Balancing Customer *and*
Organizational Needs

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Session Objective & Panel Members

Achieving the right balance between your customer needs and your own internal requirements is a critical component in the successful execution of a Disaster Recovery Plan.

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Moderator

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Proactive
Approach

Managing the Crisis

- When solutions provided are aligned with those of your customers, your needs are, in fact, their needs.

- During a crisis it can be difficult to manage the needs of your organization while keeping customers happy.

- Maintaining this delicate balance will strengthen your customer relationships and be a driver for future business.

Proactive
Approach

Disaster? You Declare, They Declare

Understand "the plans" - Yours and your customers

- Proactively Compare Plans
- Indentify Gaps & Points of Contradiction
- Consider incorporation of plan into contractual agreements

Service Disruptions

- Impact to Service Level Agreements
  - Consider not only our SLA's with your clients but your clients commitments to their customers
- SLA changes during transition need to be understood so appropriate work around is implemented, i.e., secondary vendor, movement of work

Transition to Normal Operations

- Set appropriate expectations
- Ensure client understanding of ramp up period & impact

Proactive Approach

Keys to Execution

Allocation of Resources

- Build the Response Team
  - Leadership Review Process: Identify 'A' players
  - Designate First Responders in all functional areas
  - Command Center / Project Lead

Empowerment

- Leaders of each functional area must be empowered to make decisions and "do the right thing" for each and every customer

Voice of the Customer

- Customer Perspective is Critical
  - Ensure your client services teams are included in pre and post disaster discussions to ensure all client needs and requirements are being addressed

Proactive Approach

What's "in the envelope"?

Understand your clients' security and regulatory requirements

Plan for physical security, data exposure, etc.

Back up sites require vetting before disaster strikes

Managing Communications

Internal & External Consistent Communication

- Provide regular and substantive updates, milestones, critical steps, etc. internally & externally

Multi-Level Communication Plan

- Frequent touch points
- Quarterly Business Reviews
  - Updated escalation tree
  - Partnership impacting changes

Proactive Approach