CPOtracker Template Package

A set of companion planning documents
complimenting your CPOtracker software system

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The CPOtracker Template Package is an affordable and easy-to-use framework of documents, intended as a foundation for full-scale plan development using the CPOtracker software system, and enabling quick development of a basic business continuity plan.

The Package includes over fifty (50) pre-defined and easily editable procedures for preparedness, emergency response, and restoration activities associated with personnel and technology. It covers business processes, employee workgroups, office infrastructure, desktop and server computers, organizational data, networking, vital documents, and voice communications, and also provides tables for important stakeholder and external resource data.

The documents are user-friendly and modular by design, and intended to supplement the many CPOtracker features present in the software. You may choose to use any number of CPOtracker Template Package documents as a starting point in developing the plan, or to replace existing plan elements.

As a CPOtracker Template Package customer, you can also obtain email/voice consulting provided by a Certified Business Continuity Professional ("consultative events") to help you through any issues or challenges beyond your level of expertise. This is an attractive alternative to seeking out consulting companies that often require commitments in time and money beyond your needs or budget.

The documents provided in the Template Package can be managed as a work-in-progress by the CPOtracker system before they are completed. Upon completion, CPOtracker will manage who owns the document, when it is due for update and remind those responsible when they are due for update. All documents managed by the CPOtracker system can be included in a plan created and produced in PDF format from the CPOtracker system.

The CPOtracker Template Package provides a simple and fast document framework for building a basic business continuity plan, in conjunction with the CPOtracker system.

Summary

- ✓ An excellent companion to CPOtracker…get off to a fast start

- ✓ Cost-effective business continuity framework…outstanding value proposition

- ✓ Best-practices based…built by Certified Business Continuity Professionals

- ✓ Comprehensive…addresses all vital business system components

- ✓ Easy-to-use…intuitive document design, just fill-in-the-blanks

The following pages summarize the contents of the Template Package

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Section	Document Title	Document Description
Plan Overview	Purpose of the Continuity Plan	General description of the purpose of the plan.
	Scope of the Plan	Identifies business components that are included in this continuity plan.
	Scenarios and Assumptions	Overviews disaster versus non-disaster scenarios and also documents basic assumptions on the usability of the plan, such as availability of restoration personnel, availability of recovery locations, etc.
	Plan Access Guidelines	Documents the process for using the plan including how to access, print, upload and download documents, as well as identifying authorized recipients of the plan and their levels of maintenance authorization.
	Recovery Time Objectives	Identifies current RTO metrics (Recovery Time Objectives) for workgroups, business processes, and application systems.
	Recovery Strategy Summary	Summarizes the approaches to recovery for each business component including personnel, personal and server computers, Internet access, vital records, data, voice communication, etc.
Role Definitions	Continuity Coordinator	Identifies a business continuity coordinator (and backup) for this particular location along with their main responsibilities.
	Workgroup Coordinators	Lists workgroup coordinators (and backups), and summarizes their main responsibilities.
	Authorized Disaster Declarers	Identifies those individuals who are authorized to declare a disaster for this location, and activate the plan. Tasks and responsibilities are summarized.
	Floor Captains	Identifies floor captains for this facility and summaries their responsibilities.
	Event Assessment Team	Identifies individuals who will be responsible for conducting event assessments in determined the extent of impact to crucial business components, and describes their responsibilities.
	Emergency Notification	Identifies the overall call chain to notify employees of a disaster (workgroup coordinator to employee), and authorized external entities that will also receive notification.
	Business Components	Summarizes the assignments for the restoration of individual business components.

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Section	Document Title	Document Description
Continuity Policies	General Policies	Describes policies applicable to employees in general, with respect to their roles and responsibilities for ensuring continuity of operations.
	Plan Distribution	Policies for distributing the plan within the company, and outside of the company.
	Communications	General communication policies for all employees.
	Event Mitigation	Policies regarding the use of any then current risk mitigation or emergency equipment such as fire extinguishers.
	Lifesaving	Policies on lifesaving.
	Evacuation Related	Evacuation policies such as asset removal, risk awareness, etc.
	Disaster Declaration	The policy on declaring a disaster. Authorized persons can activate the plan.
Locations	Assembly Areas	Identifies the assembly area (and backup location) used following an evacuation, and identifies individuals responsible for roll call.
	Meeting Places	Identifies the meeting place (and backup) with directions, and the person designated for each workgroup to handle logistical issues.
	Recovery Locations	Identifies locations where personnel and technology will be recovered (DR vendor site, hotel, home office, etc.).
General Procedures	Risk Mitigation	Identifies appropriate disaster prevention and risk mitigation strategies and practices.
	Event Recognition	Provides an overview of signs of an emergency event that might lead to a disaster, and highlights roles of floor captains, and announcement verbalization.
	Evacuation	A checklist of evacuation steps.
	Assembly Area Related	Identifies the tasks that should be completed at the assembly area following an evacuation.
	Event Assessment	Guidelines and a worksheet for conducting an assessment of the impacting event to provide disaster declarers with data for making informed decisions.

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	Disaster Declaration	The general procedure for declaring a disaster broken down by role.
	Emergency Communications	Communication activities by recipient and provider, as well as media guidelines and a sample press release.
Restoration Procedures	Business Processes	Identifies restoration procedures for key business processes.
	Workspace Related	Tasks and assignments or coordinating the setup of the recovery location workspaces (furnishings, office equipment, services, etc.).
	Vital Documents	Identifies tasks and employees responsible for retrieval or reclamation of vital printed materials from the impacted facility.
	Voice Communications	Process for resumption of voice communication.
	Personal Computers	Procedure for restoring personal computers including PC profiles and employee PC usage, and home office based PC resources.
	Server Computers	Procedure for restoring server computers.
	Network Access	Procedure for restoring obtaining WAN and LAN access at various recovery locations.
	Internet Access	Procedure for restoring Internet access at various recovery locations.
Recovery Supplier	Agreement Summary	Extract of salient information from the DR supplier contract documents including term, general policies, services provided, and other agreement-related information.
	Rehearsal Testing	A generalized procedure for conducting a rehearsal test at the DR supplier location.
	Disaster Declaration	A step-by-step procedure for declaring a disaster and notifying the DR supplier.
Contact Tables	Emergency Resources	External emergency services and resources that would be utilized following an impacting event (law enforcement, fire department, hospitals, transit services, lodging, and similar).
	Local Employees	Details for all employees including emergency contact information.

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	Remote Employees	Key remotely-located employee contact information (email, cell, office phone, etc,).
	Key Clients	Key clients that would be notified and have a need to know about any impacting event.
	Business Partners	Key business partner contact information.
	Key Stakeholders	A table of stakeholders in the company including external governance, regulatory oversight, etc.
	Time of Disaster Suppliers	Lists time-of-disaster supplier or other suppliers of essential products and services.
Plan Maintenance	General Procedures	Procedure for maintaining the plan.
	Open Items	Lists all open items requiring plan updates. Note that the team site can be used after the initial plan is in shape.
	Closed Items	Lists all maintenance performed on the plan.
	Workgroup Drill	Procedure and recommendations for conducting a workgroup drill.
	Technology Rehearsal	Procedure for conducting a technology rehearsal (possibly using a DR supplier).
	Personnel Rehearsal	Tests for the ability of end-user connection to restored systems.
	Rehearsal Status	The status of all rehearsals.