CASE STUDY: HELPING A MEDICAL DEVICE COMPANY UPGRADE ITS IT/DR TESTING PROGRAM

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A leading manufacturer of medical devices was spending too much time on the wrong things in its IT/disaster recovery testing program—until MHA Consulting showed them an innovative way to leverage tabletop IT/DR exercises.

TURNING TO A TRUSTED PARTNER

This Fortune 100 medical device manufacturer had a sound business continuity management (BCM) program and a capable IT/DR team. However, its IT/DR testing program had grown stale, with the same limited set of applications and environments being tested year after year—and other important areas receiving little attention.

For many years, MHA Consulting had successfully worked with a division of the company that was previously independent, earning a place as a trusted advisor. The company chose to continue that partnership, based on MHA's deep understanding of DR techniques, commitment to matching the solution to the culture and needs of the client, and history of providing value.

CONDUCTING A REVIEW, IDENTIFYING GAPS

MHA conducted a comprehensive assessment of the company's IT/DR program, interviewing team members and reviewing documentation. Following the review, MHA identified two key areas where the company was using resources inefficiently and allowing the persistence of gaps that jeopardized its resiliency.

First, MHA found that the company was investing a disproportionate amount of its IT/DR resources into conducting recovery exercises at its data centers. These exercises provided value around meeting regulatory requirements but did not validate true functional recovery. They were also inefficient, with 80 percent of the effort going toward making sure the exercise did not negatively impact production. Only 20 percent was spent on recovering the DC. Unfortunately, the measures that were taken to safeguard production and ensure the exercises were successful sharply undercut their value. The modifications created an artificial environment that would not exist during a real event.

Second, MHA ascertained that the company's extreme focus on recovering its DCs—and the unvarying scope of its DC recovery exercises—came at the cost of many other aspects of its IT/DR program. MHA recommended a philosophical shift from the narrow goal of conducting recovery exercises at the DCs to the broader one of being able to achieve and validate functional recovery across the organization.

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MHA CONSULTING
WHEN SUCCESS MATTERS

INTRODUCING THE "TECHNICAL TABLETOP"

To help the company make this shift, MHA suggested an innovative solution: tabletop IT/DR exercises conducted at the application level.

Tabletop IT/DR exercises are different from the high-level tabletop exercises commonly performed in crisis management training. An IT/DR recovery tabletop is a technical walk-through aimed at determining technical recovery capabilities and identifying production-level gaps in strategy, implementation, dependencies, and overall capability.

Like conventional recovery exercises, technical tabletops can help identify gaps and validate recovery processes, infrastructure, and documentation. They can also identify issues that are often hidden when performing live recovery exercises that are executed in a test "bubble."

Technical tabletop exercises are less invasive and take less time to prepare and execute than live IT/DR recovery exercises. They permit a greater number of applications to be reviewed and more improvements to be made, heightening the level of enterprise recoverability.

In broad terms, MHA's effort for this client involved proposing a significant philosophical shift and suggesting an innovative technique to help in making it. The client recognized the validity of MHA's analysis and embraced its recommendations. Both MHA and the client understood that making the desired changes would involve a long-term effort by many people.

ADOPTING A NEW APPROACH

Before the engagement with MHA Consulting, the company had a general awareness that its IT/DR testing program was stale and not demonstrating true capability. MHA's efforts provided the company a clear view of the gaps in its program as well as insight into how to close them.

As the engagement continues, the client's team has begun confidently upgrading its IT/DR testing program. It is closing its gaps and spreading information about the new philosophy and techniques throughout the company. The company is excited about the potential for leveraging technical tabletop exercises to free up time and resources that can be used to improve functional recoverability more broadly.

MHA and the client continue their joint effort to help the company's IT/DR testing program evolve in a direction that will ensure it can truly accomplish functional recovery across the organization.

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