KPMG

KPMG creates robust disaster recovery program for financial services organization

Case study

Client industry	Client	Who should read
Diversified financial services	Large financial services institution	Executives considering an enterprise disaster recovery data plan

Client challenge

A major financial services organization needed to create and implement a disaster recovery solution using leading practices to ensure business continuity in case a major disaster affected its day-to-day operations. The organization was designing and implementing a disaster recovery data center in another part of the country, but needed to develop the processes and procedures to sustain the program and recover and restore IT services, enabling it to recover data and resume operations seamlessly if necessary.

Client results

KPMG LLP (KPMG) developed an industry-standard disaster recovery process. When the engagement concluded, the client had:

— A thorough, sustainable disaster recovery plan

— The ability to provide continued financial services to its customers

— A new data center that was online and available to get its system back if necessary

— An Information Technology (IT) team that was trained and able to manage an out-of-region data center.

KPMG advisor insights

Bad things sometimes happen to good organizations

Your organization is never going to be as ready as it needs to be unless you plan appropriately, exercise regularly, and train your people.

Business continuity and disaster recovery require a broad strategy

It is not enough to build a disaster recovery data center. Organizations need a robust program and strategy for recovering critical IT services and business operation if something bad happens.
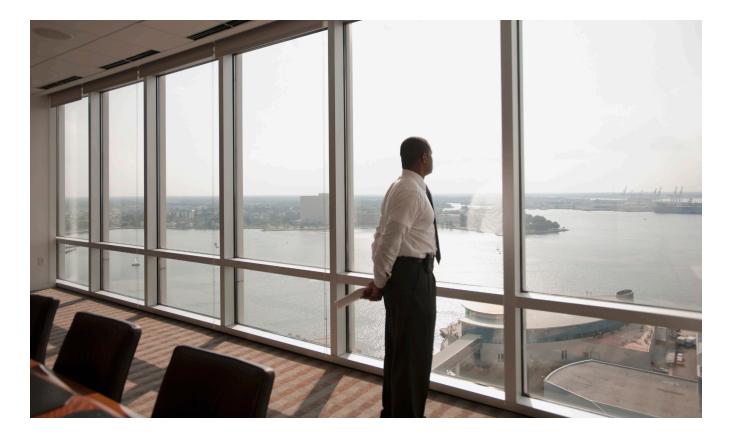
A disaster recovery plan should change with the business

A successful organization has to keep moving, and so do disaster recovery and business-continuity plans. The plans and processes must be tested and updated continually to meet the changing needs of the organization.

The project

With the development of an out-of-region data center under way, our client asked us to create a sustainable disaster recovery plan, help build the plans and processes to bring the new center online, and help ensure its team was prepared to maintain the on-going requirements. Our contributions included:

— Assessing the client's capabilities, identifying deficiencies, defining the future state, and creating a plan to reach its goals

— Developing an enterprise disaster recovery plan

— Creating a testing strategy and procedures to help ensure the plan was aligned with industry standards and tailored to meet the client's needs

— Validating the data recovery process and training people involved in the process.

— Designing a target operating model to sustain the new data center's capabilities, including governance, change management, communications, training and awareness, and a metrics dashboard for the organization's leaders

— Transitioning data center activities and knowledge to the IT organization and defining roles and responsibilities

If you are interested in learning more about this case study, or if you are experiencing similar issues, please contact us.

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