

Business Continuity Planning Checklist

Most disasters strike without warning. In order for your agency to operate during an emergency, a business continuity plan is key.

This checklist enables you to consider possible scenarios that will require immediate action in order to reduce loss and mitigate risk associated with a potentially crippling situation.



Step 1: Make a plan



Step 2: Protect your data in the cloud



Step 3: Stay connected to your insurer partners with IVANS



Step 4: Create a communications plan

Step 1: Make a plan

- Analyze possible threats to your business, i.e., fire, tornado, hurricane, earthquake, blizzard, tsunami, server crash, data breach, theft, human error, etc.
- Determine how your agency can and should respond to each threat listed.
- Identify specific situations that put disaster plans in motion when you are facing a threat.
- Create a “no warning” plan should disaster strike without warning.
- Involve your team in planning and communicate any updates to the plan as they happen.

Step 2: Protect your data in the cloud

- Host your management system and other applications in the cloud. Remote data centers provide optimal data protection and security.
- Convert paper files into electronic files when possible.
- Have one or more laptops set up to access your agency management system remotely.
- Consider purchasing a wireless hotspot to connect to the Internet through your cell phone provider should the Internet go down.

Step 3: Stay connected to your insurer partners with IVANS

- Quickly find and resend policies, claim details, and eDocs that have been downloaded in the past 90 days with [IVANS Exchange™](#).
- Leverage claims download via IVANS to receive detailed claims information directly in your management system to stay up-to-date with the claim adjustment and settlement processes.

Step 4: Create a communications plan

- Communicate to your clients through your website and social media pages. Provide contact numbers and instructions for claims.
- Research and decide if text communication is right for your agency staff and clients. If so, collect cell phone numbers and look into mass texting options.
- Have a plan for telephone calls to be re-routed in case your phone lines are down. A third-party call center or another office outside the disaster zone should take emergency calls.

About IVANS

IVANS is the property and casualty insurance industry's exchange connecting insurers, MGAs, agencies and insureds.

IVANS cloud-based software automates the distribution and servicing of insurance products. For more than 30 years, IVANS innovation and expertise have connected more than 30,000 independent insurance agencies and 380 insurer and MGA partners to enable millions of people to safeguard and protect what matters most in people's lives.

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