

SPOTLIGHT ON

# BUSINESS CONTINUITY MANAGEMENT SOFTWARE

## Top Considerations When Choosing BCM Software

BY TOMMY RAINEY



catalyst➔



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## PUBLISHER'S FORWARD

We appreciate the contributions of four BCM software vendors who helped us create this Spotlight. Their insights have illuminated vital aspects of business continuity management (BCM) software which ought to be considered when evaluating options. The executives in these companies are not just builders of powerful solutions. They are also industry thought leaders dedicated to operational resilience.

We intend the BCM Spotlight to equip our readers with questions to ask during an evaluation process. We are not ranking solutions nor are we vetting vendors. What is good for one organization might not fit another. We hope the following analysis will help you in your commitment to continuity and resilience.

A special thanks goes to Linda Hanwacker, The LSH Group. Her research on BCM Software formed the basis for our BCM Matrix.

As always, we welcome feedback. Email us at: [publisher@disaster-resource.com](mailto:publisher@disaster-resource.com)

Plates are never big enough when you go through a holiday brunch line! We must make choices and leave some good stuff behind. In 2016, the options and features of BCM software are both tempting and overwhelming, but you don't necessarily need it all. And the right software for your organization can add tremendous value to your company's BC program. But how do you choose?

This article, accompanied by an extensive matrix (pages 30-38), will offer the following:

- Helpful insights whether you have or do not have BCM software
- What BCM software will not do
- When is BCM software appropriate
- Suggestions for the evaluation process
- Important features and benefits for consideration

### Why This Spotlight is For You.

This article, and much of the BCM Software Spotlight, will be tailored for the organization considering a new implementation of a BCM software solution. However, if you already have a solution in place, before concluding

this Spotlight won't benefit you, consider the following situations:

#### 1. WE ARE HAPPY WITH OUR BCM SOFTWARE!

If you are pleased with your existing solution, the features and analysis in this Spotlight could reveal new functionality that would benefit your organization. These new features could be included in your existing software but not yet implemented. Or these features might address needs you didn't know could be solved with an alternative solution. In the fast-changing tech world of today, yesterday's solution will not necessarily be today's best option.

#### 2. WE ARE NOT HAPPY WITH OUR BCM SOFTWARE!

One key concern for the organization looking to switch solutions would be the risk of trading known shortcomings for unknown ones. It is very tempting to see another vendor's approach to a problem and become enamored with that particular improvement. This could lead you to glide through the comparison process, overlook some key benefits of your existing solution missing from the new, and draw an irrational conclusion that a switch is justified. This Spotlight is intended to touch on a very broad set of considerations as you make your decision. Take advantage of this collection of insights from the leaders in this field as you carefully evaluate the best fit for your organization.

## What BCM Software Will Not Do

### DON'T EXPECT A MAGIC BULLET!

The effective implementation of a BCM software solution can do many things for your organization, but first consider what it will NOT do. It will not take a ragged BC program and clean it up and make it good. Evaluating risks, understanding business processes, prioritizing both mitigation and recovery, and much more must all occur with or without software before a BC program can be effective. BCM software can help organize the complexities and it can help in the management and upkeep of your program. It can automate some complex processes such as crisis communications. Having the content digitized and available across many platforms can certainly increase resilience. However, BCM software is not a quick fix for a flawed program, nor will BCM software add value apart from significant effort on your part. Also, it is not a substitute for top management buy-in and widespread support across the management team. Get those in

place, and BCM software will likely be a great benefit to your organization.

A painful story was published by one author in CSO:

"I was hired as a Business Continuity Manager for a national healthcare organization and was provided with a software package that I was to implement nationally. The time investment this particular software required was tremendous. In fact, the investment was so great that we scrapped it two years into its development. A significant waste of time, money, and energy for all involved, with my reputation on the line (though I was not even part of its selection)." <sup>1</sup>

### When is BCM Software Most Beneficial?

#### WHICH ORGANIZATIONS WILL BENEFIT THE MOST?

There are two options for a BCM program. Using existing office software such as Word and Excel certainly appears attractive. Immediate costs are essentially zero, as everyone has access

to this software and they do not need to be trained. However, this apparent cost saving can quickly be negated. Multi-location organizations will find coordination and input cumbersome. It will be difficult to get consistent plans with updates and modifications likely happening at each location. If your organization has regulatory requirements, reporting can become a critical function, and most office-suite or DIY solutions will not generate reports sufficient to meet regulations.

One industry study<sup>2</sup> suggests the costs of implementing a modern BCM platform could be less than a quarter of the costs of a DIY approach. Maintaining the information that is critical to your continuity program will be significantly greater with the DIY approach when multiple locations or multiple BCM components are saved in various locations.

Most business continuity professionals today would say the DIY approach is only appropriate in smaller organizations with one, or at most a few,

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Catalyst is a fully integrated, end-to-end business continuity planning software – unlike any other currently available on the market today!

Catalyst combines Avalution's consulting methodology with a simple user interface, on-screen help guides, and customizable templates to make the entire business continuity and IT disaster recovery planning lifecycle easy and repeatable for any organization – regardless of size, industry, or geography. Even better, Catalyst scales to fit each organization's unique needs.

#### FEATURES:

business impact analysis, risk assessment, plan development, exercising, automatic metrics and reporting, live incident management, and built-in emergency notification.

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- Delivers the fastest implementation on the market
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locations, and then only if the organization does not have regulatory reporting requirements. Other organizations would significantly benefit from BCM software. The critical issue is selecting the software which is best for your organization.

### Suggestions for the Evaluation Process

#### EVALUATION PROCESS APART FROM FEATURES...

As you evaluate options, consider the following overall issues when you talk to providers:

- 1 Can you see demos of the software, or better yet, see an actual live installation? Review training materials and operating instructions?
- 2 Is your company considering any changes in other software which could impact how it links or works with the BCM software you are considering?
- 3 Can you get references from the provider? Can you discuss with the references what they find valuable in the software and then compare their priorities to your own to see if their assessments are relevant to you? They may be thrilled with the API to Salesforce, but you may use a completely different, hosted CRM – making that feature irrelevant to you.
- 4 With the widespread availability of information both on the internet but also through professional organizations, can you locate a user of the software you are considering, not provided as a reference, and find out their opinions?
- 5 When talking to a user of the software, ask hard questions! What do they wish could be different about the software...something it will not do but they wish it could? Are they happy with the tech support? What about any customizations, and how did they go? Finally, ask about budgets – did implementation cost what they projected and has the cost of maintaining the plan met expectations?
- 6 Is it possible to find someone who decided against a certain software... whether they actually purchased it and had to abandon it, or just opted to buy elsewhere after their evaluation. What was the problem?
- 7 Is the software company you are considering financially strong, with a track record? Do they have customers similar in size, and with similar regulatory requirements, to your own?

### The Big Picture: Features and Benefits You Need to Consider

#### FUNCTIONAL CONSIDERATIONS

The next sections of this article will touch on feature considerations. A more complete list of options, as well as detailed descriptions, is available in the Spotlight charts and in links provided in the charts.

#### EXISTING DATA SOURCES

Getting the various business records into the BCM software is critical during rollout. In addition to a list of applications you will need to access,



## RPX is a BCM platform that is used by enterprises in all industries, both public and private, since 1999.

RPX addresses compliance requirements, operational concerns, managing a maturing BCM program, improving preparedness and meeting an organization's particular requirements. The RPX software is designed to be utilized by all types of users, from the experienced Planner to the casual user. Our proven methodology meets all pertinent BCM frameworks and regulations, is easy to follow and implement, and has been tested, audited and successfully executed.

RPX is an all-in-one, fully integrated web-based software suite for Business Continuity Management Planning, Disaster Recovery, Crisis/Incident Management, Emergency Notification, Risk and Vendor Management. Our native

mobile App, called H.E.L.P., syncs with RPX and provides an organizations' employees personal preparedness and recovery – great for Workforce Resiliency!

It is not only about the product – Customer Support is paramount to us. Our caring, responsive and dedicated customer support is proven by long-term relationships with our customers; the longevity of the company and RPX, and numerous third party accolades. From the completeness and innovativeness of the RPX product, to the committed customer service support, to the high quality hosting operations and performance, RecoveryPlanner is a strong and recognized provider.

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it would help during the evaluation to have samples of the data that the application stores to compare with the BCM software's database. Will this be a manual process and if so, how many hours will this require? Are there APIs already available from the BCM software vendor to access the applications, or will custom programming be required? And if the latter, can you get firm costs for this work?

**POWERFUL. COMPREHENSIVE. EASY. PICK ANY TWO?**

This author frankly laments the day Microsoft decided to make Word into a program that can do everything under the sun...don't need it. As you look through a long list of features available, will they really help you? And while they might be nice to have, are you set up to create the inputs and maintain the data necessary? It all takes time. Thus it may serve you to look through the feature sets and prioritize those that would have the most impact on your

program. Then evaluate the ease of use for those features and from that derive the effort (time and money) required to implement those. This will undoubtedly be an iterative process requiring input from others on your team, and probably a number of Q&A sessions with vendors. From this process, a list of Must Have's and Really Want's will help narrow your selection, and your likely cost for the program.

**SECURITY? AVAILABILITY?**

Who will be using the software, where will they be, and on what device? Your company's security requirements may limit some of your choices here. But if remote hosting or SaaS is an option, what security and backup will be provided by your vendor? Many companies were surprised during Sandy when backup locations, too close to the primary office, were impacted by a regional event and unavailable when needed most. What level of redundancy do you consider sufficient,

and how can you verify the claims? Are third-party audits being done and are those available for review?

**CLEAN DASHBOARD?**

During a critical incident, focusing on the critical issues is essential. Given the varied and complex pieces that will be managed during an event, is it possible to get the display or dashboard that YOU want? Can you customize the display of information for the software or will this require vendor programming? What about on-the-fly changes that might be required for unusual incidents...can reporting be adjusted easily? What level of training will be required of users to achieve these capabilities?

**COSTS. JUSTIFICATION AND ROI**

Be sure and compare options by getting total cost of ownership of each software package, including not only the software but also the initial process of inputting data, training, and annual

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upkeep. Can the vendor help you assess not only the software costs, but the costs they expect your company will incur at each step along the way for employee labor or other software modifications? If a DIY program is considered an option against which you are comparing BCM software, have you factored in updates and reporting?

In addition to these specific and measureable (direct) costs, there are other factors which, though difficult to assess, could dwarf these direct costs. Would a software package likely speed recovery or offer other savings in the event of a crisis and can those be included in the ROI? What level of support is offered during rollout? What will the cost be for future support?

#### UPGRADES?

While it is assumed upgrades during a year which includes maintenance will be included, what about additional changes to any customizations done? How will changes to custom APIs be handled? What about upgrades on

the other side...when your company's other applications are upgraded, how will the availability of critical data be affected?

#### The Best Information is Yet to Come

The BCM Software matrix and comparison in the next 8 pages outlines 14 major categories with 168 criteria. Good news -- the 168 criteria can guide your RFP process or serve as questions for your vendor interview.

We trust the BCM Spotlight will help your organization decrease risk and increase resilience!

#### FOOTNOTES

<sup>1</sup> Does My Company Need Business Continuity Software? Stieven Weidner, CSO Online.

<http://www.csoonline.com/article/2131090/emergency-preparedness/does-my-company-need-business-continuity-software-.html>

<sup>2</sup> Calculating the True Costs of Business Continuity Management Plans, 6 Deep-Dive Considerations for Comparing BCM Software Platforms

<http://www.sungardas.com/Documents/business-continuity-software-considerations-SFW-EBO-015.pdf>

#### FURTHER READING ON BCM SOFTWARE

##### Tips from Industry Veteran Paul Kirvan

Kirvan says, "Early disaster recovery planning software came in several forms: fill-in-the-blank templates, checklists or automated systems using a common database structure. But many of these templates and checklists provided little guidance and were difficult to use. Today the content and capabilities of disaster recovery plan development tools have been significantly enhanced. Specialized products designed for complex activities like business impact analyses are also available. Some products boast compliance with industry standards".

From Paul's blog at TechTarget, you can access the following:

- Learn the pros and cons of using business continuity software and how to integrate it
- Tips for implementing business continuity software
- Integrating the software into business continuity management operations



## FairchildApp was recently presented the "Innovation of the Year" Award by the Business Continuity Institute – BCI.

The FairchildApp provides the perfect combination of simplicity and power enabling organizations to unify Business Continuity and IT Disaster Recovery planning with IT Service Management. It is a certified App available thru ServiceNow via the AppStore and is built on the ServiceNow Platform. The application provides enterprise-wide planning capability with integrated Business Impact Analysis (BIA) functionality.

The BIA allows users to identify critical business processes, calculate their Recovery Time Objectives (RTOs), and assign their enterprise criticality. FairchildApp allows the graphic mapping of dependencies between

hardware, applications, processes, vendors, contracts, telecommunications, and locations.

FairchildApp also automates the identification of risks and supports resiliency planning efforts in various plan types, such as Business Continuity (BC), Disaster Recovery (DR), Incident Management (IM), and Crisis Management (CM). FairchildApp is the most powerful planning tool on the market. Built on the ServiceNow Platform makes it simple to install, administrate, and use.

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"Servicenow and FairchildApp will give us complete visibility and control of our it disaster recovery processes. It's that simple." – Maria Rothstein, Dr Analyst & Itsm Office Manager

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# 2016 BCM SOFTWARE FEATURES MATRIX

	CATALYST by Avalution Consulting	FAIRCHILDAPP by Fairchild Consulting	RPX by RecoveryPlanner	SUSTAINABLE by Virtual Corporation
<b>CATEGORY 1 General Features</b>				
<b>Which features are included in the solution?</b>				
Includes Program Governance	✓	✓	✓	✓
Includes Business Impact Analysis	✓	✓	✓	✓
Includes Risk Assessment	✓	✓	✓	✓
Includes Plan Development	✓	✓	✓	✓
Includes Exercising / Testing	✓	✓	✓	✓
Includes Automated Metrics & Reporting	✓	✓	✓	✓
Includes Crisis/Incident Management	✓	✓	✓	✓
Includes Emergency Notification	✓	✓	✓	✓
<b>Hosting</b>				
Provides a SaaS solution	✓	✓	✓	✓
Provides a locally installed solution with option to install software behind client firewall		✓	✓	✓
Provides a browser based solution (no local client software installation requirement)	✓	✓	✓	✓
Supports prominent browsers: IE, Chrome, Firefox, Safari	✓	✓	✓	✓
Offers dedicated database	✓	✓	✓	✓
Offers shared database	✓	✓	✓	
<b>Standards Compliance: Support for industry standard practices in BC, DR, IT &amp; incident management</b>				
Supports ISO 22301	✓	✓	✓	✓
Supports NFPA 1600	✓	✓	✓	✓
Supports FFIEC	✓	✓	✓	✓
Supports other standards	✓	✓	✓	✓
Includes evaluation of resilience program maturity	✓	✓	✓	✓
Includes history logs	✓	✓	✓	✓
<b>Access &amp; Integration</b>				
Able to access tool from computer	✓	✓	✓	✓
Able to access tool from tablet	✓	✓	✓	✓
Able to access tool from mobile phone	✓	✓	✓	✓
Software is mobile optimized	✓	✓	✓	✓
Provides access to mobile app for offline viewing	✓	✓	✓	✓

CONTINUED ON NEXT PAGE

	CATALYST by Avalution Consulting	FAIRCHILDAPP by Fairchild Consulting	RPX by RecoveryPlanner	SUSTAINABLE by Virtual Corporation
Offers multi-user application ("unlimited" users with concurrent access)	✓	✓	✓	✓
Offers API access	✓	✓	✓	✓
Able to integrate with 3rd party tools and applications	✓	✓	✓	✓
Allows Single Sign On (SSO)	✓	✓	✓	✓
<b>Import and Export</b>				
Able to import and export data from external sources such as a Microsoft Excel spreadsheet	✓	✓	✓	✓
Able to import data from unlimited number of external file types	✓	✓	✓	✓
Allows access to complete data table schema		✓		✓
Able to easily export any data from the tool	✓	✓	✓	✓
Can import data dynamically from other sources, such as databases	✓	✓	✓	✓
<b>Provides a Library of Templates</b>				
Provides templates for policy	✓	✓	✓	✓
Provides templates for BIA	✓	✓	✓	✓
Provides templates for planning	✓	✓	✓	✓
Provides templates for exercising	✓	✓	✓	✓
Able to create new templates, from scratch	✓	✓	✓	✓
Able to duplicate templates	✓	✓	✓	✓
<b>Additional Features</b>				
Provides easy navigation throughout the tool	✓	✓	✓	✓
Includes multi-language capability	✓	✓	✓	✓
Provides customizable user roles and groups	✓	✓	✓	✓
Allows clients to view and change data table schemas	✓	✓		✓
Provides charts and graphs	✓	✓	✓	✓

Click below to learn more about **General Features**



Catalyst



FairchildApp



RPX



Sustainable Planner



CATALYST  
by Avalution Consulting

FAIRCHILDAPP  
by Fairchild Consulting

RPX  
by RecoveryPlanner

SUSTAINABLE  
by Virtual Corporation

## CATEGORY 2 Security such as encryption, login and permissions

Provides lock out feature after a failed number of login attempts	✓	✓	✓	✓
Provides role-based security	✓	✓	✓	✓
Supports encrypted passwords	✓	✓	✓	✓
Includes "Forgot my Password" feature	✓	✓	✓	✓
Allows client to define password strength parameters			✓	✓
Allows data encryption in transit	✓	✓	✓	✓
Allows data encryption in at rest	✓	✓	✓	✓

Click below to learn more about **Security**

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## CATEGORY 3 Risk Assessment/Management provides area to document threats maybe preloaded or part of a Business Impact Analysis

Provides list of key threats and vulnerabilities	✓		✓	✓
Provides strategy options for common risks and documents the recovery strategy	✓	✓	✓	✓
Captures and assesses risks related to business and technology operations	✓	✓	✓	✓
Captures and associates risk responses and controls to risks	✓		✓	✓
Sets the stage for developing business continuity strategies and plans	✓	✓	✓	✓
Includes risk register	✓		✓	✓
Provides technology modeling	✓	✓	✓	✓
Includes operational risk assessment	✓		✓	✓
Includes facilities risk assessment	✓		✓	✓
Automatic analytics	✓		✓	✓

Click below to learn more about **Risk Assessment/Management**

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  FairchildApp
  RPX
  Sustainable Planner

## CATEGORY 4 Business Impact Assessment that supports surveys and/or interview approach

Includes customizable BIA template	✓	✓	✓	✓
Captures critical business functions	✓	✓	✓	✓
Captures recovery time objectives (RTO)	✓	✓	✓	✓

CONTINUED ON NEXT PAGE

	CATALYST by Avalution Consulting	FAIRCHILDAPP by Fairchild Consulting	RPX by RecoveryPlanner	SUSTAINABLE by Virtual Corporation
Captures recovery point objectives (RPO)	✓	✓	✓	✓
Provides BIA summary report	✓	✓	✓	✓
Includes visual mapping of dependencies	✓	✓	✓	✓
Allows unlimited imports of data from external sources for use in reports and workflow	✓	✓	✓	✓
Includes Gap Analysis	✓	✓	✓	✓
Provides what-if scenarios for impact analysis	✓	✓	✓	✓
Provides RTO/RPO Analysis	✓	✓	✓	✓
Includes multiple impact calculation types	✓	✓	✓	✓
Captures application, facility, supplier, department dependencies	✓	✓	✓	✓
Captures recovery staffing and resource requirements	✓	✓	✓	✓
Provides suggested strategy options for common risks and documents the recovery strategy	✓	✓	✓	✓
Able to set update and approval frequencies that automatically notify BIA owner of the task, and admin when completed or overdue	✓	✓	✓	✓
Documents audit trail of changes	✓	✓	✓	✓

Click below to learn more about **Business Impact Assessment**

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  FairchildApp
  RPX
  Sustainable Planner

### CATEGORY 5 Plan Creation (Customizable, supports other plans and goals of organization) & Maintenance (Covers revision history and testing)

Able to customize plan templates	✓	✓	✓	✓
Enables the creation of Business Recovery Plans	✓	✓	✓	✓
Enables the creation of Crisis Management Plans	✓	✓	✓	✓
Enables the creation of Crisis Communications Plans	✓	✓	✓	✓
Enables the creation of IT DR Application Recovery Plans	✓	✓	✓	✓
Enables the creation of ITDR Infrastructure Plans	✓	✓	✓	✓
Utilizes data from the BIA and risk assessment	✓	✓	✓	✓
Allows web-based plan development	✓	✓	✓	✓
Able to easily create and edit plans	✓	✓	✓	✓
Captures restoration and recovery information such as processes and checklists based on resource loss type	✓	✓	✓	✓

PLAN CREATION CONTINUED	CATALYST by Avalution Consulting	FAIRCHILDAPP by Fairchild Consulting	RPX by RecoveryPlanner	SUSTAINABLE by Virtual Corporation
Captures recovery needs and requirements, such as equipment, supplies and vital records	✓	✓	✓	✓
Includes single button plan generation	✓	✓	✓	✓
Documents audit trail of changes	✓	✓	✓	✓
Able to attach multiple file types to plans	✓	✓	✓	✓
Able to test changes to templates, pages, fields before elevating to "active"	✓	✓	✓	✓
Able to set update and approval frequencies that automatically notify plan owner of the task, and admin when completed or overdue	✓	✓	✓	✓

Click below to learn more about **Plan Creation**

 Catalyst
  FairchildApp
  RPX
  Sustainable Planner

## CATEGORY 6 Incident/Crisis Management & Recovery Site

Provides access to contact and vendor lists	✓	✓	✓	✓
Captures notification/escalation criteria	✓	✓	✓	✓
Enables incident response	✓	✓	✓	✓
Utilizes NIMS-ICS structure for incident management	✓	✓	✓	✓
Able to customize structure and terminology for Incident Management	✓	✓	✓	✓
Includes recovery site layout plan	✓	✓	✓	✓
Includes dynamic incident management	✓	✓	✓	✓
Includes dynamic questions setting/reviews	✓	✓	✓	✓
Includes workflow management with email alerts and reporting	✓	✓	✓	✓
Includes Situation Status dashboards to track impacts, status, assignments	✓	✓	✓	✓
Able to upload multiple file types to event tracking	✓	✓	✓	✓
Provides an online portal to collaborate and manage a disruption	✓	✓	✓	✓
Allows plans to be activated and become working documents for response and recovery personnel	✓	✓	✓	✓
Able to submit issues and questions through an activated plan to raise and document an issue	✓	✓	✓	✓

Click below to learn more about **Incident/Crisis Management**

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  Sustainable Planner

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	CATALYST by Avalution Consulting	FAIRCHILDAPP by Fairchild Consulting	RPX by RecoveryPlanner	SUSTAINABLE by Virtual Corporation
<b>CATEGORY 7 Emergency/Mass Notification</b>				
Able to notify people via phone, email or text message based on various notification lists	✓	✓	✓	
Allows integration with third-party vendors		✓	✓	✓
Includes Emergency Notification that is built-in to the tool	✓		✓	
Can send messages to individual contacts, groups of contacts, or teams from recovery plans	✓	✓	✓	✓
Can record custom voice messages instead of text to speech	✓		✓	
Can send polls and surveys and then view summarized results	✓	✓		✓
Includes pricing model overview	✓	✓	✓	
Click below to learn more about <b>Emergency/Mass Notification</b>				
 Catalyst  FairchildApp  RPX  Sustainable Planner				
<b>CATEGORY 8 Exercises</b>				
Able to customize exercise templates	✓	✓	✓	✓
Includes exercise planning - type, objective, scope, participants	✓	✓	✓	✓
Documents results	✓	✓	✓	✓
Documents and assigns action items	✓	✓	✓	✓
Click below to learn more about <b>Exercises</b>				
 Catalyst  FairchildApp  RPX  Sustainable Planner				
<b>CATEGORY 9 Reporting &amp; Approvals</b>				
Includes multiple formats for output	✓	✓	✓	✓
Able to generate reports quickly	✓	✓	✓	✓
Includes preformatted reports	✓	✓	✓	✓
Allows custom reports to be built	✓	✓	✓	✓
Includes data collection reporting	✓	✓	✓	✓
Allows GIS and Latitude/Longitude mapping	✓	✓	✓	✓
Provides numerous types of charts and graphs	✓	✓	✓	✓
Allows multiple document types to be incorporated in reports	✓	✓	✓	✓
Organize attachments to appear in appropriate section of reports	✓	✓	✓	✓



REPORTING & APPROVALS CONTINUED	CATALYST by Avalution Consulting	FAIRCHILDAPP by Fairchild Consulting	RPX by RecoveryPlanner	SUSTAINABLE by Virtual Corporation
Provides automated update and approval reminder process (policy, bias, plans)	✓	✓	✓	✓
Provides automatic program metrics based off of the data entered into the system	✓	✓	✓	✓
Provides automatic gap analysis	✓	✓	✓	✓
Able to visually map directional relationships and dependencies across the organization	✓	✓	✓	✓

Click below to learn more about **Reporting & Approvals**

 Catalyst
  FairchildApp
  RPX
  Sustainable Planner

### CATEGORY 10 Ease of Use

Includes user friendly interface	✓	✓	✓	✓
Includes filters & search	✓	✓	✓	✓
Allows personal filters	✓	✓	✓	✓
Includes drag & drop feature	✓	✓	✓	✓
Includes single page user guide for simplified user experience	✓	✓	✓	✓
Provides customized dashboard (user-specific)	✓	✓	✓	✓
Provides help text throughout the tool to explain what data is being requested	✓	✓	✓	✓
Includes fully integrated data (data entered in one part of the system is available through the tool – reduced duplication and contradictory data)	✓	✓	✓	✓

Click below to learn more about **Ease of Use**

 Catalyst
  FairchildApp
  RPX
  Sustainable Planner

### CATEGORY 11 Flexibility & Scalability

Scales to fit the user (different packages are available)	✓	✓	✓	✓
Able to change or add terminology	✓	✓	✓	✓
Allows screen customization	✓	✓	✓	✓
Able to edit folder or tag structure	✓	✓	✓	✓
Able to change/delete fields, questions, pages	✓	✓	✓	✓
Able to "clone" templates with or without prepopulated data	✓	✓	✓	✓
Able to add numerous question types	✓	✓	✓	✓
Able to add custom fields	✓	✓	✓	✓

CONTINUED ON NEXT PAGE

**CATALYST**  
by Avalution Consulting

**FAIRCHILDAPP**  
by Fairchild Consulting

**RPX**  
by RecoveryPlanner

**SUSTAINABLE**  
by Virtual Corporation

Able to customize default fields



Able to re-order or hide fields



Able to customize help text

Click below to learn more about **Flexibiity & Scalability**

Catalyst
 FairchildApp
 RPX
 Sustainable Planner

## CATEGORY 12 Education & Training

Offers on-site training at customer's location



Provides user group meetings



Provides online training



Provides help center



Provides help text throughout tool



Allows Admins to customize the help text throughout tool



Training needed for end users is less than 1 hour



Training needed for end users is 1 - 4 hours



Training needed for end users is more than 8 hours



Training for administrators is less than 8 hours



Training for administrators is 16 - 24 hours



Training for administrators is more than 24 hours



Is there a fee for standard training?

Click below to learn more about **Education & Training**

Catalyst
 FairchildApp
 RPX
 Sustainable Planner

## CATEGORY 13 Availability

Includes 99.9 uptime guarantee



Provides redundant system architecture of hosted data centers



Allows daily backup of data

Click below to learn more about **Availability**

Catalyst
 FairchildApp
 RPX
 Sustainable Planner

## CATEGORY 14 Other

Offers a free trial

Click below to learn more about **Other Features**

Catalyst
 FairchildApp
 RPX
 Sustainable Planner

