


Generally Accepted Practices Workshop



ACP Washington- 10-18-06

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Agenda

- Overview
 - Background
 - Mission Statement
 - GAP Team structure
- Roadmap
- Process
 - Document Layout: <http://www.drj.com/GAP/>
 - Document Update
 - Marketing Opportunities
- Workshop
 - GAP focus on Subject Area 8
 - Brainstorming
- Closeout and Discussion of Next Steps

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Background: Mission Statement

- "To be recognized as a leading source of 'sound' Generally Accepted Practices by providing a depository of knowledge and recommendations offered by skilled business continuity practitioners."

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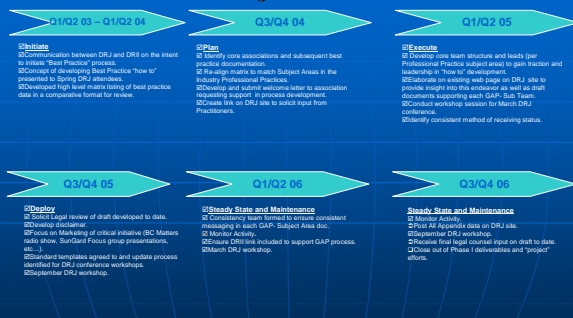
Background: GAP Team Structure

- Individual GAP- Subject Area Teams
 - Brainstorm with Practitioners (on a bi-weekly or monthly basis) to develop GAP data per Subject Area.
 - Feedback from "the field".
- Core Team
 - Provide direction on templates and structure.
 - Team Leads to support individual GAP Subject Areas.
 - Meet on a monthly basis to discuss next steps.
- Consistency Team
 - Responsible for ensuring consistency from a reference perspective from one team document to another.
 - Responsible for the final roll-up of the document.

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Background: Roadmap

Phase I: High Level Review



Q1/Q2 03 – Q1/Q2 04

- Sign-off**
 - Communication between DRJ and DRI on the intent to initiate "Best Practice" process.
 - Concept of developing Best Practice "how to" presented to Spring DRJ attendees.
 - Developed high level menu listing of best practice data in a comparative format for review.
- Plan**
 - Identify core associations and subsequent best practice documentation.
 - Finalize criteria to match Subject Areas in the Industry Professional Practices.
 - Develop and submit national letter to association requesting support in process development.
 - Create link on DRJ site to send input from Practitioners.
- Execute**
 - Formalize core team structure and leads per Professional Practice subject areas to gain traction and leadership in "how to" development.
 - Elaborate on existing web page on DRJ site to provide insight into the process as well as form documents supporting each GAP, Sub Team.
 - Conduct working session for March DRJ conference.
 - Identify consistent method of reporting status.

Q3/Q4 05

- Deploy**
 - Conduct final review of draft developed to date.
 - Develop disclaimer.
 - Focus on Marketing of critical initiatives (BC Matters risks show, SurCard Focus group presentations, etc.).
 - Standard templates agreed to and update process identified for DRJ maintenance workshops.
 - September DRJ workshop.
- Ready State and Maintenance**
 - Consistency team formed to ensure consistent messaging in each GAP, Subject Area doc.
 - Monitor Activity.
 - Ensure DRI link included to support GAP process.
 - March DRJ workshop.
- Steady State and Maintenance**
 - Monitor Activity.
 - Post All Appendix data on DRJ site.
 - September DRJ workshop.
 - Receive final legal counsel input on draft to date.
 - Close out of Phase I deliverables and "project" efforts.



Q1/Q2 06

- Ready State and Maintenance**
 - Monitor Activity.
 - Post All Appendix data on DRJ site.
 - September DRJ workshop.
 - Receive final legal counsel input on draft to date.
 - Close out of Phase I deliverables and "project" efforts.

Q3/Q4 06


- Ready State and Maintenance**
 - Monitor Activity.
 - Post All Appendix data on DRJ site.
 - September DRJ workshop.
 - Receive final legal counsel input on draft to date.
 - Close out of Phase I deliverables and "project" efforts.

Not Started In Progress Completed
 Generally Accepted Practices

Background: Roadmap (cont)

Phase II: Industry/Vertical Application





Q1/Q2 07

- Initiate**
 - Formalize existing structure as the foundation for vertical application.
 - Identify Industry Practitioners from the Healthcare, Manufacturing vertical as pilots to begin development.
 - March DRJ workshop session.
- Plan**
 - Develop core team and leads for verticals focus.
 - Elaborate on existing web page.
- Execute**
 - Initiate successful vertical data using established process.
 - Continue steady state operations and close out formal "project" effort.
- Deploy**
 - DRJ workshop.
- Ready State**
 - Monitor Activity.
 - Close out of Phase I deliverables and "project" efforts.

Q3/Q4 07

- Ready State**
 - Monitor Activity.
 - Close out of Phase I deliverables and "project" efforts.

Not Started In Progress Completed
 Generally Accepted Practices

Process: Document Layout

- Sub Topic
 - Phased Approach
- Item Number
- What
 - What are the requirements per phase?
- How
 - How can these requirements be executed?
- Point of Reference
 - What reference material is needed in order to drive this to success?

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Process: Update

- Feedback:
 - DRJ Conference Workshop
 - 10 tables of 10 Practitioners representing the 10 GAP-Subject Areas
 - Online Feedback contact: Lori_J_Yelland@comerica.com
- Next Steps:
 - Individual Sub Team Review and Approval
 - Core Team Review
 - Consistency Team Review

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Process: Marketing Opportunities

- BC Matters Radio Show
- SunGard User Groups
- ACP Sessions
- DRJ Conferences
- DRJ Articles

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Workshop

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Brainstorming- GAP Subject Area 8

- Maintaining a Quality Review Program
- Exercising: Overview
- Exercising: Discussion Based
- Exercising: Operations Based

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Closeout

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Closeout- GAP Subject Area 8

- Summary of Results
- Expectations for Next Steps
- Communication of Results:
 - ACP membership
 - GAP Core Team

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Thank You

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