STRATEGIC BCP®

The BCM Professional's Playbook:

Five Steps to BCM Customer Satisfaction

Whether you work as a consultant or an in-house BCM professional, viewing the people you work with as "customers" can go a long way toward changing the dynamic of how business continuity is viewed within the organization. It can elevate perception of the process from that of a "necessary evil" to that of a strategic business tool.

It doesn't really matter whether those individuals perceive themselves as being customers, or not. What matters is how they perceive your involvement, and the impact of your BCM-related work, in the context of their jobs.

Changing the dynamic of how you approach your dealings with them can change their perspectives of the value you have to offer and of their incentives to participate.

With that in mind, here are a few ideas you can apply to any business continuity planning and management process—regardless of your current methodology or whether you execute it through word processing documents, spreadsheets, or specific BCM software programs.

1. Identify and classify your "customers."

Certainly, your immediate supervisor and other top-level executives are important people to please. But expanding the definition of "customer" to department heads and other contributors can enhance the cooperation you need to achieve your BCM objectives.

The bottom line is that your relationship with these customers will ultimately impact the "perceived" value of your plan. That holds true just as much for those who provide input as it does for those who will review, approve, and act upon the plan.

How well they buy into your data-gathering approach can determine their level of cooperation and your ultimate level of BCM success. So make sure to consider their perspectives and feelings in how you approach their participation and how you communicate your resulting strategy.

Game-plan checklist:

- ☑ Identify input-contributing customers.
- ☑ Identify outcome-reviewing customers.
- ☑ Itemize issues and concerns for key customers within each group.
- ☑ Identify and understand interdependencies among departments and functions that can affect each of your customer groups.

2. Reframe customer perceptions.

It is not unusual for companies to view business continuity survey taking and document generation as "necessary evils." But what if you could change that by starting to think like your customers and redefining your process in terms that benefit them?

For those customers supplying input, let them know how the information they provide will help them, their job function, and their department. For example, how you document the importance of various IT system investments, relative to their value in supporting key business processes, can help a technology manager justify new expenditures for system upgrades.

For your executive customers, don't stop with the housekeeping details of recovery. Consider complementing your BC plan document with an executive overview supplement. That will let you use your data-gathering insights to add operations perspective to issues of concern within the executive suite—growth, acquisition, profitability, liability, downsizing, etc. More important, it can help to upgrade perceptions on the value of BCM.

Remember, you might be the only person looking at that level of detail in all business processes across the organization, so you are the one with the best ability to see the full impact of cross-function, cross-departmental influences.

Game-plan checklist:

- ☑ Expand your knowledge and vocabulary to be able to communicate from each customer's perspective.
- ☑ Identify and prioritize interests for each unique customer audience.
- ☑ Communicate potential customer benefits to be gained from requested input.
- ☑ Address strategic expectations, as well as your BCM expectations.

3. Simplify the process for them.

The long form survey can be the death knell to audience participation. They might complete it, but the longer the process takes the more likely it becomes that survey fatigue will turn quality input into short answers and missed opportunities.

You can gain more detail and better insight in an open-interview process if you are sufficiently prepared to keep it short—an hour or less. The best way to make use of customer time is to familiarize yourself with the involved processes as much as practical before the interview or survey.

You don't have to do that for every function throughout the company. Selectively identify a few key processes—in sales, in IT, in facilities management—and invest your time in gaining an insider appreciation of what's involved. Discover the difference that immersing yourself in their process can make. It can improve both the quality of plan input and your understanding for better plan development.

Game-plan checklist:

- ☑ Observe processes independently, in advance, or research external resources.
- ☑ Take advantage of casual contacts with department employees to glean business concerns.
- ☑ Let your input resources tell the intangible aspects of processes as well as the tangibles of equipment and assigned personnel.
- ☑ Try a two-stage process of capturing data quickly, organizing it on your own, then revisiting your customer for confirmation.

4. Return the favor.

Do more than just ask organizational "customers" to share information about their departmental processes and resources. Return the favor by giving them a greater appreciation for the benefits they can obtain from your processes as well.

People are more likely to participate when they appreciate the context of the process and their role in it. So give them reasons to become better allies in your efforts by instilling confidence in your processes and outlining their potential payback to the organization as well as the individual customer.

Game-plan checklist:

- ☑ Identify and communicate the analytics and metrics used to quantify risk and impact.
- ☑ Show customers how to build objective RTOs instead of simply asking for gut-instinct predictions.
- ☑ Show how industry BCP regulations, standards, and best practices contribute to building a better BCP plan.

5. Demonstrate value.

In everything you do, look for opportunities to demonstrate the value of your function and your work to your customers. That starts with your interactions among departmental input providers and managers and extends all the way to executive involvement in plan exercises.

Wherever possible, let people see that BCM has just as much value for improving "what is" as it has for dealing with "what if." Place as much emphasis on proactive risk management as on reactive disaster recovery. And multiply the value of information gathered for BCM activities by repackaging it for strategic purposes.

Show that you are more than just a document generator. Throughout the data gathering process, ask intelligent questions that demonstrate your understanding of and interest in each customer's function, and provide relevant feedback. Also look for ways to streamline existing processes, in the context of improving risk management or enhancing recovery.

Finally, use your BCM exercises to demonstrate value, not merely go through the motions. Cultivate executive involvement in those exercises, where possible. If your political climate is right, you might suggest having executives determine the scenario, and then take themselves "out of play" to observe the process.

Game-plan checklist:

- ☑ Provide a "thin-plan" synopsis that makes it easier for individuals to focus on the key points of their disaster recovery process, without forcing them to sort through the entire thick binder.
- ☑ Don't depend on pass/fail criteria for data recovery. Use your BCM exercises to test people as well as data.
- ☑ Let those exercises focus attention on aspects of organizational activities with the highest strategic value.

Conclusion: BCM is what you make of it.

Don't let past organizational practices or experiences dictate or limit your BCM success. Cultivating good relationships among your "customers" can go a long way to overcoming narrow or outdated perspectives of what BCM is or could be.