

# Business Continuity Plan Checklist

This checklist is a guide to help you build a comprehensive business continuity plan. Use it to prepare for and recover from any event and **achieve true business resilience.**

	Not Started	In Progress	Completed
 <h3>Plan Overview and Objective</h3> <p>State the purpose and objectives of the business continuity plan. Typically, the purpose of a business continuity plan is to ensure that the business can recover from a serious incident or disaster.</p>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
 <h3>Teams and Roles</h3> <p>Identify the individuals who are part of the Business Continuity team and include their role, responsibilities and up-to-date contact information.</p>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
 <h3>Risk Assessment</h3> <p>Identify the greatest risks to your organization. Also known as a risk assessment, the purpose of this exercise is to evaluate the likelihood of those risks. Risks can vary by industry, company size, geographic location, economic conditions and may include natural disasters, regulatory changes, cyber threats, etc.</p>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
 <h3>Critical Business Functions &amp; Dependencies</h3> <p>Identify the processes, resources and vendors that are absolutely vital to the survival of the company and how they are dependent on one another. Typically, critical functions are: 1) highly sensitive to downtime, 2) fulfill legal or financial obligations to maintain cash flow, 3) play a key role in maintaining the business' market share or reputation, and/or 4) safeguard an irreplaceable asset.</p>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
 <h3>Business Impact Analysis (BIA)</h3> <p>Determine and evaluate the potential consequences of an interruption to the critical business functions, including the operational and financial impact. This could include: lost sales and income, increased expenses, regulatory fines, customer dissatisfaction. It's important to collaborate with other members of the organization who have in-depth knowledge and experience with the various business functions. You can use a Business Impact Analysis questionnaire to gather this information and understand how the business functions are dependent on one another.</p>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



## Workflow and Tasks

Create and clearly document step-by-step instructions, tasks and recovery time objectives to restore each critical business function following a disaster. These plans should identify team members involved in the recovery plan, up-to-date contact information, emergency contacts and a clear chain of command. Some sections that may be included in your recovery plans include:

- Alternate locations and temporary facilities, which may include policies for telecommuting and working from home.
- A communication plan to notify staff and stakeholders.
- Backup vendors, suppliers and resources with their contact information.
- Insurance policies.
- Runbooks to recover critical IT processes.
- A call tree (also known as a phone tree) to notify members of the organization or an emergency notification system.
- Evacuation procedures.
- Policies on staggered work shifts.
- Policies on contracting to third parties.
- Manual workarounds when IT systems are unavailable.



## Test, Exercise and Educate

The final step in a comprehensive business continuity plan is to establish policies on updating, testing and exercising your recovery plans. The purpose of this is to identify gaps in the plans before a disaster strikes. This also facilitates communication with the organization and ensures that staff know what to expect well before an event occurs. Testing should occur on a regular basis (at least once a year) and can include tabletop exercises, simulations or even a surprise incident.

	Not Started	In Progress	Completed
Workflow and Tasks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Test, Exercise and Educate	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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