BUSINESS CONTINUITY CHECKLIST

Congratulations! A crisis has struck, you were prepared for it, and it has passed.

Now what? You may have to start from scratch, pick up somewhere in the middle, or continue on from where you left off, a little worse for wear.

This checklist will help you get your business up to speed more quickly and hopefully more completely, once a crisis enters Stage 4: Crisis Resolution. Feel free to modify it to suit your own organization, as this is just a framework.

Advance Planning Checklist

1. Identify a Continuity Operations team for your company.

2. Decide who can order a reduction, shutdown or relocation of operations in times of crisis or immediately following a crisis.

   - Determine who must be paid, how long each staff member will be paid, how they will work remotely, how paid time off may be used during a slowdown or shutdown and what benefits will be paid and for how long.

3. Create duplicate records of all critical business documents: business license, articles of incorporation, partnership agreements, bylaws, EIN and business license numbers, corporate seal, minutes and resolutions from official meetings, insurance policies, software registration numbers, etc., vendor lists, contact information, employee directories and personnel records, etc.

4. Back up of all key data on servers and company computers. Ideally, data should be backed up at least weekly to the cloud or remote server locations that are off-site and offer remote access capabilities.

5. Identify all the functions that are critical to survival. These are the services that need to be maintained during a crisis and/or restored following a crisis.

   a. Administrative

   b. Information Technology

   c. Accounting/Bookkeeping

   d. Human Resources

   e. Facilities

   f. Production, Warehousing, Fulfillment

   g. Inventory

   h. Raw Materials/Supplies

   i. Customer Service

   j. Communications/Marketing/Media Relations

6. Develop and maintain a technology plan

   a. Critical and non-essential functions

   b. Remote access to data, systems and computers

   c. Web access

   d. Teleconferencing capabilities

   e. Logins and passwords

   f. Software ID/registration information and codes

7. Develop a plan to continue payroll, billing and collection functions.

8. Alternate locations to continue office, customer and fulfillment needs.

   a. Office spaces available

   b. Warehouse spaces available (if applicable)

   c. Furnishings available

   d. Parking/Access

   e. Phone/Internet access

   f. Utilities

If a reduction, shutdown or relocation is possible:

1. Inform the president/owner.

2. Contact the CCC Manager.

3. Follow the instructions in the Business Continuity Plan and the Crisis Plan for the specific incident in question.

4. Notify personnel, board, customers and suppliers of the potential for a slowdown, shutdown or relocation.

5. Test the employee section of your website and the out-of-town phone number employees should contact to leave an 'ok message' in a crisis.

If a reduction, shutdown or relocation is required:

1. Activate the Business Continuity Plan and the Crisis Plan.

2. Secure the company's facilities as outlined in each plan.

3. Notify stakeholders that a slowdown, shutdown or relocation is occurring. Give them further instructions.

4. Determine near-term liquidity needs.

5. Arrange for mail to be stopped, held or forwarded temporarily to a new location.

6. Track the recovery expenses of all personnel for possible reimbursement, such as overtime, travel or equipment rentals.

7. Record any injuries in the OSHA logs and be sure you report these to the state's L&I department.

8. Determine what resources (staff, technology, equipment, facilities, etc.) are needed to move back, reopen or restart operations.

9. Create a phased approach to resume full operations.

10. Communicate this plan to the Business Continuity Plan team, president/owner and CCC Manager.

11. Communicate this plan to employees.

Reopening Operations

1. Inspect facilities for damage. Get necessary state, county and local approvals to return to operations.

2. Confirm with local authorities that it is safe for employees to return to work (i.e., roads are clear, bridges are safe, etc.).

3. Re-establish utilities.

4. Establish business priorities.

5. Contact initial staffing needed to reopen for business.

6. Inventory damages.

7. Check documentation requirements for insurance, federal, state and local disaster aid, etc.

8. Re-establish computer systems, retrieve back ups.

9. Contact vendors.

10. Bring in all services that were performed remotely.

11. Bring personnel back in phases to support functions as they are restored.