



Sample Resiliency Plan Outline

This outline can be used as a “starter” for anyone pursuing business continuity, disaster recovery, or resiliency planning. Customize it to the situation for your sites, technology sourcing, staff locations, etc.

1. Document Version Control
2. Overview
 - 2.1. Business Overview
 - 2.2. Goals
 - 2.3. Scope
 - 2.4. Scenario and Business Impact Matrix
 - 2.5. High-level Technology Architecture
 - 2.5.1. Systems resiliency
 - 2.5.2. Network resiliency
 - 2.6. Key Assumptions
 - 2.6.1. Facilities – alternate sites or services
 - 2.6.2. Replacement Equipment
 - 2.6.3. System and Data Back-ups
3. Team
 - 3.1. Resiliency Team
 - 3.1.1. Names and Contact Information
 - 3.1.2. Command Center details
 - 3.2. Roles and Responsibilities
 - 3.2.1. Internal teams – Operations, IT, Others
 - 3.2.2. External resources – Vendors, 3rd parties
4. Declaration/Activation and Execution of Resiliency Plan Scenarios
 - 4.1. Responsibility for Activation/Deactivation
 - 4.2. Scenario definitions and levels/triggers for activation
 - 4.3. High Level Scenario Actions/Processes and Timelines
 - 4.4. Scenario Checklists
5. Communications
 - 5.1. Critical Notifications of Office Closure
 - 5.2. Communications Channels, Messages, and Recipients
6. Execution Procedures and Owners
 - 6.1. People Coordination
 - 6.1.1. Meeting/Gathering sites
 - 6.1.2. Transportation contacts between primary and backup sites
 - 6.1.3. Hotel/Motel reservations by backup site
 - 6.1.4. Expense procedures for backup sites
 - 6.1.5. Work at Home or other alternate location(s) transition processes
 - 6.2. Process
 - 6.2.1. Evacuation Checklist
 - 6.2.2. Employee Hotline
 - 6.2.3. IVR/Phone Message Update Procedure
 - 6.2.4. Web Site Update Procedure
 - 6.2.5. Mobile Update Procedure
 - 6.2.6. Social Media Update Procedure
 - 6.2.7. Post-Office Mail Forwarding to Recovery Site
 - 6.3. Technology
 - 6.3.1. Re-routing of Main/Toll Free Numbers
 - 6.3.2. Failover Information by component
 - 6.3.3. Failover Procedures for Agents (by system, as appropriate)
 - 6.3.4. Change Procedures specific to Work at Home



- 6.3.5. Change Procedures specific to network access from alternative locations
- 6.3.6. Other Systems or Network Change Procedures
- 7. Full Recovery
 - 7.1. Facilities
 - 7.1.1. Checklist for Facilities Safety/Inspection Prior to Reoccupation
 - 7.2. People
 - 7.2.1. Transportation process to return staff to primary site
 - 7.2.2. Transition process to return from Work at Home to primary site
 - 7.3. Process
 - 7.3.1. IVR/Phone Message Update Procedure
 - 7.3.2. Web Site Update Procedure
 - 7.3.3. Mobile Update Procedure
 - 7.3.4. Social Media Update Procedure
 - 7.3.5. Post-Office Mail Forwarding to Recovery Site
 - 7.4. Technology
 - 7.4.1. Move Main/Toll Free Numbers Back to Primary Facility
 - 7.4.2. Each System and Network Recovery
- 8. Event Review
 - 8.1. Postmortem Review
 - 8.2. Lessons Learned
 - 8.3. Update Documentation
- 9. Testing
 - 9.1. Top Scenarios
 - 9.1.1. Rerouting Contacts, Updating Messaging
 - 9.1.2. Building Evacuation/Relocation (and Work at Home Agents)
 - 9.1.3. Systems Down
 - 9.1.4. Return to Normal Operations
 - 9.2. Frequency and Responsibilities
 - 9.2.1. Testing Schedule (e.g., Annual or Bi-annual)
 - 9.2.2. Testing Roles and Responsibilities
- 10. Resiliency Plan Maintenance
 - 10.1. Events to Trigger a New Version or Update
 - 10.1.1. Informational Changes
 - 10.1.2. Process Changes
 - 10.2. Responsibility
 - 10.4. Version Control and Copy Storage, Access, and Management
- 11. Appendix A – Employee Availability and Contact Information
- 12. Appendix B – Critical Business Functions Information
- 13. Appendix C – Other Contacts and Resources
 - 13.1. Internal
 - 13.2. Vendors
 - 13.2.1. Network
 - 13.2.2. Contact Center Technology Platform
 - 13.2.3. IVR
 - 13.2.4. Performance Tools
 - 13.2.5. CRM, KM, etc.
 - 13.2.6. Backup services
 - 13.3. Key Contacts
 - 13.3.1. Bank
 - 13.3.2. Utilities
 - 13.3.3. Emergency Management Agency
 - 13.3.4. Hospital(s)
 - 13.3.5. Insurance Agent
 - 13.3.6. Post Office, FedEx, Other Shipping