5 Checklists for

Jumpstarting Your Business Continuity Planning

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ARMADA

Please note: This ebook and any associated use of it by your organization is NOT a substitute for advice from a health care provider, insurance agent, attorney, and/or government agency.

Introduction

These checklists walk you through several important early steps in jumpstarting your planning for business continuity during an impending threat resulting from external business interruption. This approach stems from a fundamental belief expressed best in a quote from Peter Coy and Neil Gross as the current century approached:

> *"Forecasters who extrapolate from today inevitably get tomorrow wrong…(but) by pitting multiple scenarios of the future against one another and leaving many different doors open, you can prepare yourself for a future that is inherently unpredictable. Brainstorming pays off. And the more possibilities you can entertain, the less likely you are to be blindsided."*

Brainzooming and Armada Corporate Intelligence

For more than a decade, Brainzooming and Armada Corporate Intelligence have partnered to create unique intelligence- and innovation-focused strategies and insight reports for global clients across industries.

Brainzooming

The Brainzooming Group focuses on producing better business results for clients in a hurry. The tested Brainzooming Method comprises an array of strategic and creative thinking tools to expand client business possibilities, quickly turn great ideas into straightforward strategies and tactics, and lead to strong implementation results.

Armada

Founded by Keith Prather and Chris Kuehl in 2000, Armada executives combine their fundamental roots in corporate intelligence gathering, economic forecasting and strategy development to function as trusted strategic advisors to business leaders.

Jumpstart Checklists

We've prepared these checklists to jumpstart your continuity planning

- Checklist 1: Planning and Implementation Principles
- Checklist 2: Picking a Team Leader and Backup
- Checklist 3: Demand-Based Impact Assessment
- Checklist 4: Assembling Focused Response Teams
- Checklist 5: Enabling High-Performing Partners

Want Help Taking Your Planning Further?

Brainzooming and Armada are partnering to help you quickly move through these checklists, identifying critical success factors, priorities, and actionable tactics. Click here to learn more.

Checklist 1: Planning and Implementation Principles

As you jumpstart your planning activities for a widespread, disruptive external event, let these principles guide you:

☐ **Identify a leader and a backup leader right away**. This two-person team will coordinate planning and keep the organization on track.

☐ **Perform a quick, thorough, and current situation assessment**. You need to know where you're starting from, both internally and externally. Assemble a relevant, diverse team and perform a strategic impact assessment for the organization. Identify the most critical challenges and opportunities you can envision for your organization.

☐ **Employ relevant strategic thinking exercises**. Help the team(s) think flexibly and creatively by providing exercises that help them to efficiently explore possible challenges, opportunities, multiple potential scenarios, and a menu of implementation alternatives and backups.

☐ **Create simple, flexible plans**. Use plans that lay out a few important steps and identify key participants and roles. Stand up a centralized information hub and use quick, regular meetings focused on actionable next steps to push quickly toward successful implementation.

☐ **Communicate simply and clearly** – As you share plans broadly within the organization, ask, "What are the three things we need this audience to know and do?" Enforcing the three-item rule will better help translate the plan into straight-forward guidelines and consistent actions by your employees and other audiences.

☐ **Think broadly about potential collaborators and partners –** In any period with significant uncertainty and rapid change, every organization will be rethinking its situation. As you do that for your organization, reach out to both traditional and unconventional organizations (even competitors) as possible collaborators.

Checklist 2: Picking a Team Leader and Backup

You need to select a leader who can focus on business continuity, plus command the attention and secure the resources to align your organization with the appropriate level of attention, intensity, and speed. These individuals will play roles that require them to be both strong strategic thinkers and adept at leading and implementing time-sensitive initiatives.

As you explore the range of potential individuals to fill these roles, use this checklist to assess their relative strengths and potential for success:

Desirable Leadership Characteristics

☐ Displays strong strategic thinking leadership capabilities

☐ Displays strong project management leadership skills

☐ Enjoys and maintains strong relationships throughout the organization

☐ Enjoys the respect of leaders within the organization

☐ Readily works in a collaborative style

☐ Is oriented toward implementation

☐ Actively communicates with key audiences

☐ Is decisive on strategic and tactical questions

☐ Has experience in business continuity planning / situations

☐ Can be immediately reassigned from current responsibilities

Potential Leadership Candidates	Characteristics Score (Out of 10)

Select a Lead Project Manager: While the leaders need project management skills, it's smart to also select a dedicated project manager who is a strategic thinker. This person will drive the detailed timeline, coordination implementation updates, and manage scheduling.

Checklist 3: Demand-Based Impact Assessment

Relative to the spread and impact of coronavirus disease 2019 (COVID-19), make a quick assessment of your business situation based on the potential market demand impact on your organization. Will your organization experience increased demand for your goods and services, temporary declines in demand, or potentially complete shutdowns?

This quick assessment will help you determine the course of your planning and implementation:

Exercise - Ask: *What is the most likely impact scenario for our organization? What are our initial expectations about the implications based on our assessment?*

Business Impact Scenario	Demand Factors	Example Organizations	Initial Implications
Increasing demand	• Importance relative to combatting pandemic • Greater demand based on changes resulting from pandemic • Potential surge demand (before, during, and/or after pandemic)	• Medical supplies • Personal consumables • Medical services • Internet providers • Delivery services • Grocery stores and pharmacies	
Lessening demand	• Customer moving away from the brand/market for prevention or protection purposes • Customers limiting discretionary costs	• Travel modes • Lodging • Retail stores • Travel-related products • Event planners / conference producers • Amusements / attractions • Learning institutions	
Potential pivot opportunities	• Able to shift focus to serve as a new type of resource • Fill an emerging need during the pandemic	• Software / app development • Online entertainment • In-home entertainment • Business services	
No impact on demand	• Don't expect to see significant changes in business levels • Customer demand will remain stable • No significant surges expected	• Banking • Financial services • Personal consumables	

Which scenario or scenarios is your organization facing? What are the initial implications, per your assessment?

Checklist 4: Assembling Focused Response Teams

Based on our experience and interactions with organizations adept at developing and activating business continuity plans, this checklist provides a starting point for identifying the individual planning teams and participants you need to jumpstart your business continuity planning and implementation.

Decide which planning focus and process owners to involve in your planning. Then, identify key participants with diverse perspectives and strong strategic thinking and implementation skills.

Planning Focus	Process Owners	Key Participants
☐ **FINANCIAL MANAGEMENT**	☐ Finance	
	☐ Accounting	
	☐ Purchasing	
	☐ Legal	
	☐ Forecasting	
☐ **REVENUE GENERATION**	☐ Sales	
	☐ Marketing	
	☐ Pricing	
	☐ Information Technology	
☐ **INFORMATION TECHNOLOGY**	☐ Technology	
	☐ Security	
	☐ Human Resources	
	☐ Disaster Recovery	
☐ **OPERATIONS MANAGEMENT**	☐ General Management	
	☐ Supply Chain	
	☐ HR	
	☐ Legal	
	☐ Purchasing	
	☐ Information Technology	
☐ **SUPPLY CHAIN**	☐ Supply Chain / Transportation	
	☐ Leadership	
	☐ Purchasing	
	☐ Supplier Relations	
	☐ Sales	
	☐ Marketing	
	☐ Information Technology	
☐ **EMPLOYEE HEALTH (Illness Prevention and Protection)**	☐ Human Resources	
	☐ Communications	
	☐ Information Technology	
	☐ Legal	
☐ **CUSTOMER SERVICE**	☐ Customer Service Center	
	☐ Online	
	☐ Social Media	
	☐ Information Technology	
☐ **EMPLOYEE ENGAGEMENT**	☐ Human Resources	
	☐ Benefits	
	☐ Communication	
	☐ Information Technology	

Planning Focus	Process Owners	Key Participants
☐ **CUSTOMER ENGAGMENT**	☐ Marketing	
	☐ Sales	
	☐ Communications	
	☐ Information Technology	
☐ **COMMUNITY ENGAGEMENT**	☐ Government Relations	
	☐ Community Relations	
	☐ Communication	
	☐ Social Media	
☐ **INFRASTRUCTURE**	☐ Facilities / Properties	
	☐ Travel & Movement Policies	
	☐ Human Resources	
	☐ Security	
☐ **INNOVATION & AGILITY**	☐ New Product Development	
	☐ Marketing	
	☐ Engineering	
	☐ Information Technology	

Checklist 5: Enabling High-Performing Partners

In addition to their core areas, businesses have both upstream and downstream partners.

- *Core areas* include your physical spaces, people, and technology, among other assets.
- *Upstream activities* include all the business inputs and influences that shape how your business organization performs.
- *Downstream activities* are the parties that are in fulfillment roles. These include partners within the supply chain, distribution and sales, and delivery, in addition to your customers.

While you drive planning for your organization, you can't exclusively plan and implement in isolation, particularly during times when business continuity is under pressure. You need to ensure you are creating situations in which it's easy for audience members to perform at high levels when interacting with your organization.

Enabling High-Performing Partners

Use this checklist of questions so that your planning maximizes success for everyone you'll depend on to carry it out:

☐ What do participants know right now, and what do we need them to know?

☐ What strengths do they already have that will boost success?

☐ How can we compensate for any weaknesses by changing the process or providing other resources?

☐ How can we design the process to keep them engaged (mentally, emotionally, socially, physically, etc.) as long as necessary?

☐ Are the participants similar, or do some have materially greater or lesser likelihoods of success?

☐ In what ways can we involve participants with the highest likelihood of success to shape and/or help carry out the process for others?

☐ In what ways will other processes they are involved with impact success levels?

Your answers are tremendously helpful in thinking about planning and processes from the audience's perspective. This checklist will help you develop an implementation plan that enables greater success.

Want help to quickly activate these checklists with your team to advance toward implementation?

Brainzooming and Armada have paired up to provide a solution. Contact us to schedule a Business Continuity Jumpstart online workshop where we'll:

- Share a coronavirus update tailored to your industry, along with an opportunity for Q&A

- Lead your team through Brainzooming exercises to identify critical success factors for your preparation and implementation performance

- Help you focus on priority areas to address within your organization

- Collaborate with you to identify potential implementation tactics to shape your plan

Your online workshop will accommodate a broad, diverse team from your organization participating remotely in a highly-focused, productive setting.

If you need the additional boost to jumpstart, reach out right away at info.brainzooming.com/business-continuity-workshop or via email to mikeb@brainzooming.com.

We'll follow up to confirm the details and set a time that works for your team.

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