



Business Continuity Planning Checklist

Most disasters strike without warning. In order for your brokerage to operate during an emergency, a business continuity plan is key. This checklist enables you to consider possible scenarios that will require immediate action in order to reduce loss and mitigate risk associated with a potentially crippling situation.

Step 1: Make a plan

- > Analyze possible threats to your business, i.e., fire, tornado, hurricane, earthquake, blizzard, tsunami, server crash, data breach, theft, human error, etc.
- > Determine how your brokerage can and should respond to each threat listed.
- > Identify specific situations that put disaster plans in motion when you are facing a threat.
- > Create a “no warning” plan, should disaster strike without warning.
- > Involve your team in planning and communicate any updates to the plan as they happen.

Step 2: Consider the cloud

- > Host your management system and other applications in the cloud. Remote data centres provide optimal data protection and security.
- > Convert paper files into electronic files when possible.
- > Have one or more laptops set up to access your brokerage management system remotely.
- > Consider purchasing a wireless hotspot to connect to the Internet through your cell phone provider, should the Internet go down.

Step 3: Protect your data

- > Have multiple daily back-ups in different locations. The cloud ensures your data is automatically backed up daily and stored in secure data centres.
- > Test back-ups regularly to ensure proper functionality.

Step 4: Create a communications plan

- > Communicate to your clients through your website and social media pages. Provide contact numbers and instructions for claims.
- > Research and decide if text communication is right for your brokerage staff and clients. If so, collect cell phone numbers and look into a mass texting options.
- > Have a plan for telephone calls to be re-routed in case your phone lines are down. A third-party call center or another office outside the disaster zone should take emergency calls.

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