

EXERCISE Template

# Template Overview

Business continuity and IT disaster recovery plans should not be considered viable unless exercised, and, excluding a real world event, tests are the best form of training for your response and recovery personnel.

The purpose of this Exercise Template is to guide you through the development and effective execution of a wide range of business continuity exercises, including developing and documenting exercise plans and objectives, evaluating the results of each exercise against the documented objectives, and documenting lessons learned (Corrective Actions) to ensure they are prioritized, addressed, and completed – not forgotten.

This fully editable and customizable template jump starts your exercise planning effort by offering a sample structure and guidelines. Edit the template as needed to customize for your organization and unique needs.

# Catalyst Automates Your Program

This template is from Catalyst [business continuity software](https://avalution.com/business-continuity-software). Please review the last page of this document if you’re interested in learning how your plans can be activated and used in real-time when built in Catalyst.

Catalyst provides comprehensive, yet easy to use, business continuity and IT disaster recovery planning functionality to prepare organizations for disruptive incidents. Designed for the global enterprise organization, Catalyst scales to address the needs of any organization – regardless of size, industry, or geography. With Catalyst, business continuity planning is simple, scalable, and actionable – for both the program manager AND end user.

## NEW FEATURE: THE CATALYST PORTAL

Do you struggle with getting employees engaged in business continuity? The Catalyst Portal enables you to easily distribute plans, update contact information, and share the latest about a disruption while leveraging content that’s tailored to each employee.

# Ready to Learn More?

If you would like to see Catalyst in action, please [**book a meeting**](https://info.avalution.com/connect-with-our-catalyst-team) with our team.

We look forward to connecting with you!

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# Cover Page

**Title:** [Insert]

**Description:** [Insert]

**Owners:** [Insert]

**Contributors:** [Insert]

**Last Updated:** [Insert]

**Last Approved:** [Insert]

**Status:** [Insert]

# Introduction

[Explain the purpose of the exercise and provide an overview of how the exercise will be completed]

# Test Type

[CHOOSE THE TEST TYPE THAT MATCHES THIS EXERCISE. DELETE THE REST, INCLUDING THIS LINE]

## The Walkthrough Test

Team members meet to verbally rehearse the steps of every component of the recovery plan. This is a good first test to identify any glaring gaps in the protocol.

## The Simulation Test

During the simulation, rehearse notification procedures and temporary operating procedures, and verify your backup and recovery operations. Validate all hardware, software, and personnel involved in addition to your voice and data communications.

## The Parallel Test

The purpose is to process historical transactions – like yesterday’s data records – against the preceding day’s backup files. The reports generated at the alternate site should agree with those produced at the existing processing site.

## The Live Usage Test

This type of test involves disabling production resources (facilities, applications, suppliers, people, etc) and instead exclusively using backup resources. This often means operating applications from a backup data center while also relocating people to alternate sites. Extra care should be taken to not affect business operations!

# Exercise Scope

The following plans will be exercised:

* [Insert Plan 1]
* [Insert Plan x]

#  Participants

The following individuals have been identified for participation in the exercise:

| Role and Responsibilities | Primary Members | Alternate Members |
| --- | --- | --- |
| Facilitators  |  |  |
| Participants  |  |  |
| Observers |  |  |

# Test Activities

 The following table contains a high-level overview of the testing activities:

| # | Title | Role |
| --- | --- | --- |
| 1 | [Insert Task 1][Insert Description]  | [Insert] |
| 2 | [Insert Task X][Insert Description]  | [Insert] |

# Test Objectives

| Title | Success Criteria | Evidence Requirements | Mandatory? |
| --- | --- | --- | --- |
| [Insert] | [Insert] | [Insert] | Yes / No |
| [Insert] | [Insert] | [Insert] | Yes / No |

# Exercise Results

 [Insert summary from participants and observers]

####  Strengths

* [Insert Strength 1]
* [Insert Strength X]

#### Key Opportunities for Improvement

* [Insert Improvement Opportunity 1]
* [Insert Improvement Opportunity X]

# Post Test Results

## Action Items

|  Action Item | Owner |
| --- | --- |
| [Insert Action Description 1] | [Insert] |
| [Insert Action Description X] | [Insert] |

# History Log

| Version | Date | Action |
| --- | --- | --- |
| 1 | [Insert] | [Insert] |

#

# **the easiest way to automate your BC program**

**Ditch Word and Excel to accomplish more than you ever thought possiblE**

Automate Administrative Tasks: Catalyst automates BIA and Plan update reminders and approval reminders, while simplifying program management tasks, so you can focus on activities that will move the program forward.

EASILY ENGAGE Everyone: Do you struggle with getting employees engaged in business continuity? The Catalyst Portal enables you to easily distribute plans, update contact information, and share the latest about a business disruption while leveraging content that’s tailored to each employee.

Enable Effortless Analysis: Catalyst automatically integrates all data entered into the system so you can easily view upstream and downstream dependencies, recovery gaps, and risks across the organization.

Generate Metrics That Matter: Catalyst automatically generates program metrics that allow you to quickly understand the status of your program, identify critical risks, and drive meaningful engagement with stakeholders and increase support.

Create Consistent Processes: Catalyst provides the flexibility to capture unique data, while maintaining the capability to develop templates that ensure consistency across your BIA and planning efforts.

# Ready to Learn More?

Book a meeting with our team to see how Catalyst will automate your program and save you time.

[**BOOK A MEETING**](https://info.avalution.com/connect-with-our-catalyst-team)

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As the largest provider of business continuity management solutions – spanning consulting, software, managed services, and staffing – Castellan is uniquely positioned to help clients find the right balance of risk tolerance and resilience to protect their employees, brand, and bottom-line. Leveraging a proprietary proven process for driving business continuity success, Castellan partners with clients to establish a clear vision, drive real results, and provide on-going support from their community of business continuity experts. Castellan helps clients replace uncertainty with confidence. Now you’re ready.TM

For more information, visit [**castellanbc.com**](https://castellanbc.com).