

# Best Practices in Business Continuity

## BAIRD

Milwaukee-based and employee-owned, Baird is a leader in wealth management. The company has more than 100 offices, 3,200 employees worldwide, and has been named on Fortune's list of 100 Best Companies to Work for 12 consecutive years. Company leaders felt compelled to maintain safety and continuity worldwide and invested in technology and best practices to improve business continuity.

### Highlights

- ▶ More than 100 offices on three continents
- ▶ Employee-owned wealth management firm with more than \$152 billion in assets
- ▶ Continually improving participation in annual exercises using xMatters



## Challenges

Business continuity posed a challenge for Baird, who operates in more than 100 physical offices in three continents. This equates to a lot of potential for a business continuity emergency, and being in an industry where security reigns supreme, they needed a leading solution that would provide them with solutions to technical and logistical challenges.

In 2010 when Pamela Volk joined Baird as a Senior Vice President and Business Continuity Manager, she quickly identified an issue. Only 30% of associates as their contact information in their system of record, and while a mass communication tool had been purchased, it had never been implemented. The technical and logistical challenges posed difficulties, as well as engaging international employees to make required changes.

## Solution

With xMatters integrated into Bairds system, once a crisis situation has started, operational business continuity falls into four distinct phases:

- ▶ Response: Notify people, mobilize teams, and begin business continuity activities
- ▶ Recovery: Bring critical business processes to an operational state
- ▶ Restoration: Facilities, IT and third-party vendors restore physical or technical environments for the resumption of normal operations
- ▶ Resumption: Return to normal operations or whatever the new normal is

The key throughout these four phases is communication.



Don't wait until an incident to test the system.

### PAMELA VOLK

Senior Vice President and  
Business Continuity Manager



## Gaining commitment

The response would only be as effective as the contact information in the system. So Baird and Erin Jodat, former Assistant Vice President - Business Continuity Analyst, set in place automated weekly updates from the PeopleSoft system.

The Business Continuity department is a team of two but has a network of 50 people, two people in every department worldwide. Only Business Continuity personnel log into the system. During an incident, they use xMatters to reach out to associates using a specific order of devices, starting with work email, work phone and mobile phone.



It used to take three hours to reach everyone. Now it takes just minutes.

**PAMELA VOLK**

Senior Vice President and  
Business Continuity Manager



## Benefits

Baird uses xMatters to kick off the majority of their exercises and rehearsals including a full building evacuation drill, where more than 1,200 associates quickly evacuated from 28 floors in the corporate office. Jodat initiated the mass notification from her iPad on the top floor. The drill involved local firefighters and police for support and inspections. “Both my husband and son are firefighters,” Volk says. “I don’t want them searching for people in a building when we can account for them in other ways.”

Volk says she learned a few lessons along the way as well:

- ▶ Don’t wait until the incident to test the system
- ▶ When it’s a life threatening situation where firefighters and police are involved, timeliness is important
- ▶ Some people don’t answer 800 numbers, so give them an Outlook contact card and customize the system so the caller ID shows your business number calling

Remember how only 30 percent of associates had their mobile numbers in the Business Continuity system? The drill garnered nearly 100 percent participation and started the evacuation within minutes. “That’s a huge deal,” Volk says. “It used to take three hours to reach everyone. Now it takes just minutes.”

## About xMatters

xMatters is a service reliability platform that helps DevOps, SREs, and operations teams automate workflows, ensure infrastructure and applications are always working, and rapidly deliver products at scale. Our code-free workflow builder, adaptive approach to incident management, and real-time performance analytics all support a single goal: the happiness of your customers.



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