clearview
clearview-continuity.com

The following is a transcript of a vendor showcase session delivered at the BCM World Conference and Exhibition 2010 on the 3rd November 2010.

Opening

Hello, I'm Ian Crabb, Business Continuity Specialist at Clearview Continuity and I would like to welcome you to this short presentation about the use of software in supporting business continuity.

Thank you for taking the time out of the conference or exhibition to attend.

During this session I would like to explore some thoughts on the use of software solutions in supporting the business continuity lifecycle, and how these have been translated into the principles that underpinned the development of Clearview. Through these principles, we believe that Clearview delivers a solution that brings simplicity, clarity and ease of use to business continuity management.

I will not be providing a demonstration of the software during this session, so please visit us on stand 2 if you would like to see Clearview in action.

Firstly, I would like to ask you a few questions.

Can we have a show of hands for those of you that use software to support your continuity activity?

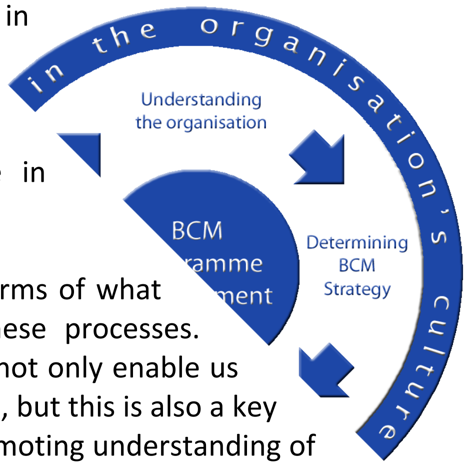
I can see a few familiar faces out there, but can you raise you hand if you are a business continuity consultant?

I will assume, without a show of hands, that the rest of you have real jobs. I should mention that my background is consultancy, so I in saying that I also include myself!

And lastly, who is sceptical about the use of software in business continuity?

Would any of you like to share the reason why you feel this way?

BCM Lifecycle



I would like to start off by looking at the continuity lifecycle, in particular the first two phases of understanding the organisation and determining business continuity strategy.

When we think of these phases, what words do we use in connection with the activity we undertake?

We talk about understanding – establishing our priorities in terms of what we do and what is essential to enable us to carry out these processes. Understanding though, is two-way. The activities we complete not only enable us form a picture that drives our continuity activity moving forward, but this is also a key area to promote engagement with the business, specifically promoting understanding of what continuity is all about to business managers within the organisation.

Through establishing priorities and developing strategies we also seek to gain executive commitment. Whilst we will have this already in order to start our work, it is through these phases that we start to put a cost to our continuity management work and the role of the executive in supporting us becomes ever more important.

With business impact particularly, we sometimes ask whether this is science or art? Our findings need to be interpreted to match organisational objectives and management requirements put into context with that of the whole business.

All our work in these phases delivers our business continuity strategy options that form the building blocks upon which everything else is based.

In looking at these words, does software have a place in driving this activity? Clearly we use tools to help us collect and present information, but hopefully many of you will agree that these lifecycle phases are the ones where expertise, knowledge and experience really matter the most.

This is the domain of the business continuity practitioner.

Next, lets take a look at the other lifecycle phases, those of developing and implementing a response and testing, maintaining and review.

What words do we use in connection with the activity we undertake here?

We talk about framework, structure, templates. We start to develop many of the documents that will become the main points where the business as a whole will start to be touched by continuity.

Documents that describe the way in which we will manage and respond to actual events that threaten our business, widening the participation to all senior managers and around which our general awareness to staff will start. Here we start setting expectations to a wider staff audience about who takes control during incidents, how decisions will be made and importantly what will be expected of those individuals and staff.

Through testing we will bring the subject to life and for many this will be the time where their understanding of what continuity really means to the business will develop.

A driver through all of this is consistency. Consistency of approach, consistency of information and structure and also consistency of process. It is in these stages that we start to look at the regular processes that keep our capability up to date and ensure that our plans are current through regular maintenance.

Of course, we re-visit our business impact and strategies, but how much of this is picked up through planning or through strategic decisions by the business?

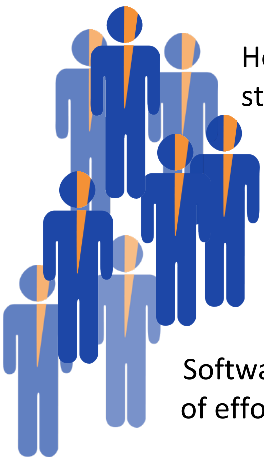
It is in these phases that I believe software has the most value. Not only because of being well placed to support the establishment of regularly occurring processes that take place associated with review and maintenance, but for other reasons as well.

Staying with implementing a response and testing, maintaining and review, these phases of the lifecycle look to broaden the engagement and participation of the business in continuity. We tend to lead a transfer in responsibilities in these phases from the practitioner to business managers.

We talk about the plans developed as being "your plans" and being owned by the business itself. It is often here that we talk about setting objectives around continuity into manager job roles.

But a key aspect here is the balance of effort. I have been speaking to many business continuity managers today, and the general feeling is that for many, between 25% and 40% of their time is taken up chasing plan activity.

Not the best use of an expert's resource.



However, the use of the practitioner's resource is not the only relevant factor. If we start to look at the number of staff that are involved in these phases, whilst they may not spend a large part of their time on continuity, when we have 20 or 50 plan owners and plan maintainers the total effort will dwarf that of the practitioner.

In large businesses this will be even more significant.

Software can have a key role to play in supporting this transfer of ownership and balance of effort.

By making software available to the business, we provide them with the tools to do their job, not do it for them. Software can be a useful focal point around which ownership is transferred.

Software Challenges

When we look at software in the business continuity environment, we also need to recognize challenges that need to be overcome and that should be important considerations in our software selection.

When I looked at business impact and strategy, I talked about interpretation and putting results in context. Not words that I associate with software solutions, but with expertise.

Continuity software is also one of very few solutions that are not used everyday. When we compare usage to core business systems, like financial systems, enterprise resource management solutions; continuity software use is sporadic. If users log in to continuity software on a monthly basis we are doing well. It is not uncommon for users to have many months between access.

This can cause problems with familiarity.

We have a broad range of software competencies in our staff base, but even the most technically un-gifted user will be able to overcome this if they use a system day in, day out to process invoices.

We also have to recognize that regardless of the great job we have done to make staff aware of business continuity, they will never be experts in the field and familiarity may be lost with process as well as tools.

In reality, with the many different job roles our users may have, from finance to supply chain, legal, marketing and administration, we should really consider our user base as members of the public.

How do we use software tools elsewhere?

So we should look at how we use software in our business elsewhere.

Do we use software to set our business strategy, to set our financial strategy, to lay out our procurement strategy, to consider the legal implications of our contracts, to engage management?

No.

Whilst we use tools to present results, we rely on expertise and knowledge to develop opinions, to judge, interpret and guide.

However, software plays a key role in the processes that we undertake in support of these strategies.

Software holds our information; it pays our bills, manages our accounts, manages our stock and sends out our purchase orders.

Software is vital in performing and managing the transactional aspects of our business and it delivers benefits in terms of minimizing the resource required to do this and in ensuring consistency and accuracy.

What should our focus be?

So, taking all this into account, when we look at using business continuity software, where should our focus be?

We need to understand the software model, know where the balance of effort is and recognize that software should address the needs of the majority of users, not just the minority, the continuity practitioner at the centre.

In recognizing this, usability must be at the core of our chosen solution.

Also, software must support our processes; the way we want to work; not make us redefine them, unless of course these changes are an improvement.

This may challenge what we currently look for in software solutions, but we must grasp that software should do what we need, not what we think we need.

Lastly, as with any other software solution, it must fit our culture, not make us fight against it with over rigorous structures, processes and overly complex interfaces.

Myths

Before I move onto to how these thoughts have influenced the development of Clearview, I would just to explore some Myths about business continuity.

I am sure we have all heard these as service providers or said them when we have engaged consultants.

I have often heard people say that their business is unique, their continuity plans very different to the norm and that they do things very differently.

However, this is not always true.

Whilst our businesses are different, the principles that we work to in business continuity are, not surprisingly, very constant. This pre-dated the BCi and the BSI although both have helped us to be consistent in the terms and approaches we all use.

And as for plans, these are little more than text and a collection of lists. Lists of processes, teams, people, assets, tasks to name a few.

We all have preferences in the way that we want to see these lists arranged, but the basic content is always very much the same.

Another myth is that we don't have resource to implement software.

Whilst it is true that software always takes some effort to implement and set-up, if after taking this into account you don't get business benefit or resource benefit from the software you use then you have chosen the wrong tool.

Lastly, whilst software can do many things, it will not replace the professional. In searching for solutions that try and do everything, we should ask ourselves how well does it complete these tasks?

Clearview Principles

At the beginning of this presentation I said that I would look at the principles that we adopted when developing Clearview.

I have only scratched the surface of the thinking that formed these principles. Much more has been learnt from using and deploying tools with clients in the past.

What's important is that we looked at these principles before any code was committed.

Number one on our list was interface. Assuming that our users come from a broad church, fundamental to our solution was that of an intuitive interface. Using techniques that people would be familiar with from publicly accessible web tools was essential.

You should need minimal training; after all, you do not go on a training course to shop at Ocado.

We looked at features and decided early on that features and functionality that were not core to our principles would not be adopted. If features made the software too difficult to use then we had to find another way and design out the complexity.

Whilst user interface was key, we also set out to ensure that Clearview did not require dedicated administrative resource. Tools should empower the business continuity practitioner. If a solution requires that any time saved is spent administering the software then no benefit is gained. Although Clearview can be set up centrally, the tool had to deliver self-service functionality for the end user; in requesting a user id, starting a plan and in completing reviews.

Software solutions must manage and drive the regular maintenance processes. Once deployed software should be forgotten, safe in the knowledge that reminders will be sent and non-compliance escalated in a timely manner.

Further principles adopted included the support of the processes within the continuity lifecycle, reflecting ownership and responsibility; those of plan owners, plan maintainers and plan approvers.

For these roles a key part of Clearview is that of self- assurance. In addition to focusing on managing information contained in plans, Clearview requires owners sign up to a set of policies and principles as part of each review. This ensures that individual managers fully understand their responsibilities and that there is formal governance in place.

Through adoption of these principles and a clear understanding of where software brings most value, Clearview aims to support, not replace the practitioner, releasing them from mundane and administrative transactional activity to fully exploit their expertise, knowledge and experience where it brings most benefit.

In all that we develop, we question whether we are the right people to deliver the solution. We are not developers of notification systems. Rather than compromise the use of such tools, Clearview integrates with other solutions to ensure that you get choice and the best of what is available. This means that features are not compromised when they are not a part of our core business.

Summary

To summarise the key points from this session.

When looking for software to support you in business continuity remember the following: -

- Understand where software actually brings value in your business and the processes that you want it to support.

- Don’t be swayed by feature lists. Be discerning and look at these features in the context of how they actually deliver. Know what you actually want.

- Recognise the value that a practitioner brings. Don’t try and replace everything you do with software. Recognise the value of expertise, experience, knowledge and engagement where it counts.

- Don’t let anything compromise usability. If software cannot be used by those it is designed for, it has no value.

Clearview

I hope that this session has been useful. Please come and visit us in the exhibition area to look at Clearview and see how it delivers simplicity in process and has clarity of purpose that makes it easy to use.

Thank you for coming to this session and I hope you found it useful.

clearview

Clearview from Bis-Web is a family of web based technologies that help businesses manage their Business Continuity Management (BCM) activity and support the processes associated with plan management, maintenance, approval, publication and measurement of BCM policy compliance.

It has been developed around a set of key principles based on the practical experience of business continuity professionals. These are:

- Simplicity and usability
- Empowerment of stakeholders, managers and plan maintainers
- Minimal central administration resource
- Supporting good BCM process and practice

It is securely hosted outside your organisational infrastructure and available whenever you want, wherever you are.

Bis-Web Group

Founded in the UK in 1999, Bis-Web is a fast-growing technology Group. In the UK we have an extensive client portfolio in both private and public sectors plus a global base of international clients, looking to maximise business benefits from smarter and more effective use of online technology.

Our on-line solutions are created by a team with a winning blend of extensive technical and business experience, delivering real and measurable bottom-line benefits for clients. An intrinsic part of the on-line development process is the ability to work with market-leading partners to create tailored solutions, but in a very cost-effective manner.

We provide solutions across all areas of B2B business and organisational/operational applications as online communication and management becomes ever more important for businesses looking to work more cost-effectively.

From smarter online recruitment to business continuity management, from e-commerce platforms to employee cultural surveys and Intranet applications, all our solutions deliver the same promise - a more effective organisation at a very cost-effective price.