Wind, Rain & Fire: Disaster Preparation & Recovery

The Disaster Recovery Plan

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Agenda

- Introductions
- Disaster Recovery Issues
- Disaster Recovery Scenarios
- Disaster Recovery Plans
- Practical DR Tips
- Questions

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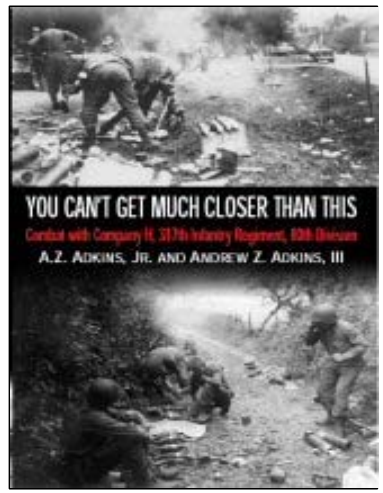
- University of Florida Levin College of Law (1997)
  - Director, Legal Technology Institute
  - Associate Director, Technology Services
  - Adjunct Professor, *Law Practice Management*
- Legal Technology Consultant (1989)
  - 325+ Personal Consultations
- ABA TECHSHOW Chair (2000, 2001)
- LegalTech Conferences Co-Chair (2000-2004)
- Author:
  - *"Computerized Case Management Systems"*
  - *"You Can't Get Much Closer Than This"*
  - 125+ Legal Technology Articles
  - 130+ Legal Technology Presentations



Disaster Recovery/Business Continuity

Facts

- Business Continuity is a priority “issue”
- Planning and Preparations are significantly underdeveloped, underachieved

“Accidents and disasters do not make appointments.”

Disaster Recovery Plan Issues

- What's important to you?
- What's important to your staff?
- What's important to your clients?
- What's needed to keep the firm functioning?
- Who's involved in the DR planning?

"Disaster Recovery is MORE than technology recovery; it's also Business Continuity"

Disaster Recovery Plan Issues

- Who will initiate the plan?
  - Who will issue the order to “turn off” all servers?
    - May need to shut down servers to protect them
- Communicate this to everyone BEFORE you have to initiate the DR plan
  - Communicate how long servers expected to be down (if possible and in what scenario)
  - Eliminate the need to decide why, when, & how

Scenario Planning

- Possible scenarios:
  - Natural Disaster
    - Hurricane, Fire, Tornado, Flood, …
  - Man-made Disaster
    - Terrorist attack, Disgruntled employee, Lost Laptop, PDA (Stored Passwords)
  - Other Disaster
    - Entire IT staff “hit by a bus”

Disaster Recovery Plan Scenarios

- Data Stolen, Compromised
- Regional Office Destroyed
  - Regional servers destroyed or compromised
- Main Office Destroyed
  - Main firm servers destroyed or compromised

Disaster Recovery Plans – 1

- Contact Information
  - Who are the key people?
  - Who's in charge?
  - Where are they?
- Location Information
  - Where is the backup?
  - Where are the disks & license keys?
  - Where is the relocation site?
- Recovery Information
  - What is restored first?

Disaster Recovery Plans – 2

- List all technology assets
- List data backup information
- Identify Mission Critical Applications
- Identify Critical Data

Disaster Recovery Plans – 3

- What are your priorities?
  - Yes, this is a question for attendees

  1. Communications (phone, email)
  2. Data (firm, client)
  3. Web site

Disaster Recovery Tips – 1

- Plan on not having a full IT staff
  - They may also be personally affected
  - Look into outsourcing recovery “pieces”
- Your DR Plan should have a checklist to follow
  - The plan will be the voice of reason in a crisis
  - Test the plan at least once every year; this will help pinpoint problem areas
- Document everything you can during the recovery (contacts, meetings, dates, notes)
  - You’ll need this for insurance

Disaster Recovery Tips – 2

- Provide “main” players with the DR Plan
- Identify a “hot site”
  - Not necessarily a technology hub, but a “meeting place”
  - Copies of applications; license codes
- Leaders will look to the most prepared for support
- Communications (phone, email, etc.) WILL be overloaded
  - Phone book, includes work, home, cell, email(s)
  - Phone Tree

Disaster Recovery Tips – 3

- Keep an inventory of old computers, boxed up with CRTs, keyboards, mice, SW, image, Citrix (if used)
  - Store in a geographically safe location
- Keep old servers necessary for initial recovery
  - Store in a geographically safe location

Recovery Realities

- Day 1
  - Sympathy, compassion, concern
- Day 2
  - Assess status of technology & business
    - What works, what doesn't
    - Determine what part of DR Plan to put into action
      - This is why you discuss scenarios
    - Who's around & can work?
- Day 3+
  - Put the DR Plan into action
  - Rebuild communications first internal, then external

Recovery Expectations

- Lack of communications
- Limited bandwidth
- Limited resources
  - External as well as internal
- Displaced personnel

Lessons Learned (NO, NY firms)

- Blackberry chargers (left at office)
- High staff morale
- Gasoline shortage
- Delivery delays
- High level of vendor support
- Housing shortage (including hotels)
- Traffic problems
- After action meeting(s)

Questions

- What time is it?
- Do I know a good, *independent* legal technology consultant?

Thank You!

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