# NextGen DR/BC Training

Course Summary

**WTG has been awarded the WOW Award by the Canadian Society for Training and Development** (the Canadian branch of the ASTD) for the Number 1 eLearning course in Canada…any industry…any topic.

**For over 15 years, our President was also one of the owners of RDC, an eLearning company that dominated training** in the Oil & Gas industry for several decades, and as such, has extensive experience and resources in "all things training".

**Below is summary of available WTG courses.** Historically we have delivered training in a face-to-face, instructor-led, classroom model. More recently, clients have preferred one of the following models:

- Interactive, instructor led, web conference
- Pre-recorded, self-directed, web delivery
- Self-paced, eLearning for delivery via SCORM or AICC complaint eLearning systems

**If you are considering training for your staff, we suggest scheduling a detailed curriculum planning meeting** so we can ensure the best fit for your needs, including certification if desired.

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## Introductory Courses

1. **Basic DR/BC Awareness:** Introductory course suitable for all levels explaining the need for DR/BC, the general issues involved, high-level overview of the common solutions and the challenges of implementation. *30 minutes*

2. **The Nature and Causes of Disasters:** Introductory course suitable for all levels, particularly those who will have direct involvement in the program. Topics covered include: what constitutes a disaster, when does an incident become a disaster, how to identify a disaster, examples of atypical disasters and a review of real-world examples of each type of disaster. *30 minutes*

3. **Basic DR/BC Concepts and Considerations:** An intermediate course suitable for all program participants. Expanded focus on the aspects of the DR/BC program including intermediate introduction to: risk analysis, needs analysis, the BIA process, types and standards for DR/BC plans, the role of testing, the need for maintenance, roles and responsibilities and RD/BCs place in the enterprise. *1 hour*

4. **The Recovery Timeline:** The Recovery Time line is the process all organizations must go through to recover from a disaster and as such, is the process that all Recovery Plans must be written to. Everyone involved with your DR/BC program must understand the timeline and its implications on your planning efforts and your future recoverability. This course includes: an overview of the standardized Recovery Timeline, discussion of the five stages of all recovery efforts, how much data will you lose?, the challenge of data synchronization, roles and responsibilities: IT versus Business Staff, how long will your recovery really take? *1.5 hours*

5. **Incident Management – The Umbrella:** COOP, COG, Disaster Recovery, Business Continuity, Emergency Management—regardless of the discipline, the critical factor is for your plan to integrate seamlessly with the rest of the organization at time of disaster. This course provides a model for multi-plan coordination and communication as well as a unique way to ensure effective incident management from the top down. Topics include: where does DR/BC fit?, how to integrate your plan with those of other agencies, who does what from where?, how to ensure intra-departmental communication at time of disaster, how the Incident Management Team differs from all other teams and why their plan must be so different. *1 hour*

## Roles and Responsibilities

6. **DR/BC Response Team Roles and Responsibilities:** There are many different types of teams each with specific and unique roles both before and during disaster event. This is an intermediate course designed specifically for program managers and/or “Response” team leaders, alternates and members—those who actually manage the disaster response (DR Response Team, BC Response team and Business Unit response Team). This course will present detail on member qualification; member selection; pre, during and post-disaster roles and responsibilities and logistical issues of multi-team membership. *1.5 hours*

7. **DR/BC Recovery Team Roles and Responsibilities:** There are many different types of teams each with specific and unique roles both before and during a disaster event. This is an intermediate course designed specifically for program managers and/or “Recovery” team leaders, alternates, and members who actually perform the recovery efforts (Work Area Recovery, Server Recovery, communications Recovery, Applications Recovery, etc.). This course presents detail on; member qualification, member selection, pre, during and post-disaster roles and responsibilities, and logistical issues of multi-team membership. *1.5 hours*

8. **Support Team Roles and Responsibilities:** There are many different types of teams each with unique roles both before and during a disaster event. This is an intermediate course designed specifically for program managers and/or “Support” team leaders, alternates, and members who

provide corporate services to support the recovery effort (HR, Risk Management, Security, Facilities, etc.). This course presents detail on; member qualification, member selection, pre, during and post-disaster roles and responsibilities, and logistical issues of multi-team membership. *1.5 hours*

9. **Business Unit Team Roles and Responsibilities:** There are many different types of teams each with unique roles both before and during a disaster event. This is an intermediate course designed specifically for program managers and/or "Business Unit" team leaders, alternates, and members who provide operational business services during the recovery effort (Accounting, Sales, Legal, HR, customer Service, etc.). This course presents detail on; member qualification, member selection, pre, during and post-disaster roles and responsibilities, and logistical issues of multi-team membership. *1.5 hours*

10. **Incident Management Team Roles and Responsibilities:** There are many different types of teams each with unique roles both before and during a disaster event. This is an intermediate course designed specifically for program managers and/or "Incident Management" team leaders, alternates, and members who provide management oversight to support the recovery effort. This course presents detail on; member qualification, member selection, pre, during, and post-disaster roles and responsibilities, and logistical issues of multi-team membership. *1.5 hours*

11. **Senior Management Roles and Responsibilities:** Senior Management has unique responsibilities to support the program, the measure its success, and to protect corporation's assets. This is an intermediate course designed specifically for program managers and/or Senior Management and presents detail on pre, during, and post-disaster roles and responsibilities, and the special challenges for management during disaster events. *1 hour*

## Needs Analysis

12. **Critical Application Workshop:** To ensure that a recovery capability addresses all of the business' critical functions in the most cost- and operationally-effective manner requires that the critical applications and interdependencies are identified accurately. This course teaches a proven, proprietary approach for critical application analysis that defines mission-critical applications, second and third level interactions, upstream and downstream dependencies, recovery requisites, data integrity requirements, recovery sequences RTOs and RPOs and solution architectures. This is an advanced hands-on course for facilitators, instructors and program leaders and includes a step-by-step facilitators guide. *3 hours*

13. **Business Impact Analysis:**
    a) **Introductory BIA:** This is an introductory course suitable for anyone who has an interest in understanding the purpose and process of a Business Impact Analysis. This course presents an overview of: the purpose for a BIA, pros and cons of the traditional BIA approach, the BIA process and the BIA report. *30 minutes*

    b) **Intermediate BIA:** This course is designed for the business unit representative(s) who needs to participate in the BIA interview/ survey process and will prepare them to accurately represent their department's critical processes and recovery needs. Concepts covered include: inherent criticality, resultant criticality, impact, Bridgeability, RTO, RPO and recovery requisites. *1.5 hours*

    c) **Advanced BIA:** This is an advanced hands-on course for facilitators, instructors and program leaders who need to conduct a BIA. Focus will be on: identifying mission critical processes, upstream and downstream dependencies, recovery requisites, Inherent Criticalities™, Resultant Criticalities™, Need/Need+/Need- solutions, Riser Warnings™, Break Points™, Acceptable Risk Points™ and other key data. The course will also focus on how to use WTG's IBPD tool and includes a one-time license. *2 days*

## Solution Design

14. **Recovery Architecture Design:** Designing a Recovery Architecture is easy. Designing the optimal footprint that meets your needs is not. Unless you design the optimal footprint, you will be paying too much! This is an advanced course designed for non-technical program management and team leaders and alternates and reviews the pros and cons of over a dozen of the most popular recovery architecture models. *2 hours*

15. **Data Availability Design:** Data is the key to recoverability, but data availability is no longer a simple matter of backing up disks to off-site tape storage. This is an advanced course, suitable for program management as well as all team leaders and alternates, which prepares participants to present their data availability needs to IT and to communicate with IT at a knowledgeable level. All five aspects of data availability are examined in depth: Data Selection ensures that all critical datasets and databases are identified at the application level and that all redundancies and batch propagation are eliminated; Data Accessibility—the length of time it takes to make data re-available—is examined and corrective strategies are discussed; Data Synchronization (especially cross-application and cross-platform synchronization) to a logical point in time is reviewed; Data Integrity strategies that minimize exposure to lost or corrupted data are reviewed; and finally, Data Protection is discussed through strategies for archiving, off-site storage, rotation and data backup. The latest technologies like data replication, deduplication, hypervisors, cloud storage, storage virtualization, etc. are also reviewed. *2 hours*

16. **Systems Availability Design:** The best possible recovery solution is to not fail in the first place. This course is designed for the non-technical practitioner who needs to understand technical system recovery options well-enough to interface with IT and to introduce the latest recovery options to the program. The latest approaches and technologies to increase production availability, while concurrently reducing recovery time-frames and alternate site footprints are examined. Relevant technologies (including data replication, deduplication, hypervisors, cloud storage, storage virtualization, etc.) and their pros and cons are reviewed. *3 hours*

17. ***Application Availability Design:*** Most organizations have a small handful of ultra-critical applications. Or sometimes, they have a small handful of problem applications—those that are too big, or too old, or too distributed, or just “too something” to recover according to the business' needs. These applications often seem to take over the entire planning effort. Disproportionate time, energy and budget are spent trying to recover these apps and too often, the rest of the environment suffers. This is an advanced course that prepares non-technical program management, team leaders and alternates to intelligently present their needs to IT by offering an approach to identify problem applications and describing a range of solutions to make those applications more recoverable. *2 hours*

18. **Staff Availability Design:** Making sure that your people are ready, willing and able to work during a disaster event takes planning, and the perceived panacea of remote connectivity and working from home is only a small piece of the puzzle. This is an advanced course suitable for program managers, team leaders and alternates, and business unit leaders that will address: policies and procedures defining the level of support the company is able to offer employees at time of disaster and the support you'll expect from them in return; short-term and long-term staffing alternatives, job-sharing possibilities, shift shifting, and work rerouting opportunities; criteria for an alternate work area solution that considers existing resiliency, application restrictions, connectivity requirements, workflow dependencies, proximity requirements, and time-of-day interfaces. *2 hours*

## Plan Development

19. **How to Write Recovery Procedures:** Recovery procedures are a key element of the entire recovery capability. As such, it is imperative that they be clear, concise and very explicit. They must also dovetail seamlessly with the core plans. This course addresses the practical requirements for writing functional recovery procedures and is targeted for subject matter experts who are not documentation specialists. Covered are: proper level of detail, details without technology, what to include and what to exclude, understanding the audience, pre-testing the procedures and more. *2 hours*

20. **What Makes A Great Plan:** It's hard to imagine why after nearly thirty years, the disaster recovery industry has not published a Best Practice recovery plan. That is until you understand the effort it takes to create one. During this session, we will use an actual plan document to review the elements of a best practice plan first hand. The course is suitable for all program participants particularly program managers, team leaders and alternates and plan administrators and addresses: the critical flaw in most recovery plans, plan format, structure and organization, the difference between action tasks and procedures, what belongs in your plan and what doesn't, a one question test to evaluate your plan's effectiveness, a complete Table of Contents for a Best Practice plan. *2 hours*

21. **How to Ensure Cross-Plan Coordination:** Few organizations today enjoy the option of needing only one plan. Whether the need for multiple plans is driven by departmental plans, different business unit plans, special needs plans (i.e. crisis communication), location-specific plans or any other driver, one thing is certain…all plans must interface together seamlessly. This means that each plan must address cross-plan interfaces, cross-plan communications and cross-plan milestone management. This course offers specific tips and techniques for ensuring that all of your plans "talk to each other". *2 hours*

## Testing

22. **DR/BC Testing:** Our industry's mantra is "Test…Test…Test"! And when you're done, test some more. There is a closely parallel theme that says "There is no such thing as a failed test". WTG disagrees. In fact, we find it startling how many tests are fundamental failures. This is an intermediate course that is geared to the seasoned practitioner who wants/needs to improve the effectiveness of their testing. The course addresses the types of tests, the Testing Lifecycle, the reverse testing timeline, the difference in preparing for simulated versus physical tests, the elusive surprise test, post-test evaluation and many other aspects of effective testing. *2 hours*

23. **How to Prepare for a Test:** Testing is universally considered one of the most important aspects of a DR/BC program. It can make the difference between a successful recovery and a failed recovery. But good testing requires good test preparation and skills that are not inherently available in most organizations. This course is designed for beginning and experienced testers alike and provides a complete overview on the process and techniques of testing, including: types of tests, test scheduling, setting objectives, planning documents, preparing test data, executing the test, post-test follow-up and much more. *4 hours*

24. **How to Develop a TableTop Exercise:** Table-top exercises are an invaluable way to familiarize your team members with the disaster recovery timeline and to delineate their responsibilities at time of disaster from those of the operational business units. A table-top exercise is also the best way to explore the nuances of different events and to prepare your teams to understand how varying impact scenarios change their recovery duties and capabilities. In a matter of hours, your team's practical experience can be increased dramatically and the breadth of their experience can be extended over a large number of possible disaster variants. This is an advanced course that prepares senior practitioners with a proven process for creating realistic TableTop exercises with minimal effort. *1 day*

## Assessment and Benchmarking

25. **Risk Assessment:** This is an advanced course that provides a risk assessment model and prepares a facilitator to conduct the assessment. The course will address over 100 distinct physical exposures. For each exposure, the following aspects are covered: Risk (the probability that an event will occur), Impact (the magnitude of damage that would occur), Target Significance (the importance of the target which is subject to the exposure), Mitigation (the effectiveness and extent of active preventive measures), Amelioration (the effectiveness and extent of passive preventive measures) and Appetite (the willingness of the enterprise to accept the risk). The process to aggregate these six factors is also presented. A one-time license to the Risk Assessor is included. *4 hours*

26. **Plan Assessment:** This is an advanced course that presents a compressive methodology for impartial, evaluation of an existing recovery/continuity plan and prepares an experienced practitioner to assess a plan and verify whether it supports the organization's requirements for continuance. This course will offer a reporting model that will ensure that plan owners understand what makes a good plan, the pitfalls of a bad one and how theirs stacks-up. The follow categories will be covered: Assessment of plan completeness, Assessment of plan "currentness", Assessment of plan usability, Assessment of plan maintainability, Assessment of plan effectiveness. *1 day*

27. **DR/BC Program Assessment and Benchmarking:** This is an advanced course that presents a compressive methodology for impartial, evaluation of an existing recovery/continuity capability and prepares an experienced practitioner to assess a program and verify whether it supports the organization's requirements for continuance. This methodology addresses all of the elements of a program to ensure that they adequately support the stated recovery objectives. Over 1,000 individual aspects of recoverability are addressed ranging from disaster assessment procedures to alternate site applicability to post-disaster normalization. Includes a one-time use of WTG's CPR™ tool, which generates over a dozen unique reports. *3 days.*

28. **IT Policies and Procedure Assessment:** This is an advanced course that presents a compressive, impartial methodology to evaluate IT Policies and Procedures and prepares a seasoned, but non-technical practitioner to assess whether they support or hinder business continuity needs. The course addresses over 500 components of the daily IT Process and Procedure to determine the extent to which they insulate the organization from operational risk, or conversely, the extent to which they expose the organization to risk. Since nearly 80% of commercially supported disasters occur from "preventable" failures, prevention is a critical part of any disaster recovery capability and IT process and procedure is the foundation upon which that prevention is built. The methodology addresses the following major categories: management controls, change management, problem management, information security, data backup and restore, data archiving, availability management, network management, performance management, configuration management, software distribution and data center documentation. Includes a one-time use of WTG's proprietary evaluation tool. *1 day*

29. **Facility Infrastructure Assessment:** This is an advanced course that presents a compressive, impartial methodology to evaluate building infrastructure and prepares a seasoned, but non-facilities focused practitioner to assess whether that infrastructure supports or hinders business continuity needs. Infrastructure resilience is a significant factor in a facility's potential exposure, or resistance, to process interruption. This course addresses nearly 500 distinct actionable areas of facility infrastructure and hardening (and 500 more for a data center environment) that can have direct positive impact on the facility's resistance to process interruption. The following major categories are reviewed: site selection, building exterior, building architecture, parking area, inter-floor access controls, data center design, utilities: telecommunications, water, gas, electrical, electrical-mechanical systems, thermal control, detection and protection, physical security. Includes a one-time use of WTG's proprietary evaluation tool. *2 days*

## Ongoing Maintenance

30. **Change Control:** Change Control procedures ensure that major changes to the production environment are captured as they occur instead of in arrears according to some arbitrary schedule. Given today's large, complicated, multi-platform business environments and the constantly accelerating rate of change, traditional periodic plan maintenance is inadequate. By the time the quarterly or semi-annual maintenance update cycle comes about, the plan is often outdated. Our experience indicates that the significant components of a recovery plan change 40% to 70% every year. At this rate, there is enough change between quarterly updates to invalidate a recovery capability and make a company non-recoverable. This is an intermediate course suitable for all program managers and team leaders and alternates and covers real-world techniques to control and reduce maintenance through change control. 2 hours

31. **Plan Maintenance:** Ongoing periodic plan maintenance and periodic audits ensure that those areas of the recovery capability not subject to change control updates are captured and recorded so that the recovery capability and the environment that it protects stay completely synchronized. This is an intermediate course for program manager, team leaders and alternates as well as plan administrators. This is an intermediate course that will offer a complete approach to effective plan maintenance and will focus on ways to eliminate or reduce maintenance in a practical fashion. *1 hour*

## Other

32. **DR/BC Make or Break Practices:** There are innumerable DR/BC standards that can all be viewed as representing "Best Practices". But none of them even attempt to cull out those that will Make or Break your program. This is an intermediate course designed for anyone who is really interested in ensuring that the program works…really works! The Top 20 Make or Break practices are examined and explained with real-world examples. *1 hour*

33. **DR/BC "Mythconceptions":** This course is suitable for anyone who is interested in improving their program, especially long-term practitioners. Many of the fundamental practices in DR/BC were invented almost 30 years ago for a mainframe-centric world that no longer exists. This course takes-on some of the disaster recovery industry's most "sacred cows" and explain why they may be adding years of useless work to your program and maybe even threatening your recoverability. Some of the "Mythconceptions" addressed include: the fundamental flaws of a Business Impact Assessment; "There is no such thing as a unsuccessful test", why your Recovery Point Objective (RPO) isn't what you think it is, the fallacy of the fail-first-then-recover model, etc. *1 hour*

34. **DR/BC Standards Contrasted and Compared:** An intermediate course designed for the program management and/or compliance specialist. There are many formal and informal, national and international, generic and industry-specific standards across the DR/BC, Emergency Management, Security, Risk Management and Crisis Management space that choosing the right one to base your program on is becoming nearly impossible. This intermediate course defines the dominate standards and defines and describes the differences between them. *1 hour*

35. **Laws, Acts and Guidelines:** There are literally dozens of formal laws and acts and at least as many voluntary guidelines that require/suggest compliance such that it is very difficult for an organization to know which ones they are subject to and which one(s) are dominant when subject to many. This intermediate course presents program manager and compliance managers with an overview of the primary compliance sources and helps sort out their applicability. *1 hour*