Business Continuity Project- Key Success Factors

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Introduction

This short paper describes the key elements to consider in managing a business continuity plan (BCP) project. The particular project involved the Australian operations of an international funds management organisation. The organisations had not previously considered the need for a BCP and the uncertainty surrounding the millennium change over provided the motivation to develop one. The success of the project however rested on the 6 key success factors described below.

Background to the MBCP Project

In preparation for the uncertainty of the Millennium cutover, the Millennium Business Continuity Planning (MBCP) project was initiated to coordinate the preparation of business continuity plans for all business units and subsidiaries. The project spanned almost 12 months and had three major stages. The project delivered on time and on target.

Key Success Factors

The project's success shows the critical necessity of using a consistent and comprehensive project management methodology. The key success factors were: -

1. Clear Project Planning
2. Senior Management Support
3. Appropriate Resourcing and Project Office Coordination
4. Systematic, Timely Reporting and Issue Escalation Process
5. Recognition of Achievement of Milestones
6. Comprehensive Communication Plan

1. Clear Project Planning

A project chart was prepared to define each stage of the MBCP Project. The chart of deliverables and milestone dates provided a clear focus throughout the project. The project was broken down into manageable "chunks" to enable realistic assessments of the time required for each. The milestone dates were then transferred to a "redlight" chart, which became the primary tracking mechanism during the project.

2. Senior Management Support

Large and complex projects need strong and visible support from senior management. The sponsorship and interest in the project by the senior leadership team was invaluable. Knowing that executive level management would receive a report, and knowing how "red light" status would be perceived, provided the ongoing motivation to business unit managers.

In addition to the reporting and escalation procedures, the key communications issued to staff about the MBCP project went out under the Managing Director's signature. Knowing that the project has visibility at the most senior level was a definite factor in the project's success, as was the visibility at the parent company level.

3. Appropriate Resourcing and Project Office Coordination

There were 22 business areas included in the MBCP Project. Each business area had to develop its own plans. Consistency of approach across the group was essential and all had to comply with the same timetable for the development and the testing of the various plans, according to the schedule set down.

An MBCP Project office was established. The Project Office's brief was to develop the plan formats, methodologies, testing protocols, provide facilitation and problem/issue resolution support to the business units as they completed the project. The Project Office was the liaison point to the parent company, APRA and ICA. The Project Office also fulfilled the traditional project tracking and reporting function.

It was realised that each business unit would need a part-time resource to coordinate the work required to complete the plans. The MBCP Coordinator was in nearly all cases an operational level staff member whose role consumed 25-80% of their time at different stages of the project

4. Systematic, Timely Reporting and Issue Escalation Process

The Project Office created a colour-coded spreadsheet that became know as the "redlight" chart. It was a simple, yet extremely effective matrix, which listed all of the participating Business Units on one axis and the key milestones/deliverables on the other. Each milestone/deliverable was coded with a green, yellow or red. Green showed that the milestone had been achieved; yellow indicated that it had not yet completed or had been rescheduled and red showed overdues. The Project Office updated the chart as the situation changed. This chart was tabled at weekly coordinators and monthly senior leadership team meetings. The redlight chart became the major tool indicating progress and status of each business area and thus that of the project as a whole.

The coordinators met each week with the Project Office. Each meeting followed an agenda set in advance by the Project Office and detailed minutes were recorded and distributed following each of the meetings. At the meeting, each coordinator presented a report on progress towards the next appropriate milestone.

5. Recognition of Achievement of Milestones

One of the keys to success in long projects such as the MBCP was to maintain the interest and enthusiasm of those who are working on the project for an extended time. At the conclusion of each stage of the project, the Project Office arranged a celebratory event and gift.

6. Comprehensive Communication Plan

The MBCP office established a page called "Millennium" on the company's Intranet. Throughout the project, update articles were placed on this page. Staff could then log on and pick up the latest information.

In addition to the Intranet site, the MBCP Project Office was careful to get some coverage in each issue of the internal company magazine. Photographs of milestone events and subsequent celebrations were taken and published with the associated articles.

An initial email was distributed to all staff from the Managing Director. Two colour informational brochures were also produced during the project. The first, with a message from the Managing Director was aimed at staff and informed them of the project, its aims and broad timetable. The second informational brochure was for customers, but was also distributed to staff for their information.