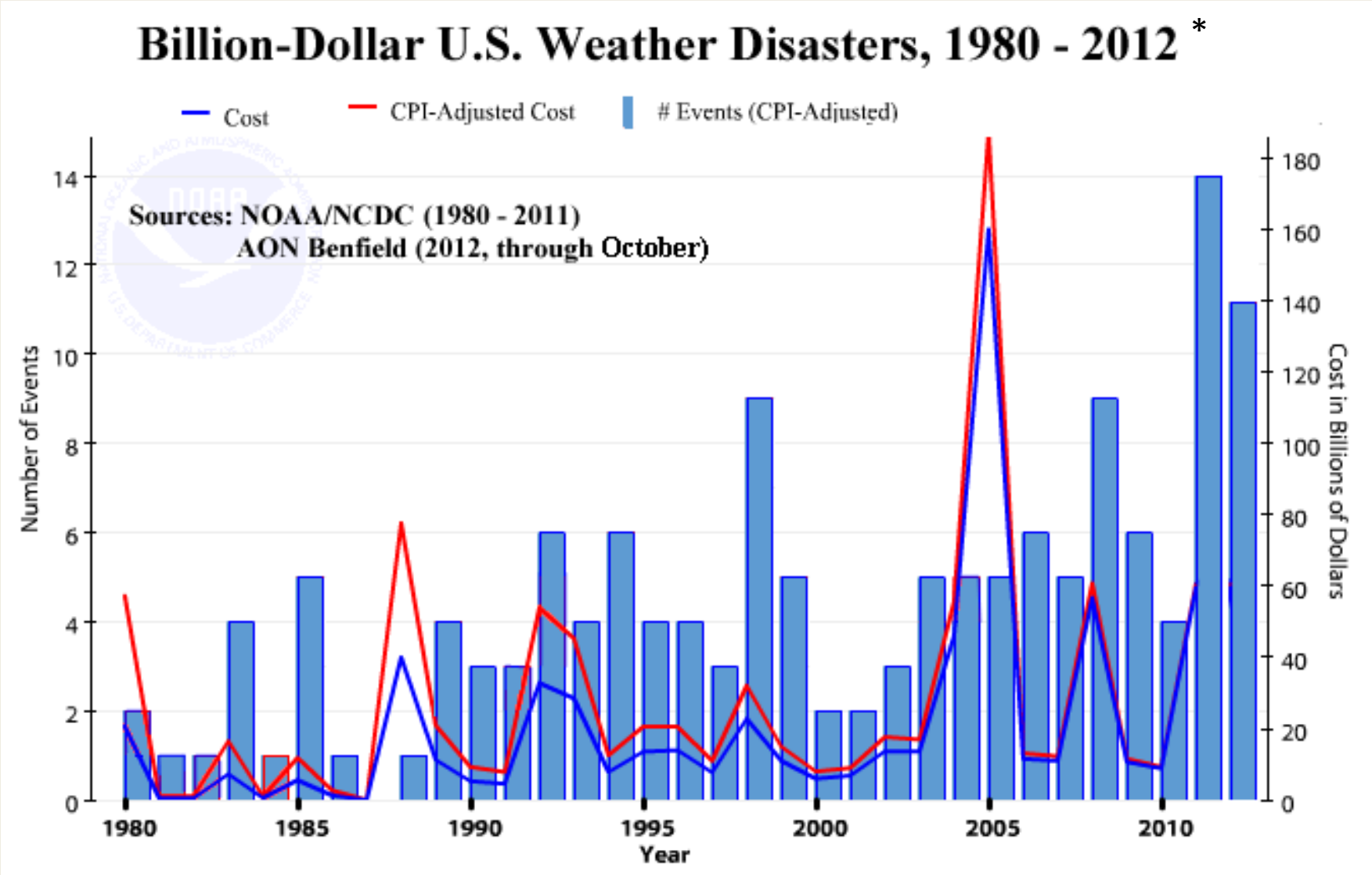

* Latest Data Available from NOAA

2013 Agility Recovery Events Summary

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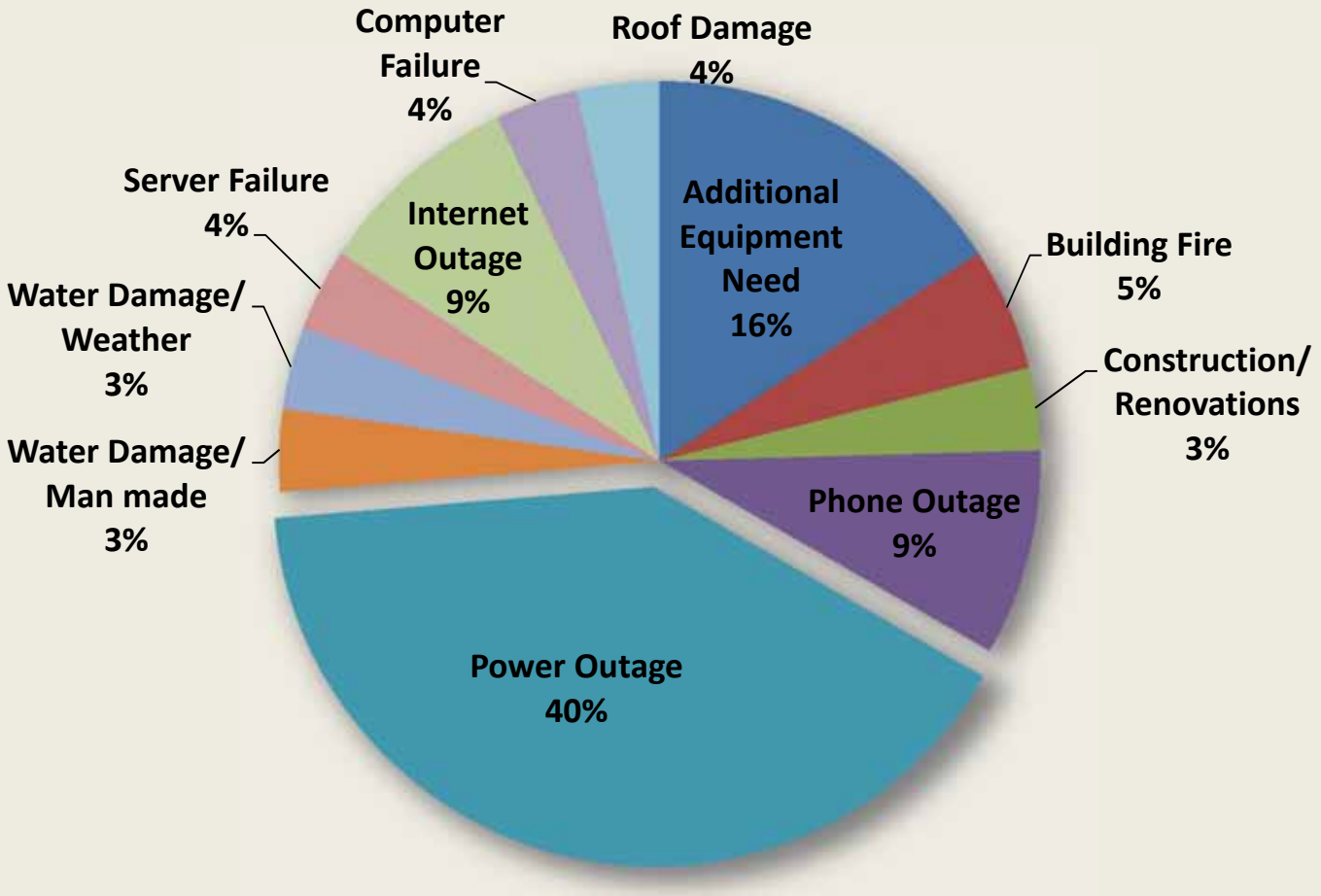
Agility Disaster Recoveries

Categorized by Type (Nearly 300 Individual Events Logged in 2013)



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Lessons Learned

Lessons Learned

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1. **Expect The Unexpected**
2. **Failure to Prepare Employees**
3. **Preparing Your Supply Chain**
4. **Ensure Proper Communications**
5. **Having No Plan At All**

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Lesson Learned…

1. Expect The Unexpected

The Unexpected

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Headline:

“San Juan Islands submarine communication cable severed”

- Phone and Internet outage caused by severed cable
- Most small businesses forced to close doors, or operate “cash-only”
- Tourists unable to pay for hotel rooms, meals, etc.
- **ATM’s non-functional**
- **Cell Towers impacted**
- 911 Centers down

The Unexpected

Agility Recovery

Headline:

“San Juan Islands submarine communication cable severed”

Lessons Learned:

- Incorporate LOSS of Internet & Phones into your Disaster Recovery Plan.
- Be sure to TEST your recovery plan and include a scenario similar to this.
- Utilize multiple wireless carriers in the event one network is compromised.
- Have a strategy for processing transactions without connectivity.

The Unexpected

Agility Recovery

Headlines:

“Terror at the Finish Line” “Blasts Rock Boston Marathon”

- Boston officials estimate as many as 500 businesses suffered losses due to bombing:
  - Candy Shop: $65,000
  - Restaurant: $200,000
- Lack of access to cash made payroll and rent payment nearly impossible
- Losses due to crime scene investigation, not damage from blast

The Unexpected

Agility Recovery

Headlines:

“Terror at the Finish Line” “Blasts Rock Boston Marathon”

Lessons Learned:

- Mobile Phones unusable during large scale regional event.
- Know how to communicate to employees, clients, partners, etc. without mobile access (Text messaging is best option).
- Have a strategy for relocating your operations if forced to do so on short notice.
- Have every employee or a core team trained in first aid/CPR.
- Know your local law enforcement, they may become your best friend during a crisis.

The Unexpected

Agility Recovery

Headline:

“Thieves target Caddo Nation; inflame leadership dispute”

- Political “spat” leads to armed robbery/break-in/vandalism
- Staff held captive at gunpoint
- Servers, computers stolen
- Sensitive personal data & financial documents lost
- No way to restore data, as person responsible is suspect

The Unexpected

Agility Recovery

Headline:

“Thieves target Caddo Nation; inflame leadership dispute”

Lessons Learned:

- Ensure OFF-SITE backup of important applications and data.
- Have appropriate on-site security to mitigate risk.
- Train employees on workplace violence.
- Have redundant ISPs and consider having multiple employees/executives have control over them.
- Should a controversy evolve in the workplace, proactively work towards resolution through moderation or consider legal advice. Don’t wait for worst case scenario.

The Unexpected

Agility Recovery

Headline:

“Fire at Norwich Pump Station Disables Water System”

- Arson shuts down community water system affecting water quality for 30,000
- Fire investigation delayed recovery
- Confusion as to generator type/size delayed recovery

VALLEY NEWS

Home News Obituaries Opinion Sports Life & Times Calendar

Norwich’s Water Wanes; Town Still Waiting on Fix for Pump

The Unexpected

Agility Recovery

Headline:

“Fire at Norwich Pump Station Disables Water System”

Lessons Learned:

- For critical infrastructure, processes – be sure to have an executable recovery plan that has been tested.
- Know ahead of time your power requirements.
- Have local connections for electricians, technical assistance.
- Know how to communicate effectively with your audience in the aftermath of an interruption.

The Unexpected

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Headline:

“Historic Blizzard Collapses Entire Call Center Building”

- 4 feet of snow in 24 hours collapses entire building
- 200+ seat Call Center destroyed
- Forced to relocate all employees, secure all new equipment and re-route phone lines
- As 1 of the largest employers in the city, a swift recovery was needed to enable hourly wage employees to continue working

Black Hills Pioneer

Local & Independent Since 1876

TMone collapses under snow

Posted: Monday, October 7, 2013 9:00 am

The Unexpected

Agility Recovery

Headline:

“Historic Blizzard Collapses Entire Call Center Building”

Lessons Learned:

- Your plan MUST include a strategy for total loss of a facility, whether due to fire, flood, etc. Have a means to secure workspace, technology, connectivity, physical infrastructure.
- Time = Money - For both the organization and employees, downtime is critical. Know how quickly you can restore data, re-establish connectivity, obtain temporary power, etc.
- Know your most likely geographic, environmental threats.

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Lesson Learned…

2. Failure to Prepare Employees

Failure to Prepare Employees

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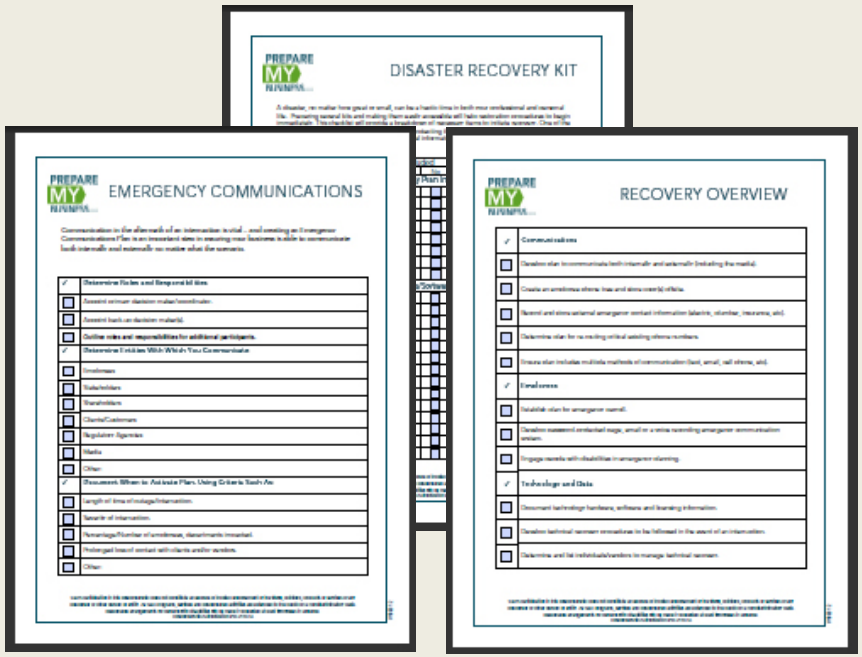
A. Employees' Plan Knowledge

1. Do they Know the plan?
2. Do they know where to find the plan?
3. Do they know their primary role?
4. Have you shared the plan with new hires?



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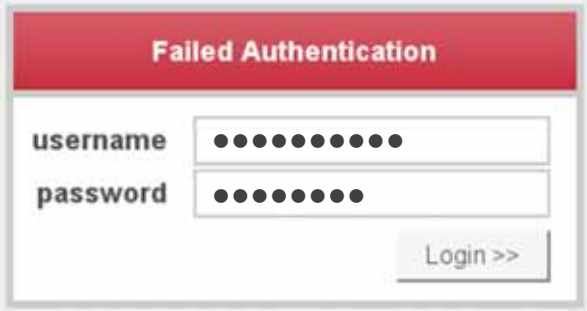
B. Work from Home Strategy

1. Productivity suffers
2. Inability to login to networks
   - Phone/Internet Outages
   - Power Outages
3. Unwillingness to report to duty
   - Family or Property in peril
4. Distractions
5. Child Care Issues



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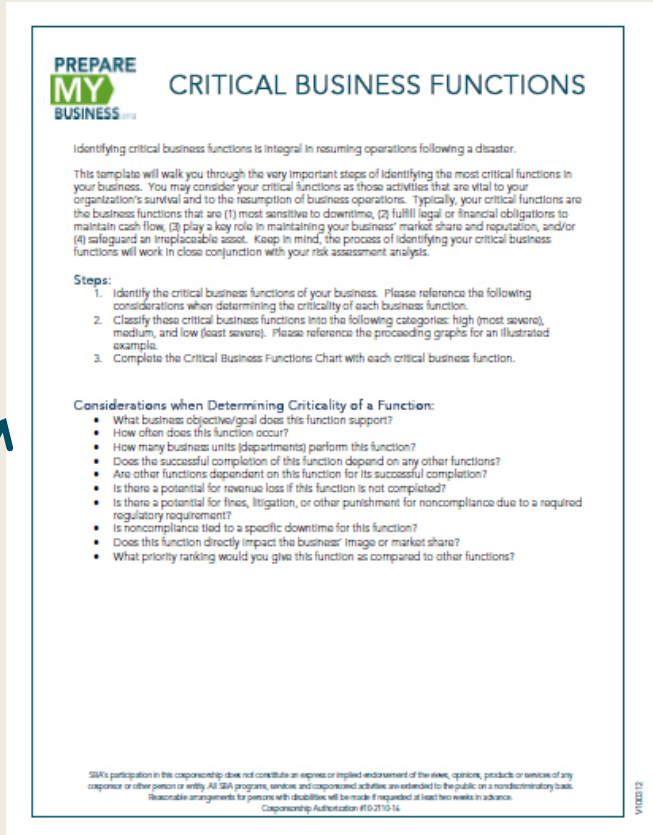
C. Cross-Training Employees

1. **Critical Functions must continue**
2. **Certain areas/departments may experience greater demand**
3. **Longer/Odd Hours may require additional staffing**

For this checklist and others, please visit:
http://www.PrepareMyBusiness.org



PREPARE MY BUSINESS

CRITICAL BUSINESS FUNCTIONS

Identifying critical business functions is integral in resuming operations following a disaster.

This template will walk you through the very important steps of identifying the most critical functions in your business. You may consider your critical functions as those activities that are vital to your organization's survival and to the resumption of business operations. Typically, your critical functions are the business functions that are (1) most sensitive to downtime, (2) fulfill legal or financial obligations to maintain cash flow, (3) play a key role in maintaining your business' market share and reputation, and/or (4) safeguard an irreplaceable asset. Keep in mind, the process of identifying your critical business functions will work in close conjunction with your risk assessment analysis.

Steps:

1. Identify the critical business functions of your business. Please reference the following considerations when determining the criticality of each business function.
2. Classify these critical business functions into the following categories: high (most severe), medium, and low (least severe). Please reference the proceeding graphs for an illustrated example.
3. Complete the Critical Business Functions Chart with each critical business function.

Considerations when Determining Criticality of a Function:

- What business objective/goal does this function support?
- How often does this function occur?
- How many business units (departments) perform this function?
- Does the successful completion of this function depend on any other functions?
- Are other functions dependent on this function for its successful completion?
- Is there a potential for revenue loss if this function is not completed?
- Is there a potential for fines, litigation, or other punishment for noncompliance due to a required regulatory requirement?
- Is noncompliance tied to a specific downtime for this function?
- Does this function directly impact the business' image or market share?
- What priority ranking would you give this function as compared to other functions?

SBA's participation in this cosponsorship does not constitute an express or implied endorsement of the views, opinions, products or services of any cosponsor or other person or entity. All SBA programs, services and cosponsored activities are extended to the public on a nondiscriminatory basis. Reasonable arrangements for persons with disabilities will be made if requested at least two weeks in advance.
Cosponsorship Authorization #10-2110-16

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D. Transportation Issues

1. Mass Public Transportation Shut Down
   a) Car Pooling
   b) Overnight accommodations nearby
2. Fuel Shortages
   a) Storage of Fuel for Critical vehicles/staff
   b) Fuel vendor for deliveries
3. Restricted Access to non-Residents
4. Damaged/Destroyed Vehicles

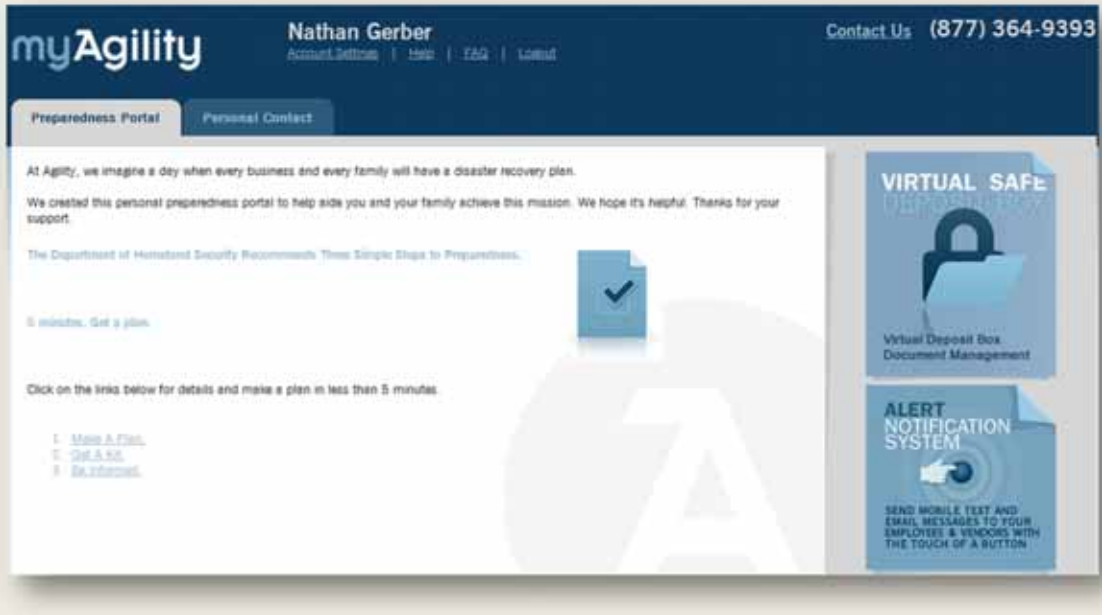
Prepare Employees

Agility Recovery

E. Family Preparedness

1. Do they have a plan?
   a) Evacuation plan
   b) Document Storage
   c) Alert System
   d) Emergency/Go Kit
2. How can your organization help?
   a) Workshops
   b) Checklists
   c) Emergency Kits

myAgility family



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Lesson Learned…

3. Preparing Your Supply Chain

Supply Chain/Key Vendor Preparedness

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A. **3rd Party IT: BOTTLENECK**
B. **Power/Communication Vendors: BOTTLENECK**
C. **Payroll Companies**
   - Do you know their Recovery Plan?
   - What is the process for an interruption during Pay Cycle?
   - Are they integrated into your Exercise?
D. **Attorney/CPA Firm**
   - Can you reach them following in interruption?
     Are they involved in your planning process?
E. **Delivery/Shipping Partners**
   - What is the protocol for an interruption?
   - How will any delay from these partners affect your business?

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Lesson Learned…

4. Ensure Proper Communications

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Communications Failures

1. Network Interruption
2. Mobile Devices
   - Single Carrier for entire company?
   - Chargers for mobile devices?
3. Single Means of Communication
   - One email server
   - Unfamiliarity with texting
   - Single phone system, with no backup or means for simple transfer/forwarding
   - No land lines in the office or at leadership teams' homes

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Single Communicator/Spokesperson

1. Often the CEO or President
2. Single person inhibits:
   a. Leadership to employee communications
   b. Decision-making ability
   c. Organization to stakeholder communications
   d. Media Relations

Keys to Proper Communications

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- Create a Crisis Communication Plan
- Have multiple redundant means of reaching employees and key contacts independent of terrestrial phone lines and a single cellular network as much as possible
- Keep Emergency Contact Lists Updated
- Utilize Online Message Boards
- Maintain Access to Your Website
- Keep Those Outside your Organization Informed
- Have a Media Relations Strategy and Plan

For a Crisis Communications Checklist, Visit: **http://agil.me/crisischecklist**

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Lesson Learned…

4. Having No Plan At All

10 Steps to Preparedness

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1. **Assess your risk – both internally and externally.**
2. **Assess your critical business functions.**
3. **Prepare your supply chain.**
4. **Back-up your data.**
5. **Create an emergency management plan.**
6. **Create a crisis communications plan.**
7. **Assemble emergency supplies.**
8. **Plan for an alternate location.**
9. **Review your insurance coverage.**
10. **Test your plan.**

WhitePaper: “11 Common Disaster Recovery Mistakes”:
http://agil.me/croa11mistakes

Agility Recovery

The Agility Approach

Agility Recovery - History

What We Do

We provide 4 key Elements of Disaster Recovery

1. **Office Space**: Everything needed for your employees to work
2. **Power** for the office
3. **Communications:** Telephone and Internet access
4. **Computer System:** Computers, servers, printers, fax

Culture of Success

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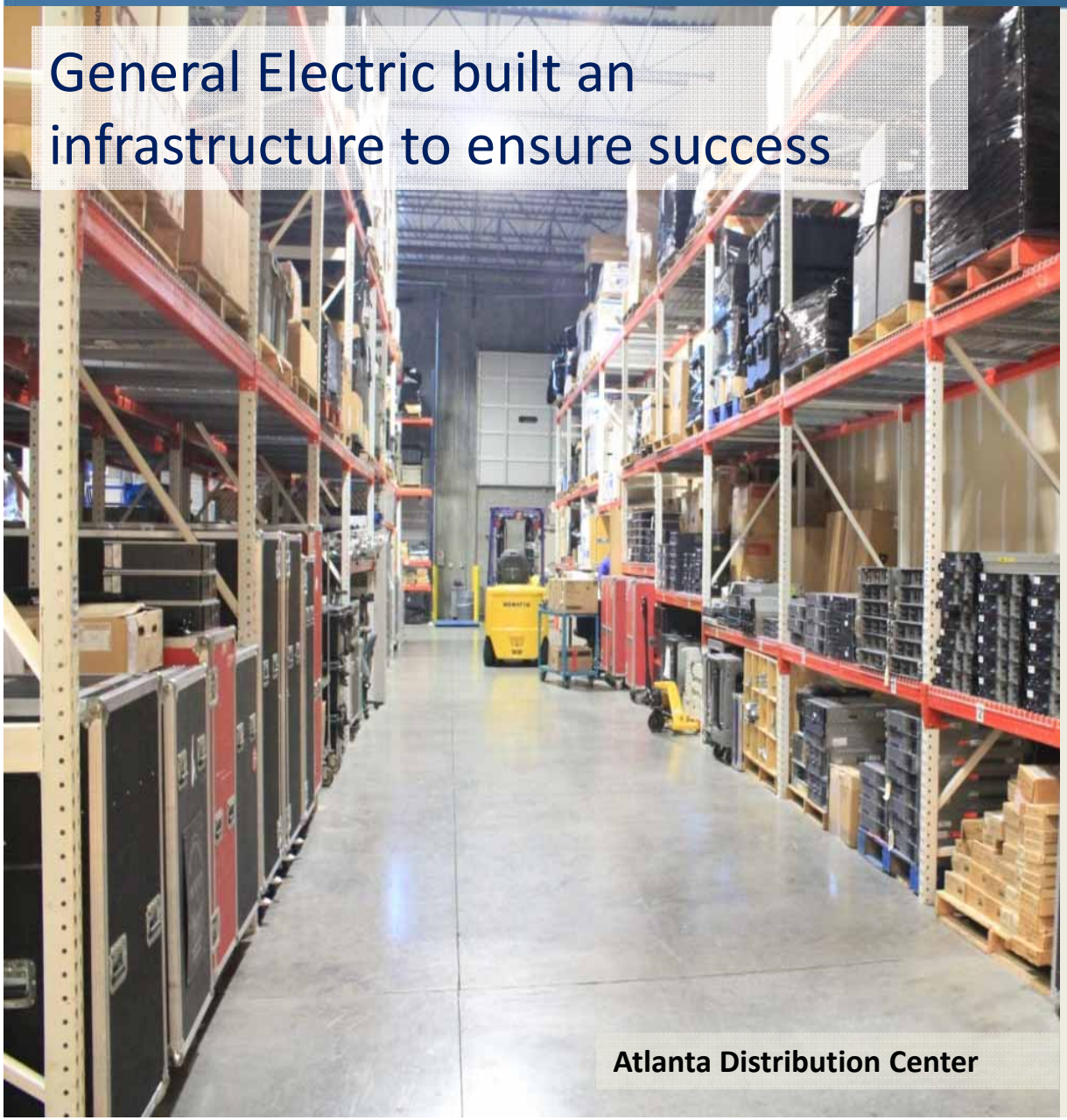
General Electric built an infrastructure to ensure success



Atlanta Distribution Center

- 25 years
- Rescued 1000's of businesses
- Never failed

New Vision

Agility Recovery

The industry focused on the needs of the Fortune 500.

This model is too expensive for most businesses.

In 2004, Agility defined a new vision.

Agility will bring disaster recovery solutions to ALL businesses.

New Business Model - ReadySuite

Agility Recovery

Agility created a solution that all business could afford.

For a small monthly fee, normally $495/month,
you can protect your business.

When You Become a Member

Agility Recovery

A continuity planner will contact you and gather the info we need to recover your business if you have a disaster. e.g.

- How many critical employees need to be up and running?
- What are the power requirements of the office?
- Where do you store your data?
- How do you want your phone calls handled during a disaster?

Ben Pritchard Member Services

When You Become a Member

Agility Recovery

All information is placed in a password protected site called **myAgility**.

myAgility is the foundation of your recovery plan.

When You Have A Disaster

- Agility's operations team works with you to determine your needs.
- You only pay for Agility's out-of-pocket expenses:

➢ If we fly a technician to your office to set-up computers, we charge you for the airfare, but not the time.

➢ If you need a generator, we'll deliver it and bill you our exact costs.

➢ If you need a server, we take one from our stock and ship it to you. You pay for the shipping.

Agility Quickship Case

When You Have A Disaster

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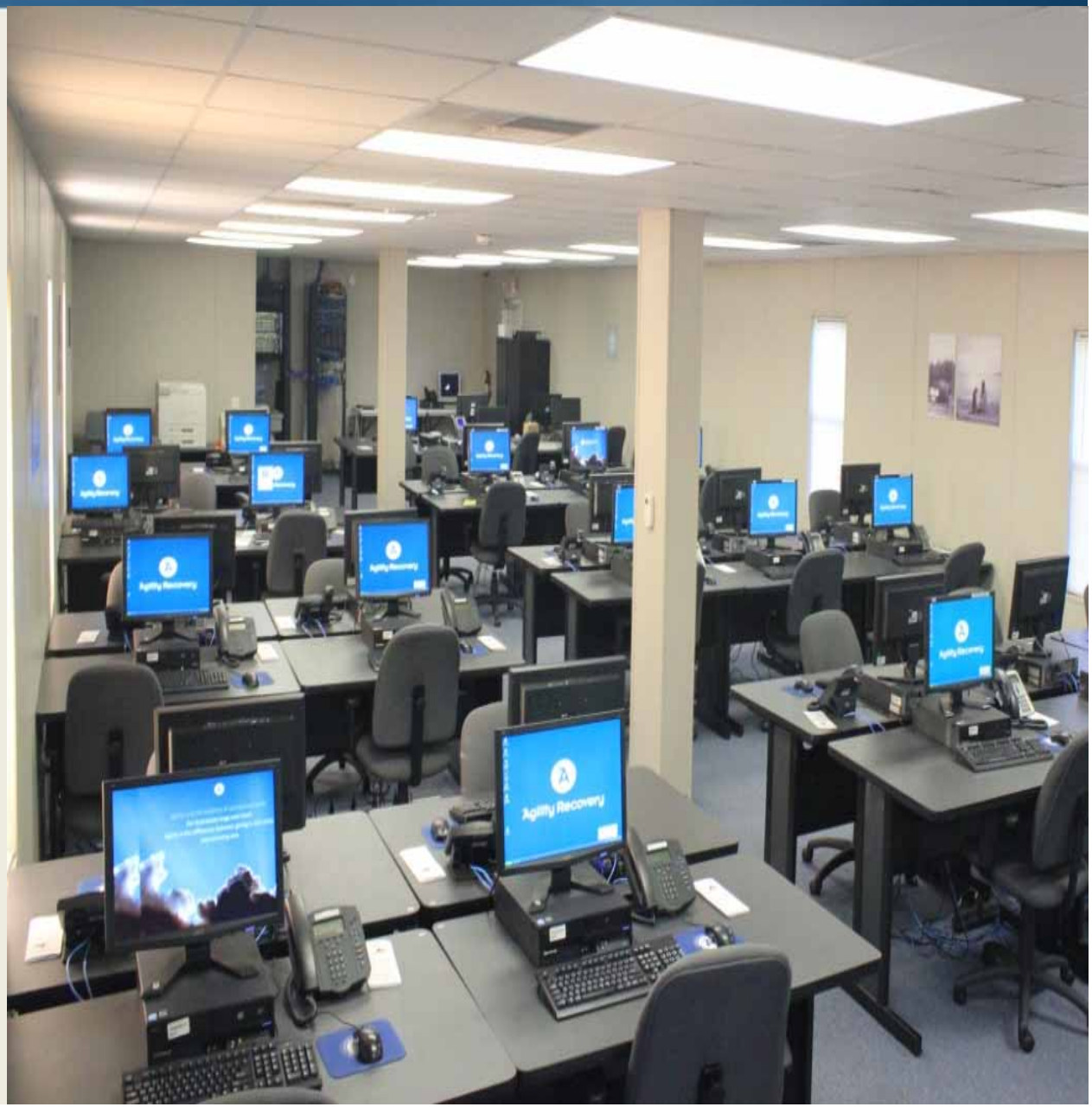
- Regardless if you have Agility or not, you would still have the same recovery needs.
- But Agility will get it done faster, cheaper and more effectively.
- Most importantly, we get it done every time.



Disasters Happen

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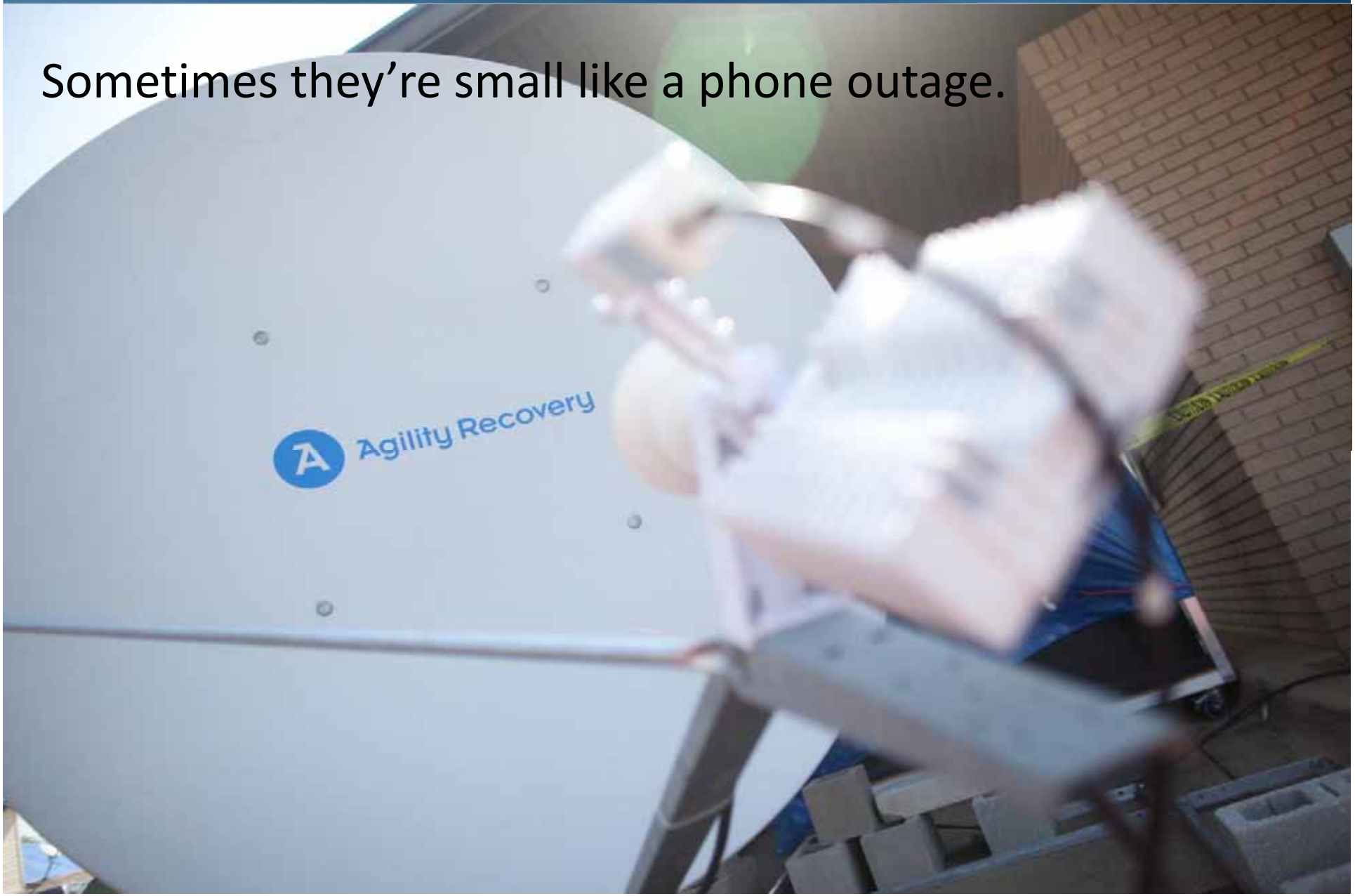
Sometimes they’re small like a phone outage.



Disasters Happen

Agility Recovery

Sometimes they're big like a tornado.

Photo taken by
Agility Recovery team

Disasters Happen

Agility Recovery

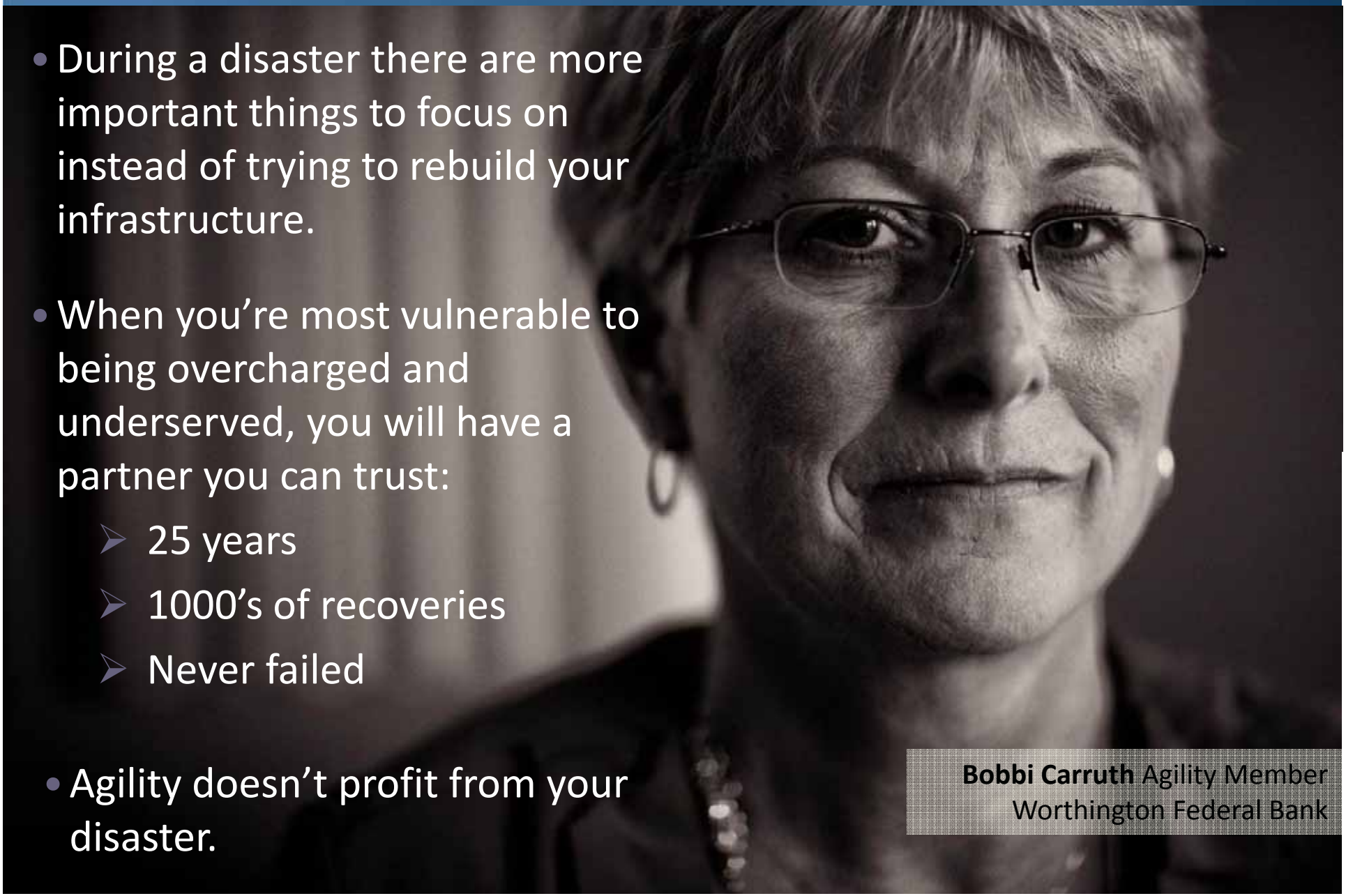
If you don't have a plan your business will be forever altered.

Photo taken by
Agility Recovery team

Disasters Happen

Agility Recovery

- During a disaster there are more important things to focus on instead of trying to rebuild your infrastructure.
- When you're most vulnerable to being overcharged and underserved, you will have a partner you can trust:
  - 25 years
  - 1000's of recoveries
  - Never failed
- Agility doesn't profit from your disaster.



Bobbi Carruth Agility Member
Worthington Federal Bank

Ask Yourself…

- Do you believe a disaster could happen?
- Do you believe that without a plan, your business will suffer?
- Do you believe Agility, after 25 years and 1000's of recoveries will be there?

DCH Credit Union Agility Members
Tornado Recovery

Ask Yourself – Do You Believe?

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If you answered, “Yes,” then Agility is a fairly easy decision.

We welcome you as a member.

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Questions?

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