

# 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.

## National Account Management Team

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## Dallas Account Management Team

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## Moderator

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# 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.



# Disaster? You Declare, They Declare

Understand “the plans” - Yours and your customers

- Proactively Compare Plans
- Identify 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



# 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



# 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

