

Simple Guerilla Tactics for Continuity Planners

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Article appeared in the Business Recovery Managers Association (BRMA) Newsletter September 2002

OK. We have senior management support. Everyone agrees Business Continuity Planning is an important priority project. People even seem to like us. We've been told many times that we have very good managerial skills. We use a sugar and honey approach and try to make their job as fun as possible. We keep them informed and build the process to be as self-executing as one can without doing their work for them. We follow up on milestones and make goals and objectives very clear. But what can you do when you have followed all the rules and still some managers don't want to play? Put on your fatigues, stuff your Fedora with grass, and paint your face green; its time for some underhanded maneuvers.

Like a Guerilla fighter, you want to move swiftly and with stealth. A good revolutionary will pick an appropriate target at the right time. In other words, take these very introductory lessons and decide if they will work within your organizational environment. These actions are not intended to substitute for sound managerial technique that should always be used first, but may not be as much fun.

So when your recovery teams show up with fluorescent green pompoms and chant 'Push'em back, push'em back, waaaaay back!' outside you office, here are some tactics to consider:

Guess Who's Coming to Dinner

A business function won't get moving to complete their plan or the plan they submit is less than adequate? They don't seem to give it the time it deserves or pay any attention to your recommendations? Are phone numbers and other resources incomplete or out of date? No problem, schedule a tabletop exercise and invite a senior member of management to participate. Funny how this seems to motivate those too busy with other priorities to complete their plans. The manager to invite could be their boss (sometimes the root of the problem, though), your executive level sponsor, or their bosses' boss. May not win you a lot of points with the slackers after they answer the embarrassing questions during the exercise, so give those involved fair warning.

Fifteen Minutes of Fame

Develop a 'scorecard' on the progress of each team, stakeholder, or team leader and share its contents with peers and other managers. This little attempt at shame or competition among teams can have many iterations. In my present company, we list all of the teams and their stakeholders (usually a director or senior manager) in one column of a matrix, and various duties such as plan completed (I know, they are never 'complete'), tabletop exercise completed, plan updated, etc. Each box is color coded red, green, or yellow. A

copy is handed out to each stakeholder at our quarterly meetings. My, oh my-don't miscode something that should be green.

Another form of this trick that I have used successfully involved simply posting on the wall outside my office (where executive management would pass by) a large printed copy of my project plan so all could see each other's progress ('my green line is bigger than yours').

Have a Business Continuity Web site? Publish the same on the home page (our planning tool lists the dates of the last exercise of each team for all to see on one of the opening pages).

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At this same company, executive management wanted to review the draft plan by a certain date. One particular technology area was very resistant to completing their contribution. After excuse after excuse, and after offer after offer by me to assist them more closely, it came time to present the draft. Since I had nothing to submit for them, I simply included a blank chapter with blank template pages in the plan. Much to the technology area's dismay, management actually read the thing. Amazing how technology quickly found time to give me what I had been begging for. This worked because of the way things were done at this company and by how executive management interacted with the various components of the company (a numbers driven business). Caution: Some may view this as an inability to lead, overcome obstacles, or to produce results.

If you Schedule It, They Will Come

Maybe it is just me, or the ways and means of Silicon Valley. I never set up a meeting without all parties in concurrence that we should meet and when we would meet. One team leader kept putting off my request for a tabletop; another stopped returning my many calls and I am sure she would not answer her phone when my name appeared on the display. I needed to get tabletops completed, so I simply picked a date and sent out the invitations. All were in attendance. This works best if you can use the calendar feature of Lotus Notes. Probably helped that I invited their bosses also. Thanks Karen for the suggestion.

'Autopilot Engaged Captain'

I am often surprised that some continuity planners will include verbiage in their plan under the heading 'BCP Policy' and believe they have created an enforceable corporate set of rules. If your firm lives and dies by the policy and procedures manual, include elements in your policy that ensure budget for mitigation and other resources, requirements to develop, test and maintain plans, conduct business impact analysis, and

everything else you need or want to get done or to force others to accomplish. This may sound basic, but I have seen far too many policies that are a paragraph or two long and that really just say the company will have a plan in place. But, even a few paragraphs demonstrate management's commitment and support, right? I believe this when the policy ties managerial BCP performance to their annual raises or bonuses.

Develop BCP standards and make them a part of a formal ongoing internal or external audit process (I hate it when I get dinged on my own standards). This saves a lot of work and may carry more weight than your constant nagging.

Stop That Ambulance!

Did you feel the earthquake? Yes, timing is everything. Leverage current events. Have a set of articles ready for distribution to stakeholders or senior managers that highlight or add justification to what you want. Distribute freely lessons learned especially if the teachings are the same as your constant sermons. This is not new, or especially crafty, but begs a reminder.

Darn Thing Won't Start

What do you do when the process or project has stalled? This may apply more to the consultants in the house. One answer I received to this question is to do nothing. Maybe it stalled for good reason. Maybe you need to let it cool down and it will start in the morning. Next time, watch the gauge a little closer, sweetheart. Thanks John for the suggestion.

The Boogie Man Is Going To Get You

Remember the Joe Isuzu commercials? Lie through your teeth. Well, sort of. At least, stretch the truth a bit. Not that I would do this, but it seems to work well with lawyers and politicians. This was suggested to me by, uh, well never mind. If you need something done, blame it on an internal audit deadline ('this might come up in our audit'), or the possibility of a raise in insurance premiums (this won't happen). I have used the 'my boss will shoot me if I don't get it done' (maybe not stretching the truth too much). 'Almost everyone else is finished with their plans and I need to get these turned in.' Seriously, be real careful with this one. If it's not love or war, be honest.

Another tactic to get BCP more firmly engrained is to win over the staff by showing them that good BCP could also make their jobs more secure. A company that can resume quickly after a disaster may keep them on the payroll, but their jobs might get outsourced if resumption will take a long time. My boss puts it plainly; 'we are doing this so you will have a job after the disaster.' Thanks Chris.

Show Me – I'm From (Which State Is It?)

Somebody put something impossible, impractical, or outrageous in his or her plan? Test it. Forget this positive experience stuff. Perspiration is good. Make it fail (or eat your crow politely - but remember all the other rules of a good exercise, i.e., practical and believable).