SHADOW-PLANNER

Multi-Award Winning Business Continuity
Management Software

SHADOW
PLANNER

CONTENTS

SHADOW
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OUR PLATFORM

Designed by operational resilience professionals, for operational resilience professionals. Shadow-Planner is the business continuity management tool that takes the tiresome work out of your BCM programme, allowing you to focus your time on the things that matter and manage your program by exception.

Programme Management

Gain insights into the status of your programme in relation to policy compliance. Monitor updates, upcoming deadlines, and areas that require attention.

BIA

Define your important business services, critical business areas, products and more, and comprehensively map their critical dependencies both upstream and downstream.

Strategy

Define your recovery strategies for important business services, critical business areas, product, suppliers, IT services, locations and any other factors.

Planning & Reporting

Create step by step playbooks, integrate system data such as BIA, strategies and more into your BC plan, and generate program reports for enhanced visibility and analysis.

Exercising

Develop and manage your testing and exercising programme, define scope, objectives and capture outcomes and actions for thorough evaluation.

Contacts & Contact Groups

Efficiently manage staff contact information and establish emergency contact groups with assigned roles and responsibilities.

Records Library

Establish a comprehensive library containing essential information about your business, IT services, suppliers, resources, locations and more.

Admin

Access an administration area that allows you to configure policies, set timescales, define risk levels and more.

Import & Export

Establish and configure scheduled import profiles to seamlessly import data and effortlessly extract data from the system.

PROGRAMME MANAGEMENT

**Gain insights into the status of your programme in relation to policy compliance.
Monitor updates, upcoming deadlines, and areas that require attention.**

Key features of our multi-award winning platform include:

- Provides administrators with full visibility over the status of key elements of their programme

- Built on a task management framework, it allows administrators to easily monitor and examine the status of various program elements, including business impact analysis records, strategies, plans, exercises, and related activities

- The task management feature empowers administrators to create, oversee policies and approve workflows tailored to each record type in each program, accommodating diverse requirements

- A dashboard of your organisation's risk profile map provides provides visibility and oversight of identified risks in the business continuity program, with the ability to delve into detail for individual or clustered risks

- Seamlessly integrates action tracking into the program, allowing administrators to monitor actions from identification to closure, along with visibility into their status and owners

- Filter the program dashboard to display information specific to a particular organisational segment, offering a more focused view of status beyond the entire organisation

- Utilise the request tracker to monitor changes across the program and user base

- Users can submit requests for support or changes, such as adding a new supplier or IT service, directly within the system

- Automated notifications and reminders keep all responsible users, whether task owners or approvers, informed of changes made in the system, enhancing communication and accountability

BUSINESS IMPACT ANALYSIS (BIA)

Take charge of how business impact analyses (BIAs) are conducted in your organisation and program with Shadow-Planner's enhanced customisation options.

Enjoy the flexibility to conduct targeted BIAs on any aspect of your program by specifying:

- The record or group of records for the BIA, whether it's a department, function, location, supplier, IT service, or product/service

- The timescales for analysis using multiple time scale sets, tailoring them to match the BIA subject

- The impact assessment policy for comprehensive assessments tailored to specific divisions, organisational parts, geographies, or products/services

- The data and dependencies to capture in each BIA, allowing flexibility in detail and information collection by adding custom fields.

- All necessary information for your Business Continuity (BC) program, including general information about the BIA subject, completion of impact assessments, risk identification, and mapping of dependencies across your organisation

You can also:

- Conduct comparative analysis during dependency mapping, providing visual cues for inconsistencies or data issues

- Leverage the visual dependency map function to easily identify where requirements can or cannot be met across all dependencies. This powerful visual tool allows users to quickly assess challenges for further investigation
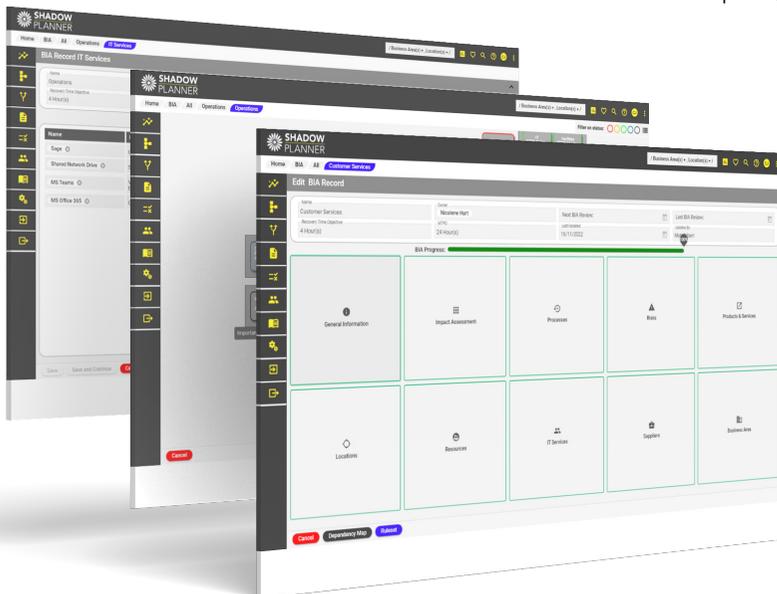
STRATEGY

Now, you can create strategy records seamlessly for any component of your business continuity program, just as you would in the Business Impact Analysis (BIA).

Tailor the data captured for each record to align with the specific needs or maturity level of your program. This flexibility allows you to optimise your strategy management and ensure a robust and adaptable approach to business continuity.

You can:

- Specify scenarios for record owners to document their strategies

- Include guidance notes to shape the captured information.

- Choose dependency sets from the BIA module to capture low-level recovery/workaround strategies

- Establish pre-defined strategy options for users to select for each dependency type

- Capture one or many strategies for each scenario in Shadow-Planner to reflect the resilience maturity within your organisation

- Analyse created strategies for gaps in other parts of your organisation, share best practices, and enhance overall resilience across the business

All this flexibility allows for strategies to be gathered against the high-level impacts (loss of people, premises, critical third parties, IT, cyber attack, product/service disruption etc.) as well as the granular level against individual dependencies (systems, resources etc.)
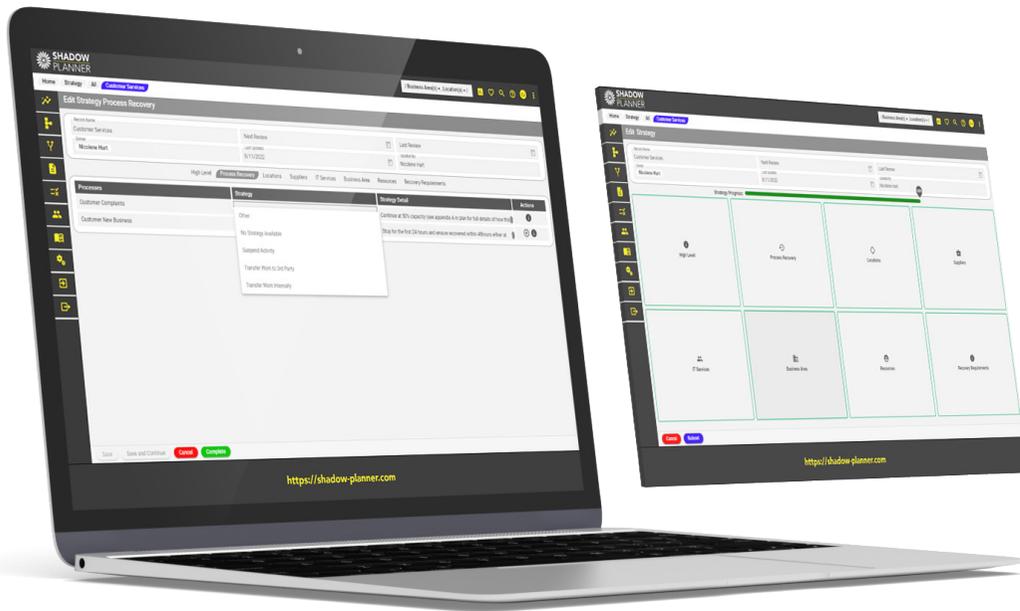
PLANNING AND REPORTING

Shadow-Planner simplifies the process of compiling data into plans and reports that can be easily distributed throughout the organisation.

The tool offers flexibility, allowing users to create documentation tailored to specific requirements, with the assurance that the data remains dynamic and can be updated with a simple click.

Plans or reports are built from a variety of components within the Shadow-Planner tool, they include:

- **Documents:** Upload or create documents in a folder structure to track program elements or use in multiple plans

- **Playbooks:** Develop custom playbooks with step-by-step guidance or crib sheets, detailing responsibilities and attaching relevant documents

- **Contact Groups:** Include contact groups in plans for cascading information or identifying specific teams or stakeholders, including critical suppliers

- **Shadow-Planner Data:** Integrate information from BIA records, multiple strategy records, exercise details, or the records library into plans or reports

- **Text Editor:** Add additional content, such as custom text or images, using the built-in text editor to bridge gaps between data sets and transform information into a cohesive plan

Shadow-Planner maintains a unique style sheet for each organisation, ensuring that content created through the planning and reporting module aligns with the established look and feel of other documents in the organisation. This includes colour schemes, fonts, headers, footers, and more, all customisable based on your individual style sheet.

EXERCISING

Shadow-Planner's exercising module offers a user-friendly and comprehensive exercising solution, streamlining the entire exercise lifecycle from planning and execution to analysis and reporting.
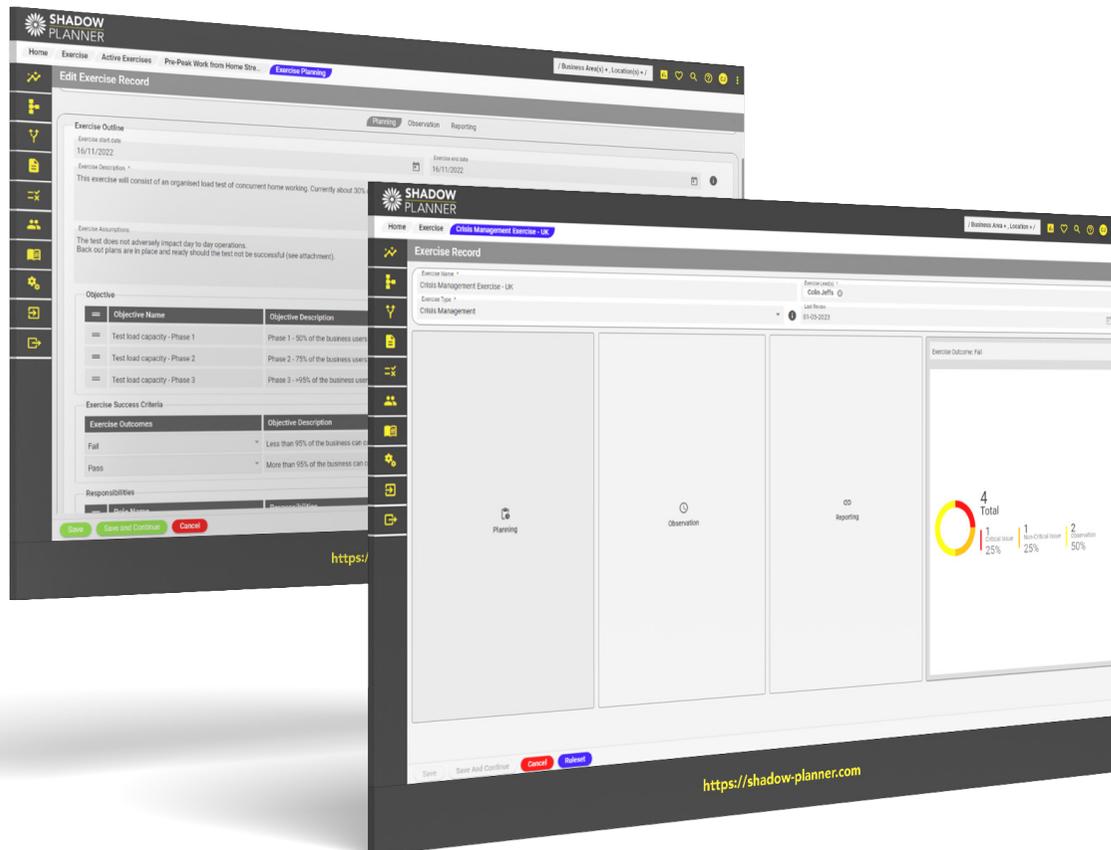

Our platform ensures organisations can efficiently manage and enhance their preparedness and resilience.

- Plan, design, implement, and track the completion of a BC testing programme

- Capture objectives, scope, success/failure criteria, exercise roles & responsibilities

- Upload any supporting documents for the exercise

- Capture and track all identified issues and actions through to completion, assigning action owners and target dates for closure

- Formulate test reports that consolidate all of the above

CONTACTS AND CONTACT GROUPS

Streamline the efficient management of staff contact information and the establishment of emergency contact groups with assigned roles and responsibilities using Shadow-Planner.

- Easily integrate your staff information into Shadow-Planner, allowing you to utilise it in emergency contact groups such as call cascades and crisis or incident response teams.

- Determine the specific data you want to incorporate, such as work and home telephone numbers, email addresses, and mobile numbers.

- Tailor your contact groups to meet your needs by creating roles within the group and assigning individuals to each role. This flexibility enables a customized approach to organizing and managing your emergency contacts.

- Take advantage of the integrated contact groups and staff information throughout various aspects of your planning and response efforts. Incorporate them into plans, designate individuals as task owners or approvers, and assign actions and risks as needed.

- Additionally, utilise the dedicated mobile app to seamlessly deliver contacts and contact groups to targeted users or groups. This comprehensive approach ensures that your organization can effectively leverage staff information in real-time during emergencies or critical incidents.

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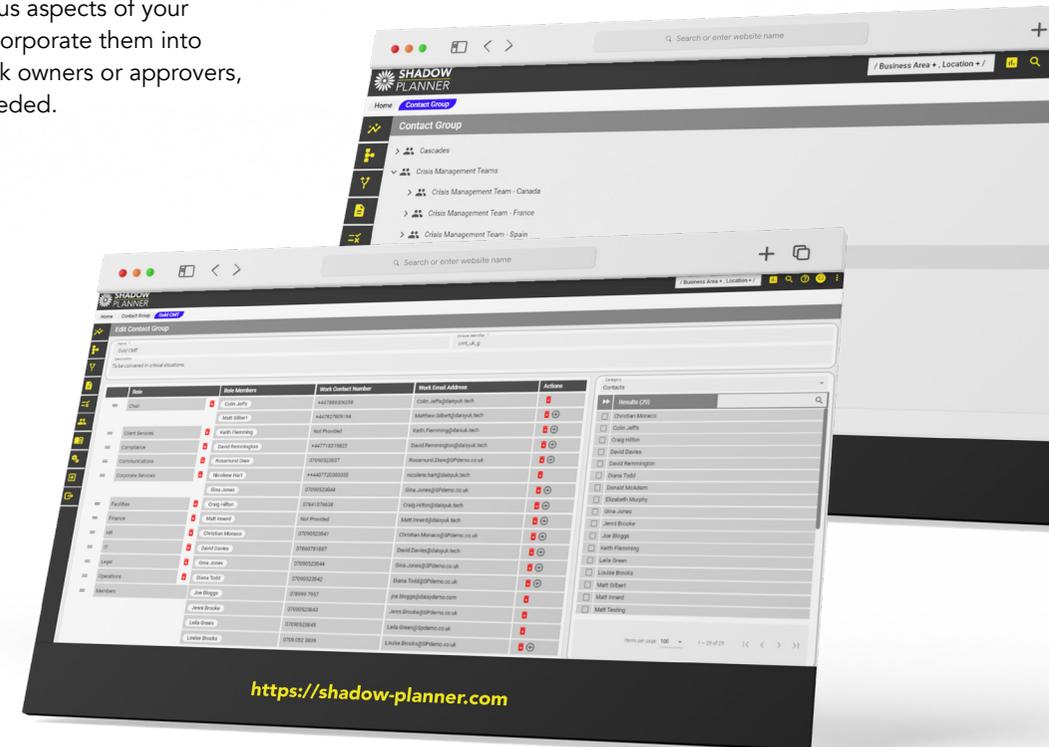
RECORDS LIBRARY

At the core of Shadow-Planner there is a records library, which contains the source data on which any organisation can build its programme.

The records library is made up of six categories:

- **Business Area:** this section is where your organisational structure (divisions, departments, teams) can be mapped into the system allowing you to plot data against the record relating to that area.

- **Location:** each of the places your organisation works from can be mapped into the system. Additional information about each site or specific playbook can be added against each record, that can be referenced in the planning & reporting module.

- **Product & Service:** dependent upon how you choose to define your products or services, this area is designed to capture them. These outputs being represented in the system directly allows for dependency mapping and exercise tracking against them, to help you understand your resilience for each of those critical products or services you provide.

- **IT:** all of the IT systems and services can be mapped out in Shadow-Planner and hold information relating to that service including backup provision details, technical recovery plans and any other supporting information.

- **Supplier:** the key information about your critical suppliers can be added into Shadow-Planner and linked to other items, contract information can be added against the records, contact information, and information about their capabilities and resilience can be recorded here and used in your planning and reporting

- **Resource:** this area allows the capture and categorisation of any other records you may need to capture and track within your programme. Be it equipment lists, critical documentation or skill sets, records can be created and managed in this category and then used in your wider programme.
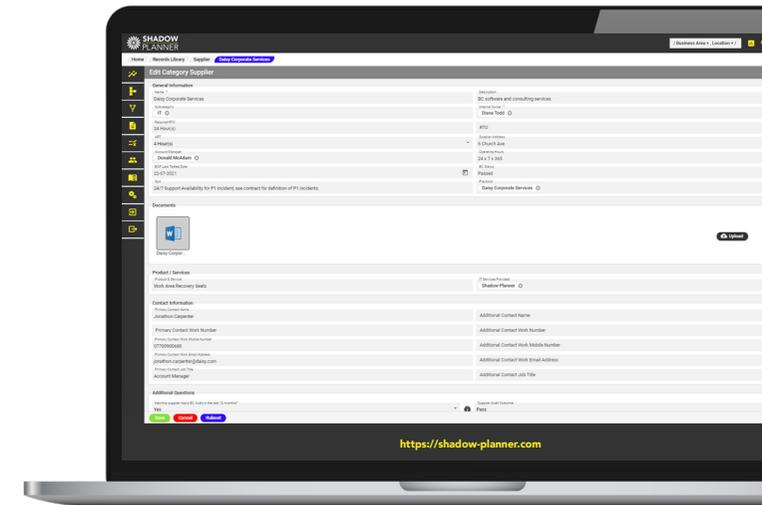
ADMIN

Within this administrative realm you can configure various critical areas, including;

- **Organisational Structure:** Define and structure the organisational hierarchy within Shadow-Planner

- **Security Profiles:** Customise security profiles to align with your organisation's access control requirements

- **Password and Multi-Factor Authentication Policies:** Set and manage policies related to password security and multi-factor authentication

- **GDPR and Privacy Policies:** Configure settings to comply with GDPR and privacy policies, ensuring data protection and privacy adherence

- **Mobile Profiles and Content:** Tailor mobile profiles and their content to optimise the mobile experience for users

- **Custom Fields:** Create and manage custom fields to capture essential data points

- **BIA Configurable Items:** Fine-tune BIA settings, including timescales, impact categories, recovery policies, risk levels, risk assessment matrix, and other configurable items

- **Programme Configurable Items:** Customise program settings, including task policies and automatic task reminders, to align with your workflow

- **Exercise Configurable Items:** Define and configure exercise-related settings, such as exercise types and outcomes

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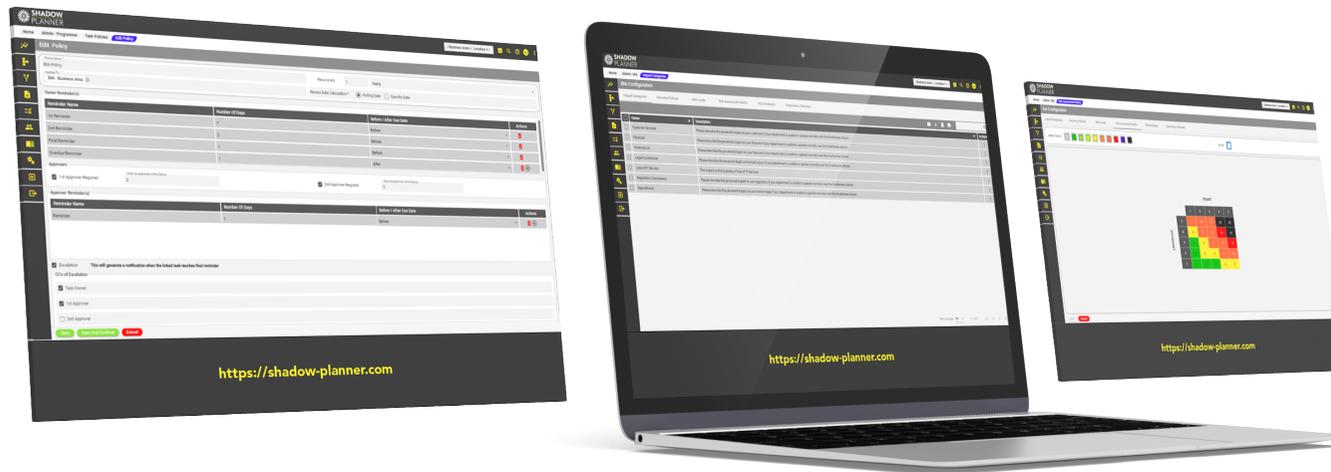
IMPORT AND EXPORT

Establish and configure scheduled import profiles to seamlessly import data and effortlessly extract data from the system.

Imports

Set up and customise scheduled import profiles to effortlessly bring in data, including contacts, on a scheduled recurring basis.

## Our import tool also enables you to:

- Generate import profiles for various entities, such as contacts and IT systems

- Specify the mapping of import fields within Shadow-Planner

- Schedule imports to execute at the desired frequency

Exports

Set up and configure scheduled export profiles to effortlessly extract data from the system, including BIA or risk data, based on your desired schedule.

API

Shadow-planner also has a full API pack for you to use if preferred.

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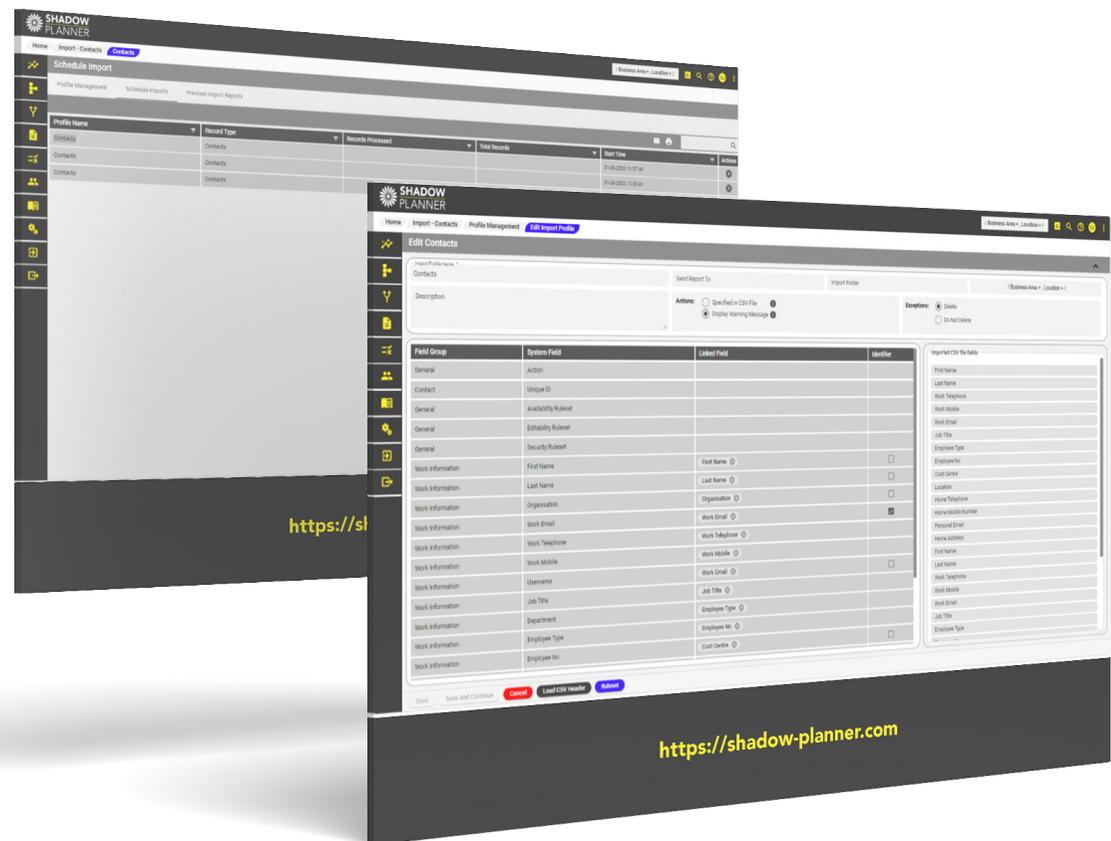
MOBILE APP

Effectively communicate vital information to specific users or groups through the dedicated mobile app, encompassing emergency contact groups, staff information, playbooks, documents, and plans.

You can also leverage mobile device functionality to initiate calls, emails, or SMS to individuals, as well as send emails or SMS to everyone or selected individuals within designated contact groups.
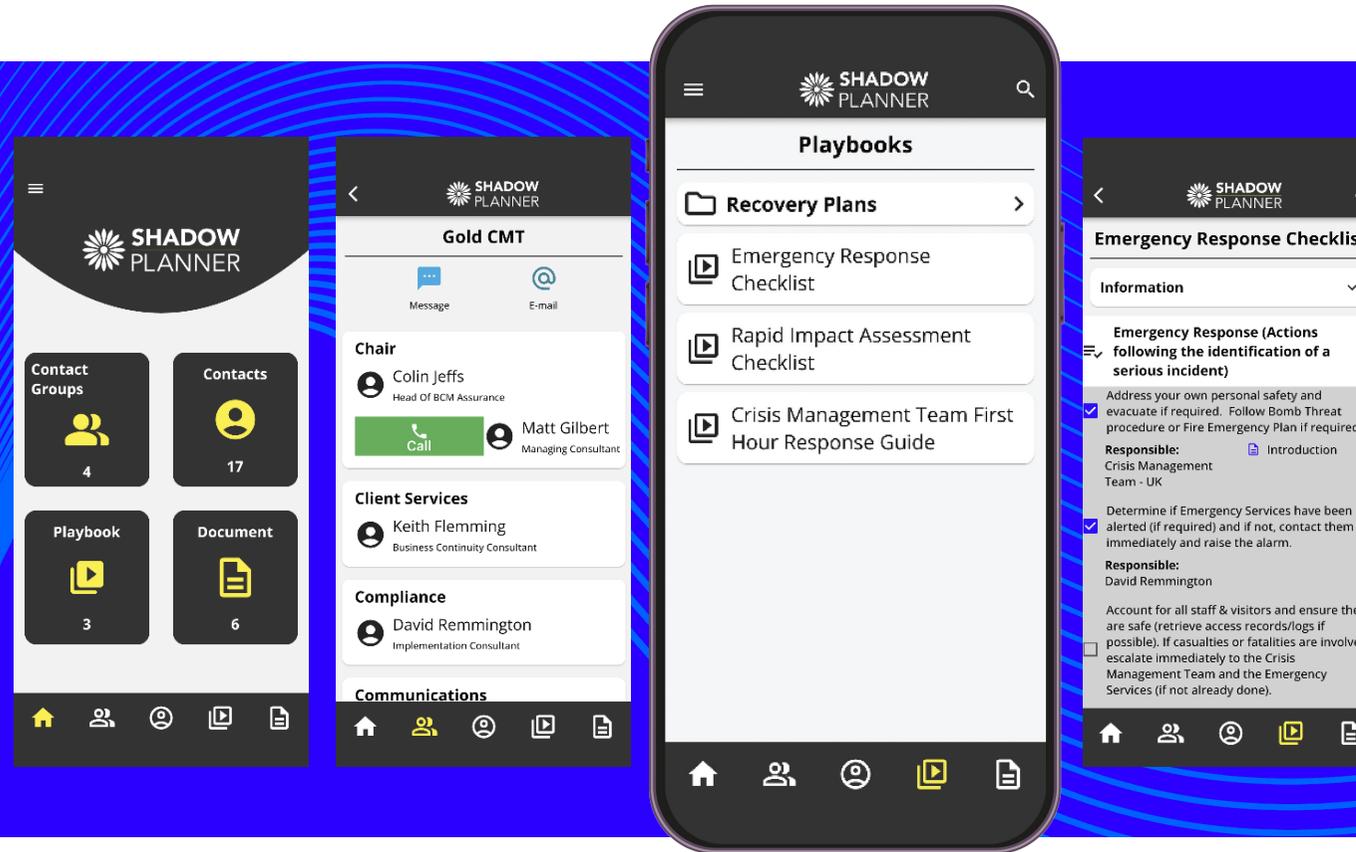
SMART, SIMPLE AND SECURE

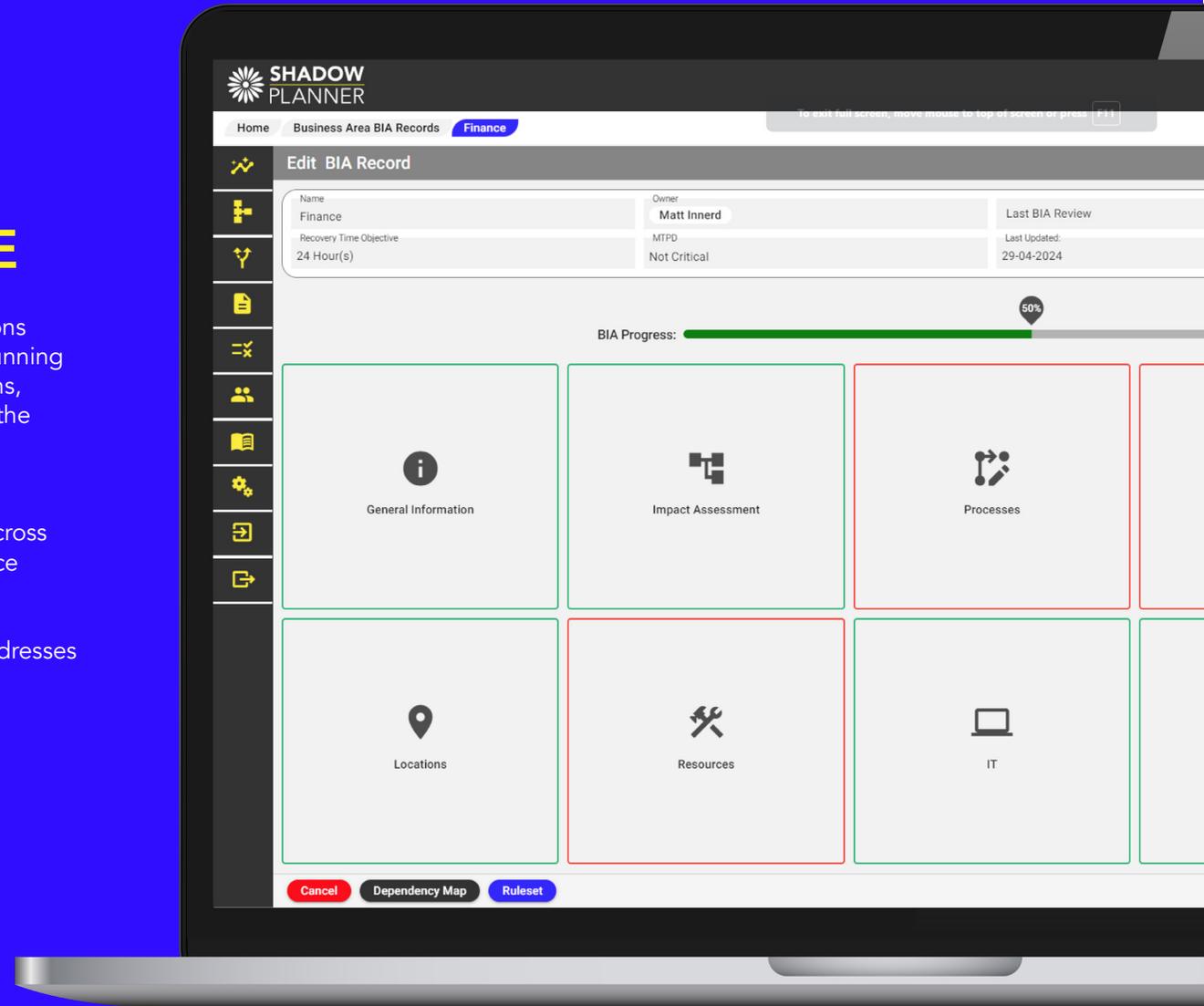Shadow-Planner is designed to help organisations manage disruptions effectively, enabling them to stay resilient and keep their business running smoothly. By leveraging its capabilities, you can develop robust plans, assess potential risks, and establish proactive strategies to mitigate the impact of disruptions.

Our experienced, BCI-certified consultancy team understand the complexities of maintaining operational resilience, having worked across many sectors as BCM practitioners while technological and workplace landscapes have evolved. This team has been instrumental to the development of Shadow-Planner, and as a result, it embraces all the benefits this current landscape offers, and at the same time, fully addresses the increased challenges it presents.

BOOK A DEMO

SHADOW PLANNER

Home | Business Area BIA Records | Finance

Edit BIA Record

Name	Owner	Last BIA Review
Finance	Matt Innerd	
Recovery Time Objective	MTPD	Last Updated:
24 Hour(s)	Not Critical	29-04-2024

To exit full screen, move mouse to top of screen or press F11

BIA Progress: ▬▬▬▬▬▬▬ 50%

- General Information
- Impact Assessment
- Processes
- Locations
- Resources
- IT

Cancel | Dependency Map | Ruleset

PLATFORM FEATURES

Taking the pain out of the entire process, Shadow-Planner helps your people work smarter, faster and enables your business to deliver against its resilience commitments efficiently and cost effectively. Designed by BC practitioners for BC practitioners, this suite of integrated software supports the entire business continuity management lifecycle – from impact analysis through developing strategies and plans to testing and reporting.

Daisy's Shadow-Planner enables you to map out your critical dependencies, understand any gaps in capabilities, create plans and playbooks and manage testing. It even provides oversight of your business continuity programmes' adherence to your policy, allowing you to manage by exception.

Data Analysis
Any BC programme is only as good as the data it holds and how this data can be understood and used effectively. Shadow-Planner empowers you to collect critical data within your organisation, analyse it and understand where there are gaps that could stop or impede recovery efforts.

Creating Supporting Frameworks
Understanding your BC data is one thing but putting it in the hands of your staff in a format that is easy to understand, follow, and use, is something that can often be difficult to get right – and this is exactly what Shadow-Planner delivers.

Developing Solutions
Strategy information is critical to understanding what you can do at the time of an incident to mitigate the impacts and support recovery efforts.

Proving Capability
It has often been said that an organisation's BC programme is only as good as its last test. Shadow-Planner has an intuitive exercise module that enables you to plan an exercise, capture observations, issues and actions that arise and then produce a final report on the exercise and its outcomes.

Assuring your Programme
Managing a BC programme can be a daunting task, but it doesn't have to be! Shadow-Planner has a powerful task management system that allows the programme manager to 'manage by exception'.

Managing Complex Organisations
Businesses by their very nature can be very complex, with varying levels of organisational structure, geographies, suppliers, IT systems and resources. Shadow-Planner is highly configurable, making it easy to replicate your organisation and put policies in place at any level.

HOW DO WE WORK WITH YOU?

We have dedicated business continuity/operational resilience professionals and implementation experts that will work with you to deliver the right deployment for your organisation. A dedicated support team are also on hand to assist you with any challenges you may encounter.

By integrating our knowledge of the software and business continuity with your knowledge of your organisation, together we can implement a robust and effective solution.

Shadow-Planner can help you overcome all of these challenges, and much, much more, so if any of these resonate with you, a demonstration would be worthwhile:

- You are starting from fresh and want a framework to work within that is aligned to best practice

- Your existing plans have become unwieldy, and time-consuming to manage and keep up-to-date

- Your BCM resource is being reduced

- You have no reliable way of communicating with employees during an incident

- Your plans are detailed but nobody can follow them

- Your IT recovery and business recovery plans are not aligned

- Your planning data is in a separate system

- You need to apply your agreed standards across multiple offices/ locations or territories

Book a Demo
Looking to revolutionise your business continuity management? Contact us now and a member of our dedicated team will be in touch to arrange a demo.

NEXT STEPS

If you want to find out how Daisy can help you to improve your cyber security, contact us on:

📞 **0344 863 3000**

Or if you're an existing customer, get in touch with your account manager directly.

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