

Disasters....

Yes, They Can Happen to You

Identify and Protect your Vital Records

Keep your business floating, even when nothing is dry!

- **25% of small business do not reopen after a disaster.**
- **Managing your Vital Records can be quick and easy.**
- **3 Easy Steps**
 - Identify
 - Protect
 - Maintain
- **A Disaster Recovery Plan can keep your business moving forward in an emergency.**

Vital Records are those records that are essential to your business should a disaster strike. They might be your insurance documents, your employee phone list, your client and price list etc. As reported by the SBA in 2006 25% of small businesses do not reopen after a natural disaster. These businesses have not protected their vital records and can not continue to operate.

Protecting your vital records does not need to be difficult or time consuming and you will appreciate your effort if they are ever needed.

Where to start?

First, you need to identify

what records are Vital Records for your business. (See over for a sample list.) **Se-**



cond, you need to protect them. The key is to ensure a copy of the record is stored in a separate location away

from your primary place of business. Good locations to use are commercial record centers, branch locations or safety deposit boxes. Ensure that your location of choice provides adequate security and easy retrieval if necessary.

Third, continue to update your vital records to ensure they are accurate and relevant. You can keep a list of record types that you consider vital and every time one of those records is generated it can be copied and put in the vital records box to be sent to storage. Alternatively, commit to doing a monthly round up to stay on top of the new documents.

Disaster Recovery Plan

A disaster plan is a document that outlines your plan for managing in an emergency.

By pre-planning your course of action in a disaster your staff will be able to calmly continue to operate and keep your business running.

Your plan should outline:

- A pre-determined alternate meeting place in case your primary place of busi-

ness is unusable. The meeting place should have a functioning phone, fax and internet access.

- A Phone tree to contact all employees and give them direction.
- A list of suppliers to restock your inventory or equipment to continue to provide service.
- A list of duties to be performed and who will per-

form them—for example the receptionist will call to get your phone number transferred to an existing line at your new base of operations.

- The process to retrieve your vital records to restart your service as soon as possible.

Your Disaster Recovery Plan should be reviewed, tested and updated on a regular basis to ensure its effectiveness.

Identify your Vital Records

Accounting

- Accounts Receivable Listing
- Accounts Payable Listing
- Banking Information
- Insurance Policies
- Payroll Register
- Loans & Financing Documents
- Tax Returns
- Year End and Monthly Statements
- Inventory

Fixed Assets

- Purchase Documents
- Leasing Documents

Legal

- Contracts/Leases
- Articles of Incorporation
- Mortgages

Clients

- Customer Contact and Purchasing Information
- Customer Contracts

Sales & Marketing

- Prospect lists
- Active Quotes
- Market Research

Human Resources

- Benefit Plans
- Employee Contact Information

Production

- Suppliers contact and pricing information.



Protect your Vital Records

Copy your Vital Records and store them securely off-site.

You can photocopy, scan to a disk and do tape back ups.

The records need to be stored away from your primary business in a secure

facility that can offer you quick and accurate retrieval when the information is needed.

Modern commercial record centers offer online access to your inventory of stored records. You can list the

name of each file in each box which is perfect for keeping an accurate Vital Records program.

The record centre can deliver the boxes with your Vital Records to your new location or you can pick them up.

Maintain your Vital Records

Remember that your Vital Records will change as your business changes. Keep your vital records up to date.

Monthly:

- Test your computer back ups to ensure the information is restorable

Every Six Months:

- Review your Vital Records list and ensure you have captured all additions that have been created
- Ensure all appropriate members of your staff have an up to date Vital Records list so they know which records need to be captured.

Yearly:

- Emergency Contacts; update phone numbers and addresses for employees, customers and suppliers.
- Test your system. Practice makes perfect so review your plan and ensure it works and you can quickly get up and running again.

Phoenix Recycling Inc.

76 Hoka Street
Winnipeg, Manitoba
R2C 3N2

Ph: (204) 222-5096
Fax: (204) 224-2798
www.phoenixrecycling.ca

Thank you to "Organize your Office" by Teri J. Mark for the guidance for this piece.



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