ChecklistGuro

ERP Business Continuity Planning Checklist

Risk Assessment & Impact Analysis

Identify potential disruptions and their impact on critical business processes.

Describe potential ERP system failures (e.g., hardware, software, network)

Write something...

Identify critical business processes dependent on ERP

Write something...

Estimated financial impact (revenue loss) per day of ERP downtime

Enter a number...

Estimated time to restore ERP functionality (RTO)

Enter a number... hours

Which departments are most affected by ERP downtime?

- [ ] Sales
- [ ] Finance
- [ ] Operations
- [ ] HR
- [ ] Marketing

Date of last risk assessment review

Enter date...

Data Backup & Recovery

Verify data backup procedures, storage locations, and recovery time objectives (RTOs).

Backup Frequency (e.g., daily, weekly)

Enter a number...

Last Successful Full Backup Date

Enter date...

Next Scheduled Full Backup Date

Enter date...

Retention Period (in days)

Enter a number...

Backup Storage Location(s)

Write something...

Backup Type (Full, Incremental, Differential)

- [ ] Full
- [ ] Incremental
- [ ] Differential

Example Backup Log File (optional)

Upload File

Recovery Time Objective (RTO) (in hours)

Enter a number...

System Redundancy & Failover

Assess the effectiveness of redundant systems and failover capabilities.

Number of Redundant Servers

Enter a number...

Failover Mechanism Type

- [ ] Automatic
- [ ] Manual
- [ ] Hybrid

Maximum Failover Time (minutes)

Enter a number...

Last Failover Test Date

Enter date...

Description of Failover Procedure

Write something...

Geographic Redundancy Status

- [ ] Yes
- [ ] No

Network Diagram (showing redundant systems)

Upload File

Communication Plan

Define communication protocols and responsibilities during a disruption.

Primary Contact Name (ERP Incident)

Write something...

Primary Contact Phone Number

Enter a number...

Secondary Contact Name

Write something...

Secondary Contact Phone Number

Enter a number...

Pre-Approved Communication Templates (examples)

Write something...

Communication Channels (choose all that apply)

- [ ] Email
- [ ] Phone Calls
- [ ] SMS/Text Messages
- [ ] Instant Messaging (e.g., Slack, Teams)
- [ ] Company Intranet

Last Communication Plan Review Date

Enter date...

Escalation Procedure Details (who to contact when)

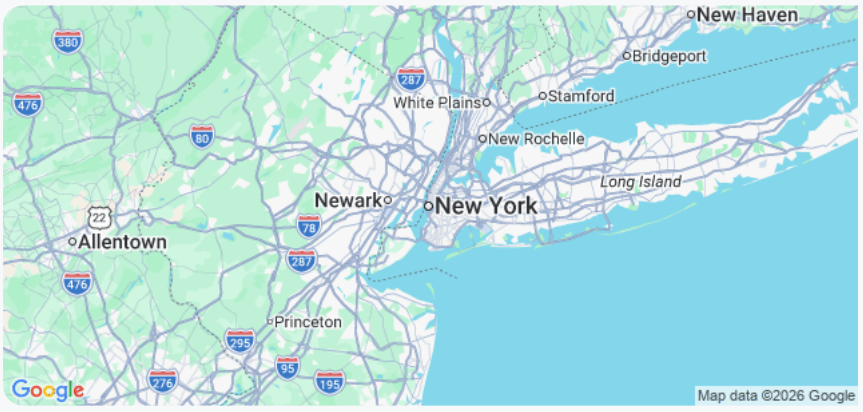
Write something...

Alternative Work Locations & Resources

Plan for alternative work locations, equipment, and personnel.

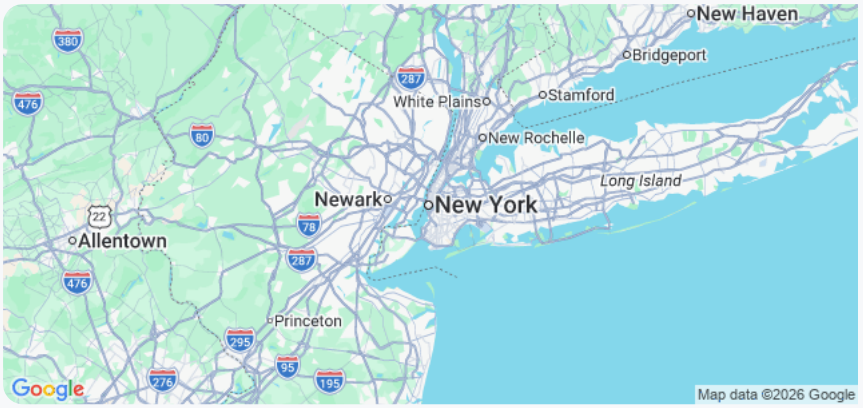
Primary Alternate Work Location

Set My Current Location



Secondary Alternate Work Location

Set My Current Location



Number of Laptops Available

Enter a number...

Number of Mobile Hotspots Available

Enter a number...

Communication Method for Remote Team

- [ ] Phone
- [ ] Email
- [ ] Instant Messaging
- [ ] Video Conferencing

Last Check of Alternate Work Location Readiness

Enter date...

Necessary Software Available Remotely

- [ ] ERP Client
- [ ] Office Suite
- [ ] VPN Client
- [ ] Remote Access Tool

Third-Party Dependencies

Evaluate dependencies on external vendors and service providers.

Critical Vendor Identification

- [ ] Yes - Critical to ERP Functionality
- [ ] No - Supports Non-Critical Processes

Vendor Service Level Agreements (SLAs)

Write something...

Vendor Contact Point - Primary

Enter a number...

Vendor Contact Point - Secondary

Enter a number...

Last Vendor Contact Verification Date

Enter date...

Critical Services Provided by Vendors

- [ ] Data Storage
- [ ] Network Connectivity
- [ ] Application Hosting
- [ ] Security Services
- [ ] Payment Processing

Potential Risks Associated with Vendor Dependencies

Write something...

Testing & Training

Schedule regular drills and training sessions for all stakeholders.

Number of Participants in Training Session

Enter a number...

Date of Last Business Continuity Drill

Enter date...

Estimated Time to Recover from Simulated Failure (Hours)

Enter time...

Simulated Failure Scenarios Tested (Select all that apply)

- [ ] Hardware Failure
- [ ] Network Outage
- [ ] Data Breach
- [ ] Power Outage
- [ ] User Error

Summary of Training Feedback and Key Learnings

Write something...

Overall Effectiveness of Training (Rating 1-5, 5 being most effective)

- [ ] 1
- [ ] 2
- [ ] 3
- [ ] 4
- [ ] 5

Upload Training Documentation/Recordings (Optional)

Upload File

Plan Maintenance & Updates

Ensure the business continuity plan is reviewed and updated periodically.

Last Plan Review Date

Enter date...

Next Scheduled Review Date

Enter date...

Review Frequency (Months)

Enter a number...

Summary of Changes Made

Write something...

Review Type

- [ ] Full Review
- [ ] Partial Review

Supporting Documentation (e.g., review minutes)

Upload File

Responsible Party for Review

Write something...

Incident Response Procedures

Outline steps for responding to and resolving ERP-related incidents.

Initial Incident Description

Write something...

Incident Severity Level

- [ ] Low
- [ ] Medium
- [ ] High
- [ ] Critical

Estimated Impacted Users

Enter a number...

Incident Start Time

Enter date...

Time Incident Notified

Enter time...

Primary Contact Person

Troubleshooting Steps Taken

Write something...

Relevant Log Files/Screenshots

Upload File

Resolution Details

Write something...

Incident Resolution Date

Enter date...

Post-Incident Review & Improvement

Conduct post-incident reviews to identify areas for improvement in the business continuity plan.

Summary of Incident and Impact

Write something...

Downtime Duration (in hours)

Enter a number...

Date of Incident

Enter date...

Root Cause Analysis Findings

Write something...

Contributing Factors (select all that apply)

- [ ] System Failure
- [ ] Human Error
- [ ] External Dependency
- [ ] Process Deficiency
- [ ] Security Breach

Recommended Corrective Actions

Write something...

Planned Implementation Date of Corrective Actions

Enter date...

Reviewer Signature