

# RISK MANAGEMENT

## EXERCISE & EVENT MANAGEMENT

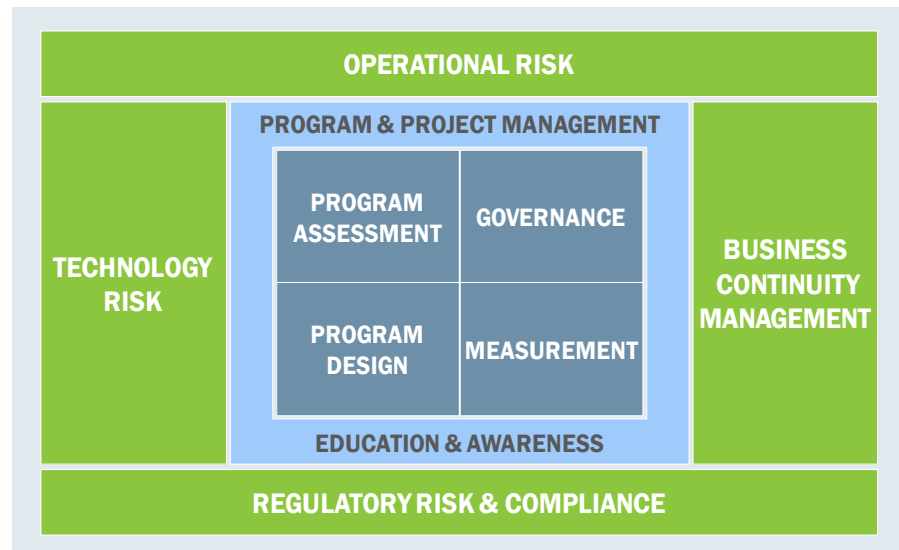
## EXERCISE & EVENT MANAGEMENT

Satori's Exercise & Event Management Approach draws on our program management and education and awareness expertise to conduct a one-time readiness assessment in preparation for a test, drill, or integrated industry exercise. One or more Satori resources establishes and leads a project management structure to coordinate pre-work, planning and execution of a risk management activity designed to test controls and demonstrate risk management readiness. Satori coordinates the activities of cross-functional participants, conducts a program assessment, establishes a governance structure for the event, plans and executes the program and conducts post event data gathering and analysis.

Throughout the engagement, Satori consultants use project management and communication tools to ensure that resources are organized and meeting deadlines.

**The Exercise & Event Management approach can be utilized to prepare for an event in any of our risk domains:**

- Operational Risk
- Technology Risk
- Business Continuity Management
- Regulatory Risk & Compliance



## BENEFITS

Effective business continuity testing exercises one or more functions and involves a scenario-based approach to assess the operational capability and use of tools, and resources that would be used in a real emergency. The less invasive Table Top Exercise familiarizes personnel with roles and responsibilities, the response plan, and the emergency management system. Simulated incident-based learning reveals planning strengths and weaknesses, is a source of education and training, demonstrates capabilities, and identifies policy, procedure, training or operational needs.

## CASE STUDY

As part of its Business Continuity Planning focus, a leading investment bank was committed to operating effectively during a potential long-term business disruption, such as a pandemic influenza. Planning for a long-term outage requires a different type of business continuity model. Rather than focusing on site recovery, a firm must disperse employees to minimize the risk of infection in the workplace. Regional handoff and home working capabilities ensure continued operations from alternate locations. Such dispersed capabilities are key components of a comprehensive recovery strategy.

The client engaged Satori because of its expertise in program and project management and, more specifically, because of our success in Business Continuity and Pandemic program initiatives. Satori's in-depth understanding of the client's culture helped it partner closely with stakeholders and executives to develop:

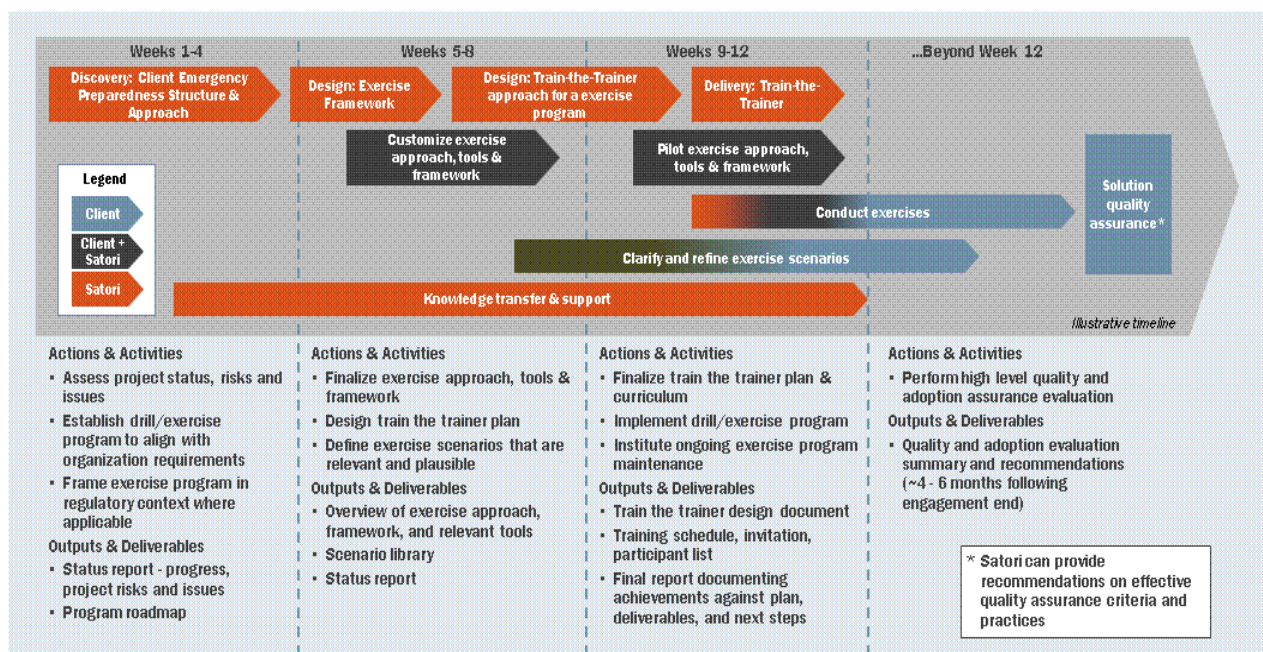
- A formal policy for the firm's global Home Working Environment
- Governing requirements and expectations for the employees and the firm
- A flexible and repeatable project management framework to deliver future tests of varying scope

### The Satori Solution

The client decided to execute a comprehensive Home Working Environment exercise program. To develop the policy, a needs analysis was performed, involving the executives from Business Continuity, Technology, HR, Compliance and Communications to identify key messages to deliver to employees. Satori investigated the existing client communication vehicles for the creation and dissemination of the program components. A communication matrix was created to lay out stakeholders, target audience, key messages, and delivery frequency.

## Satori-Managed Home Working Environment Exercises

- Establish project timeline, facilitated status meetings , and provided project status updates to the stakeholders during the preparation and execution stages of the project
- Manage a working group for exercise planning and execution that included representatives from technology, communications, human resources, compliance and other divisions
- Coordinate the identification of test participants with each business unit from all regions
- Create frameworks for communication with exercise participants and managers
- Establish a 24/7 help desk to support remote users during the test to mitigate business risk
- Develop a communications and escalation process to address potential crises that could disrupt the exercise
- Create a post-test survey to measure participants' effectiveness in communicating and working with local teams and their international counterparts
- Lead a post-mortem discussion on the test results, survey responses, lessons learned and developed an action item list for remediation of open issues



## RESULTS

As part of the engagement, Satori employed its Exercise & Event Management approach to organize and manage the first-ever global exercise involving approximately 1,400 participants across all divisions in all regions for two days to test the effectiveness of the firm's remote working capabilities. This initiative was critical and had high visibility within the firm: it was prominently featured on the front page of their internal website. Later, Satori managed an additional three-day exercise with more than 2,000

participants globally that included the testing of new telephony technology and pre-defined workflows.

As a result of our efforts, the client team was able to assess its remote working capabilities and demonstrate its viability to stakeholders. By helping the client proactively manage its business continuity risks, it was able to demonstrate an advanced level of readiness and preparedness.

*At Satori Consulting, our mission is simple: to work side-by-side with clients to discover opportunities and solve problems. We strive to provide both comprehensive and expert service, mindful of every client's unique needs. Our team of highly-skilled management consultants brings a wealth of industry and functional experience to provide wide-ranging services in project and program management, risk management, change management, organizational effectiveness, strategy and advisory, business process engineering, performance management, and infrastructure and technology.*



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