

Selling Your Business Resumption Plan to the OTop Dogs: o Itœes Not : Tough as You Think, Part 1



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If you are a mid-level manager trying to Osello your disaster recovery plan in thornor executive office, you know ito tough to make that pitch. Leo Wrobel shows you how to lay out the project, get to yur ultimate goal quickly (commitment, funding, hiring or whatever), and devise a presentation that will maIyour boss an Ooffer he can refuse.c

Probably the most frustrating experiences at the workplace are those in which you lve the responsibility for a problem or issue but not the authority to correct it. If there is one characteristi I have noted in my 25 years of writing disaster recovery plans, it is this one. Indeed, I thought business resumption planing involves addressing global business issues, which oftentimes are far above the recovery plannerœes normal sphœ of influence. To use the vernacular, OThese issues are above my pay grade

If you are a mid-level manager trying to Osello your recovery plan in the corner œcutive office, perhaps you will glear a nugget or two out of this series. You see, I have had it both ways. I know what feels like to make the pitch, and now what it feels like to be the one pitched

Early in my career as an analyst, I was tasked with making that Ostand-up preserono in the corner office to a buncI of scary executives and bosses. Later, in private practice as a business resumptionI planning consultant, I had to make presentations like these againnn and againnn and again. Well, practice makes perfect. Any consultant worth his or her salt knows there are some things you can do in the corner office where they onsider you a genius. Sometimes they laugh and slap you on the back. Other things, however, will make them screamoller, bang the table, and threaten to withhold your check. You learn very quickly to avoid anything that coibutes to the latter and avoid œ meltdown.

A Restaurant Analogy

How does one get through to a corner office executive whose attention span for youtopic is measured in microseconds? It starts with establishing trust with the executive, and thatœes nœways easy for the technologist

Let me answer this question by explaining it in a somewhat novel wa

Question: Where do you get absolutely the best food in the world?

Answer: Generally speaking, it is at your momœes hou:

Go with me on this one. I intend to make a poinI

I grew up in a large Polish/Italian family. The food was good, and there was plentof it. In fact, there was never any question that it was good. Word spread, and after a while most of my friends discovered that Saturday night was pizz night at the Wrobelœes and they all came over*often*.

Having established that point, let me ask another question

Question: Where do you go to eat something that nobody in their right mind would normally œ?

Answer: A French restaurant

I have eaten some pretty bizarre entrees in a French restaurant that I would never have consciously chosen to buy at my local supermarket. But they were displayed with exquisite sauces and presentation that I ate and enjoyed them very much. Also, considering the fact that a meal for two was \$250, I had darn-well better have enjoyed it.

So what does this analogy mean in terms of establishing trust with your executive boss? It means *they trust outside consultants more than you*. Consider the following:

- You know the food is so good at your mom's. You have had a longstanding business relationship with your mom. In other words, *you* know her food is good from firsthand experience.
- I might not be so inclined to eat at your mom's house because I would not have that firsthand experience. God only knows what your Mom might serve me.
- Both of us could probably come to an agreement on the French restaurant. After all it's so expensive *it has to be good*. This is, in a strange way, how management acts and why they retain outside consultants instead of trusting you.

In the case of disaster recovery, you are effectively assuming the role of mom. You know you are a great cook and that you have the right recipe. You are more than ready to dish up something healthy and good for the organization's business impact analysis and a disaster recovery plan. Nevertheless, executive management does not have the trust relationship with you yet. They will be reticent to believe you know how to cook up a plan, in much the same manner that I may not want to eat at your mom's house.

So instead management will opt for the equivalent of the French restaurant. They will hire a \$350 per hour consultant to tell him or her things that you already know. Like the French restaurant, the consultant is so expensive that he *better* be good.

But why can't they believe *you*? The fact is, they can.

The manner in which the French restaurant or the high-priced consultant justifies earning the big bucks is the same. They are both experts at *presentation*. It is safe to say that the extra expense of the consultant is not justified if your company has good cooks on staff but does not trust them. This is why you must convince management that you are a master chef. You do that in the executive presentation.

A lot of work must be undertaken before you get to that all-important presentation. Let's explore a few tips in this article for laying out the project, getting to your ultimate goal quickly (commitment, funding, hiring or whatever), and devising a presentation that will make your boss an offer he can't refuse.

First and Foremost: Finding the TIME

Katrina. Rita. Ike. Even after the spate of recent disasters, trying to get disaster recovery planning to executive management can be challenging. Immediately after a well-known disaster, organizations typically get back to business as usual rather quickly, forgetting what happened or what they were going to do about it. This is typical of human nature, and it is illustrative of why it is important to execute when the concept of business resumption planning is still a focus of attention.

Even at times of relatively high interest, management is reticent to *fund* the effort and to commit financial or personnel resources. This leaves technologists like us to use a guerrilla approach that primarily involves surfing the web and scouring libraries for inexpensive solutions. It also involves tackling the project largely as a kitchen table work in the evenings, mainly because your regular daily responsibilities do not go away and, God forbid, this project might involve hiring staff. So how does one convince management to authorize hiring and other expenses to get the job done? You can employ a few proven tactics to do this. First: Believe it or not, management is not bashful about spending money on disaster recovery.

I realize you are skeptical. So was I. Early in my career when someone asked me to describe management's attitude about funding disaster recovery, I used to quote that old Three Stooges routine:

Moe: OIf you had a dollar, and your father gave you a dollar, how much would you have?

Larry: OOne dollar.

Moe: OYou don't know your arithmetic.

Larry: OYou donœt know my fath

Change the word Ofathero in the joke to Omanagero or Oboss,o and I think you 'e the similarity

Notwithstanding the levity, it is possible to get your disaster recovery planning fort funded. If you know how to speak in terms that management uses (sorry, but this group is not going to learn your temical terms), you can bring into play the recent rash of mega-disasters to advance your disaster recovery plan and gt it funded. In fact, you can use the same concept of speaking to management in terms they understand to justify mosany capital outlay. Letœs look how to, and how not to, ask the boss for money

Using Meaningful Data to Get Your Plan Funded

The first step in the process is a preliminary BIA. BIA is not a branch of the federal government that does cover security work, nor is it a medical procedure that youœre too embarrassed to ment to your family or friends. A BIA is a *business impact analysis*. It is an examination and determination of the impact of a catastrophe on a particular company or organization. Another way of saying it is that a BIA is the process of aalyzing all business and/or production functions and the effect that a specific disaster may have upon them (se [Figure 1](#)). Note, however, I saic a Opreliminaryo BIA. You will not have the time or resources to complete a full-blñ BIA, nor would you want to at thi point. Remember, what you are trying to do is get executive support, buy-off, fundig, and personnel. Once you have those four things, you can get whatever else you need to achieve your goal!

The preliminary BIA process can include, but is not limited to

- High-level review of critical business processes and interdependencies between depatments and divisions
- Assessing the impacts of an extended business or production outage. What does an hor of downtime cost by department or division?
- High-level determination of the most time-sensitive processes, functions, applications, groups/departments, and work areas. This includes quantifying the maximum amount of time that a system can be out of service without severely affecting the companyœs or organizationœs revenue flow, produc or services.
- A rough but reliable estimate of how much revenue and productivity would be lost your organization were unable to conduct business for a prolonged timeframe

Suffice it to say that if you have the luxury of sufficient time and budget, you cœ do a very detailed analysis, which is always preferable. In all probability, both of these commodities will be limited. Tis is why we recommend a *preliminary BIA*, whereby you collect only the most critical morsels. This data in turn is used to substantiate the need thereby funding future project phases that will require the support, funding, and edorsement of the executives.



Figure 1 Flow chart of a typical business impact analysis:

Excerpted from Disaster Recovery Planning for Communications and Critical Infrastructure

Additional Observations on Using the BIA to Pitch Management

Let me share a few more points as to why the preliminary BIA may be the most importnt part of your plan

- First and foremost, you will not secure support and funding for an expensive and tie-consuming project unless management knows what you are trying to protec
- Katrina and Rita are old news, but who knows what will happen by the time this ale publishes? Will *you* have a plan in 2011 because of the events of 2010? My experience says Omaybe.o Barring me cataclysm between the time of writing and when you read this, count on Osellingo disaster rœvery to be an uphill battle in your organization

I base my somewhat pessimistic assessment on personal experience.

In 1991, I was asked to come to Tel Aviv Israel to teach a seminar about disaster recovery planning based on one of my books. My first reaction was shock. It seemed to me that the Israelis should be teaching *me*, not the other way around. The prospect of going to the Holy Land was absolutely intriguing to me, so I accepted the assignment.

I arrived only three months after the start of the first Gulf War. The locals told me that if I had arrived only days earlier they would have given me a gas mask to wear at Ben Gurion Airport. I also met many wonderful friends after my arrival, and for most of them the memory of taping up plastic to create a safe room in their homes (from poison gas attack) was clearly a very recent memory.

After going to work, I was greeted by a number of highly educated and technically savvy Israeli nationals who had believed the recent war was their ticket to a most profitable seminar. After all, what could be more compelling to the Israeli financial community and all the banks that operate in Tel Aviv than a war? Even after 9/11, we as Americans are relative lightweights in comparison to what these folks have had to endure. Most of the people I met actually saw the Scud missiles come down. I got to see *where* they came down.

Contrary to what was being reported on CNN and other media (that the missiles were falling into the desert or being shot down by Patriot missiles), I saw three missile craters. They all hit the center of the city. One was where an apartment building used to stand. Each crater was undoubtedly a most compelling advertisement for contingency planning.

Interestingly enough, the people who were hosting this seminar told me that when they telemarketed the seminar, the most common response they got was "Oh, that will never happen to me!" Ultimately, only 44 people signed up for the seminar. For me I was delighted; that's a pretty good turnout by U.S. standards! The local seminar hosts literally expected hundreds to attend.

What does this little story tell you about human nature? What does it tell you about what to expect when you try to sell disaster recovery to someone who has *not* recently been in a war? I suppose it tells you that even the most visible and widespread disasters become almost passe with the passage of only a relatively short time. It was then when I realized the human aspect of trying to sell disaster recovery in this context that I realized I had better learn a lot more about selling the concept!

Still, all is not hopeless. In fact, management needs only four things to support and fund your effort. These include:

- What can happen?
- What is the percentage of probability that it can happen?
- What does it cost when it happens? (Think both productivity and sales)
- What does it cost to make the problem go away?

As you can probably deduce, the devil is in the details. And it's precisely the details you will find in Part 2 of this series.
