

DISASTER RECOVERY CHECKLIST FOR PROFESSIONAL SERVICE PROVIDERS



When something unforeseen happens—either driven by internal (theft, systems failure) or external (fire, flood, hurricane) forces—how will your business be impacted? Your ability to recover from a disaster will be far greater if you have a documented plan that outlines the basic framework for data backup and recovery as well as communication with employees and clients.



EMPLOYEE SAFETY

	OWNER	NOTES
Determine the best channel for communication to your staff. Could be text, phone, email or a team collaboration tool like Slack.		
Store employee contact information in a cloud-based system that you can access remotely.		
Establish an owner for team communication. It is helpful to assign primary and secondary roles for this task if possible.		
Do you have an emergency assistance fund that could assist impacted employees with basic necessities (hotel room, car rental, food). If so, how can you make those funds available to employees?		



PHYSICAL LOCATION

	OWNER	NOTES
Establish an owner who can access the physical location of the business to evaluate physical and/or network damage and determine safety and accessibility by employees.		
Store contact information for your building manager or landlord in a cloud-based solution so it's accessible in the event you need to report damage.		
Store all of your business insurance policy information in a cloud-based solution that you can access remotely in the event you need to file a claim.		
Establish systems and processes that support employees working remotely until it is safe to return to the physical location. Give employees laptops or tablets, use cloud-based systems so they can log-in remotely and work (if they are able), and establish a communication channel that can support remote employees (i.e. cloud-based email or team collaboration systems like Slack).		



DATA BACKUP & RECOVERY

	OWNER	NOTES
Create a data map. This is a critical component of your business continuity planning. At minimum, you need a list of all of the systems you use today, what information is stored on each system (client and business data) and who can access these systems (both as admins and as users).		
Evaluate the risk of using a local storage solution versus a cloud based system. To start, think about how your business operations would be impacted if your entire office was destroyed. Would you be able to access a backup of your data? Can you carry out basic business operations?		
If you store data locally, make sure you are storing a backup of all your data in a second, offsite secure location. Restore from your backup to test the integrity of the stored data.		
In the event of data loss, a procedure needs to be established that supports industry compliance regulations with regards to notification to clients as well as third parties.		
<p>If you have adopted cloud-based services* to store data, make sure you review security access and permissions for your staff and your clients on these systems at least twice a year. Adopting cloud-based services ensures your data is backed up and accessible by employees and clients from a browser or mobile device.</p> <p><i>*Commonly used cloud applications for professional service providers:</i> <i>Small Business Accounting: QuickBooks Online, Xero</i> <i>Document Storage / Client Portal: SmartVault</i> <i>Workflow: Bill.com, Hubdoc, ReceiptBank, Expensify</i></p>		



CLIENT COMMUNICATION

	OWNER	NOTES
<p>Determine your channels of communication to clients. These can include email, your website or a recorded phone message on your business line.</p>		
<p>Draft a basic communication strategy that you can easily execute remotely.</p> <ul style="list-style-type: none">• <i>Can you send an email to your client base?</i>• <i>Do you have the ability to record a phone message from a remote location?</i>• <i>Do you know how to update your website with an emergency message?</i> <p>The primary goal is to set expectations with clients you support letting them know if they can expect a delay or disruption in the service you provide, and whether it is safe to access your office as a result of the disaster.</p>		
<p>Establish the designated owner responsible for executing the communication strategy, and ensure the systems are in place to support the execution from a remote location. It is helpful to have primary and secondary roles if possible.</p>		