Beware of Artificial Readiness

By JEFF GARRISON

Everyone loves good news and hates the bad. Hearing "yes" is great, hearing "no" is not so great. Desiring to hear "you will be getting all you asked" is human nature. It makes life better, less stressful, and often times makes your job simpler.

Just like there is no crying in baseball, good intentions by themselves do not belong in disaster readiness. It is the responsibility – and the burden – of the business continuity and disaster recovery (BC/DR) planner to determine whether the in-place recovery plan will realistically support the recovery time objective requested or required by the business. Obstacles may exist – some innocent, others not so much – in the path to true BC/DR readiness.

Some of these obstacles may not be related to cost, schedule, or force of nature but may instead be comprised of an organic, thinking, breathing form.

Let us meet a few.

The 'Need A Win' Organizer

A BC/DR activity is scheduled to demonstrate an organization's true readiness. Sadly, what the event organizer actually wants to take place may not be a true readiness demonstration. Corners may be cut, cheats put in place, and comforts provided to make the activity as successful to the end user as possible. However, rather than identifying these exceptions as part of the exercise setup, at times necessary to perform the exercise, the event organizer may choose to communicate nothing. This may mislead participants into believing everything, as observed, would be available in an actual declared event.

Often times, especially in a live business operations exercise, certain liberties may be necessary to accomplish the dual purpose of successful exercise and uninterrupted business operations.

For total transparency, three questions need to be asked:

1. Is this customization documented in the test or activity procedures?
2. Is this customization a formalized part of the continuity or recovery strategy?
3. If it is not, what will it take to incorporate it into the continuity or recovery strategy?

Unique recovery services and equipment may include business-critical shortcuts; function-specific equipment such as custom check printers for groups such as the finance department; client installations on dedicated or license-specific workstations; and security tokens such as USB key fobs, phone, and fax services.

These exceptions, when handled in an appropriate manner, can be valuable in helping determine with the user what additional changes may be needed and should be captured as action items to acquire and implement in the future for effective readiness.

No business is too small
No recovery is too minor
No risk is too obscure

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The Amiable Leader

Amiable leader (AL) may be perhaps the most disappointing super hero of all. The well-intentioned AL wants to be known as the Win/Win Benefactor of Good Will, often times at all costs as long as AL believes it makes everyone happy and it actually does not cost anything.

AL's dedication is toward maintaining the image of status quo. AL does not want to be the person who communicates potential risks, issues, or bad news in general. AL believes in happy thoughts and happy messages. Don't rock the boat and hope you are not asked a direct question.

Contrary to the beliefs of some, there is no known or collected evidence that an AL from a number of years back was heard saying, "Do not concern yourself with that iceberg up ahead. We will simply cut it up and use it for ice cubes to serve lemon-flavored snow cones to the passengers." That attitude has been the cause of many good efforts and intentions going awry.

Best-laid plans seldom result in a happy ending without a clear, dedicated direction and a commitment to provide the necessary people, time, and resources required to ensure a successful solution delivery.

The Box Checker

To achieve a system's true BC/DR readiness, the simplest spot to achieve readiness is during the system's initial project development and roll out.

At times, especially in organizations where process is not strong or is allowed to be ignored, the project team may choose to ignore basic and critical BC/DR readiness, treat it as an inconvenience, and choose to not implement the necessary features (replication, dedicated hardware, licenses, and support) during the initial phase. At the same time, however, the project team communicates to the customer the desired readiness is still on course, in spite of the fact it is technically unrealistic that it can be achieved due to critical features not being in place.

For budget-tight or schedule-concerned organizations, the project delivery team may try to get out of including delivery of a BC/DR solution to their project delivery. They may not want the cost added to their budget so they look more efficient than other groups. Or they may not want to be burdened with the perceived extra time it would take to add BC/DR accountability to their schedule. In short, "I'll gladly have someone else deliver on Friday what I was supposed to deliver today."

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A Blustery Wind

Hanging out near the Box Checker and Need a Win folk, quite possibly enjoying a latte in their company, you'll find The Big Talker. Like the proverbial "Big Hat No Cattle," Big Talker will be first to speak, quick to blame, and last to volunteer. Big Talker is well-spoken, confident, and cuts an impressive presence. But afterward, like after eating potato chips, you may find yourself feeling as if something was missing in the discussion, something of substance. You might be feeling a little bloated, too.

The Big Talker may appear in many guises. This person may present himself or herself in the appearance of an application development or support team leader. The leader will be full of enthusiasm, willingly volunteering the support of the leader's team and looking forward to taking the recoverability out for a test drive to demonstrate just what it can do. But when the rubber hits the road on the test drive, the team is a no-show. Support team personnel do not arrive for their designated assignments. They do not answer calls and page outs sent to them and act very inconvenienced when their "personal time" is interrupted once you do make contact with them.

The previously "all-in" application team leader then will spin a yarn of self-rationalization on why the team was nowhere in sight, leaving disappointed and very annoyed volunteer testers and business users without support and why the leader did not hold the team responsible. Yet, after it is all said and done, or not done in this case, the support leader still expects a gold star of success for their "participation." The use of quotations gets a lot of use when The Big Talker blows into town.

The Terribly Mysterious Third Party

Companies currently under recovery services agreement – or those who have recently broken away and are trying to build their own enterprise recovery and readiness program – are especially at risk of persuasion from those same recovery providers.

Like the old snake oil seller, the consulting specialist from that third-party solution provider will tell you wonderful things in such wonderful ways – things you want to hear. However, beware of the wonderful yarns being spun to you. What is the risk of the suggestion? Is there capacity? Are the allocated resources sufficient? And lastly, what level of participation, accountability, and responsibility will that organization and consulting specialist take, especially if their suggestion turns bad.

If you are not careful you may be aboard a runaway train with no brakes, just ahead of an avalanche, and you're about to crash into a flaming dumpster fire.

That consulting specialist, that charming salesman, has already handed you the steering, jumped off the train, landed on a soft haystack, climbed aboard the snake oil wagon, and is headed off to the next stop and left for you a mess to clean up, questions to answer, responsibility to accept, and blame to take.

Vacuum Delivery Expert

Delivery in a vacuum may be a sincere attempt at a solution. Trying to not inconvenience others, it innocently progresses in a too-narrowly-focused focus group, or vacuum. When the vacuumed solution is "slid in" included into a larger readiness effort, the solution and its workings may not work or may entirely miss the mark of what it was supposed to deliver.

Operating in a vacuum implies the assumption that a limited group of people participating in the discussion know all the information, understand all the risks and impacts, and can speak on behalf of all parties that will be impacted plus know exactly who the "all parties" will be comprised.

When operating in a vacuum you run the risk that poorly thought out and dangerous assumptions and decisions could be made without the right people in attendance for the big discussions. Impacts, dependencies, risks, along with training and educational material needs, are invaluable benefits of having the essential groups and resources participating.

Can you really answer these questions in a vacuum?

- What is needed?
- What is planned to be delivered?
- How will it benefit as well as impact your team and customers?
- Identify, if any, potential gaps between the customer's needs and what is being delivered.
- Determine, during the initial analysis and planning, what it will take to fill the gaps including but not limited to cost, material, time, and resources during the initial delivery.
- Present to the customer (sponsor, stakeholders) and let them decide if they want to invest the time, money, and resources toward filling the gaps during the initial delivery.
- If yes, adjust the delivery plan accordingly.
- If no, develop strategies to mitigate the gaps during the interim time until the customer decides to address them in the future.

Parting Wisdom

Take nothing for granted, ask a lot of questions, be nosey, annoying, demanding, and do not allow half answers complete with lots of mumbling and paper shuffling while the speaker stares at his or her shoes. At the end of the day your program readiness belongs to you, the user, and to the customer for whom it ultimately has an impact.

Swing for the fences, cover your bases, don't strike out, avoid the error, and still be satisfied if it turns into a ground rule double. In translation, know what you want, ask for it, be transparent in your delivery, and have contingencies to cover the gaps between what you asked for and what you got.

You have a right to know how it works, does it work, and does it truly meet your needs when the gloves come off and you have to use and depend on it … for real. Be comfortable in your own skin and in your own message.

Don't worry what AL does or doesn't say.

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