

Guerrilla Tactics for Continuity Planners, Second Wave
By Gene Tucker, CPP, CFE, CBCP and friends
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It is dark. It is cold. Strange sounds can be heard all around. I move cautiously forward, stopping only to apply more bug repellent that seems to attract even more mosquitoes. Suddenly, a bright light searches in my direction; it is the security guard. I slowly find my way to the Finance department and with my teeth, tear the strips of yellow caution tape and nail it across their office doors. They were reluctant to begin their planning. Finance knew that a damaging shaker is overdue, but I could not tell them exactly when it will happen. Year-end close was more imminent and predictable.

Finance needed an event deadline they could 'see and feel.' When I tell them there is an 'x' percent chance of a damaging earthquake in the next 30 years, they hear the 30 years and give less thought to the fact that it could just as easily happen within the next hour. When they arrive to work in the morning, they will need to activate their continuity plans. I warned them this would happen six months ago. But they will be ready; I used a few new tactics from the Guerrilla Fighter's bag of tricks.

Break Bread

Did you say food? I'll be there. I almost always list as a requirement for membership on Emergency Response Teams the ability to eat lots of pizza. I find it interesting that at least one person on the team will confirm its availability at the first meeting. For those with too much on their plate (pun intended only if you like it), a lunchtime meeting may be a good motivator to get malingering participants to attend planning meetings, or at least reduce the number of excuses by one. Demonstrating the power of this concept, we nicknamed a major full-scale exercise with the City as 'Cookie Cutter' because we served chocolate chip cookies at the planning meetings. What you offer can be as simple or as elaborate as your budget will allow. Offering a light lunch or refreshments at the meeting often makes attendees more receptive to your goals. And please, don't get tomato sauce on your meeting notes. Thanks Dick for the suggestion (lunch next Thursday?).

I Want To Speak To Your Manager

Another good motivator: If your boss's boss or your boss's boss's boss needs to sign off on team plans within their realm and report this approval to an Executive Committee, you may get a higher degree of participation by all involved, especially if you are able to accomplish this on a periodic basis. Funny how managers take a special interest when they realize that senior management is directly involved.

You're The Best

We use the results of the Business Impact Analysis in part to help identify and justify funding for recovery strategies and often to justify the existence of the planning effort in the first place. I've seen the results of the BIA used internally to motivate certain process owners to get busy. 'If you go down, we all go down.' 'Your function is the cornerstone of our entire planning process.' 'The analysis indicated that the company would lose 'x' dollars if we don't get these plans in place.'

This can, however, work against you if the BIA indicates that a function is not really critical. Then don't worry about it? True, you may be able to survive 30 days or more without this function, but if you are not going to pay these people for their entire down time, they may not be there when their function becomes more critical. Good to have a plan anyway, sometimes just to have their contact information ready to go if things change during the recovery. 'Yes, we don't need you for 30 days, but XYZ's Accounts Payable has a plan and we don't.' Oh, the guilt.

Good Housekeeping Seal of Approval

Leverage company philosophy and slogans. "Everything Works Better When Everything Works Together." "Do The Right Thing." "The Customer Is Always Right." Well, two out of three is not bad. If your company issues Corporate rules of life, see if you can use them to justify or motivate people to accomplish your goals. One local financial institution is advertising its customer service orientation; so much so that their BCP manager would not be surprised if an account representative would wash a depositor's car if asked. A disaster may severely affect customer service when they need it the most. The manager plans to use this focus to help motivate further internal participation in planning. Thanks Al.

'Get Away From Me Son, You Bother Me'

As important as Business Continuity is, don't lose your perspective relative to company priorities. It may be true that other initiatives may be precedent. It is important for us to keep BCP in front of their creative minds, but remember: the 'squeaky wheel' sometimes gets thrown in the junkyard. Don't be a pest (well, yes, sometimes you have to nag). Be certain that your demands on people are reasonable and effective. Step back and polish the gun barrels. Stockpile your ammo. Load and lock, and be ready to fire when the time is appropriate.

Consider setting exercise schedules based not on a set number of simulations per year for everyone, but on the criticality of the function. The most critical functions are tested

more often, others less often (in this case ensure that resources and strategies don't become out of date).

Show Me – I'm From (Which State Is It?) Revisited

Frequently test planning activities bring to the forefront that you have a system or process that isn't well defined or supported in production, especially if there are vague support roles and responsibilities for, let's say, infrastructure systems or for various components of the network. While production is up and running smoothly, nobody worries about these systems, they work - right! But when you try to recover the process or system in a test environment, or heaven forbid an actual disaster, all of a sudden some of these items don't really work so well, because no one remembers how to restore, recover or activate the system, process, or component. The only tactic remaining for the frustrated DR Planner may be to let the systems fail during a recovery test. You can try very hard to get the issues fixed ahead of time, but since no one really wants to own up to them, you sometimes have to let them fail. Just be sure to include the failures in the test results report. You would be amazed how soon you can get a project team together to analyze the root cause, determine a solution, and implement it. Sometimes the production processes have to change as a result of the test findings. Exercising is such a wonderful concept that begs repeating. Thanks Bonita!

Pucker Up

Kill'em with kindness. Thank members for their participation in some formal way. An annual letter from your executive sponsor is always appreciated, adds to importance of your efforts, and keeps the process in their face. Get team member recognition into the company newspaper. Buy little pins or other trinkets. You know the routine.

Never Let Spell Checker To Do Your Proofreading

I asked several respected colleagues for ideas by sending emails asking for Gorilla, not Guerrilla Tactics. Got back a lot of interesting responses, some I have combined below, some are purely original. Hope newcomers to the industry don't read this.

- Ya know. . . . in some cases Gorilla Tactics just might work. . . it certainly gets people's attention, and who can say no to a DR or BCP Planner gone amuck. . . ! Rush into the room hooting and beating your chest. 'Tell me again when you'll have that test script completed!' Hoot, hoot, hoot, beat, beat, beat. 'Right now sir! Right away sir!'
- I think I like Gorilla Tactics better. It seems to always work, especially in the Command Center: nothing like a good hooting and chest beating to get the mainframe ipl'ed on time, or a network line monitored, or a tape mounted, etc.

- I don't know, sounded right to me the first time, especially the hooting and beating the chest!
- Real close to my favorite of bringing Guido and Frankie to senior management meetings. They usually don't have to say anything, just being there with the pin-striped suit, snap brim fedora and bulge under the arm pit can go a long way to encouraging quick agreement on a wide variety of subjects! They usually work cheaper than a couple of full time consultants; certainly the time evolved is much shorter!
- Make tools out of whatever you find in your environment. Go ahead; stick a twig in that nest of insects.

Thanks Chris, Bonita, Bob, and Stacey