Business Continuity Plan Template for Dealerships

A fill-in plan for keeping sales, F&I, service and parts open when the DMS, the internet, the phones or the power go out.

> **How to use it.** Fill in one copy per store, or one for the group with every rooftop listed. Do it at one sitting with your general manager, your controller and whoever runs IT, then print it and keep a copy away from the building. Test it once a year. **The targets in section 3 are yours to set, so write them down before anyone needs them.**

Store or group _____ Version date _____

1 The plan and who owns it

1.1 The stores and buildings this plan covers, with each address.

1.2 The plan owner, and a backup owner who can act when the owner is away.

1.3 Who can declare an outage and move a store to its fallback, without waiting for anyone else.

1.4 Where the printed copies are kept, including one copy away from the building.

2 The contact tree

2.1 Each department manager's cell number, and the one person each of them calls first.

2.2 Your IT provider, DMS provider, internet carrier and phone provider, each with its account or circuit number.

2.3 Your lenders, your manufacturer's dealer support line, your insurer and your bank.

2.4 How you'll reach staff and customers if email and the desk phones are both down.

Who	Name or company	Phone	Account or circuit number
IT provider			
DMS provider			
Internet carrier			
Second internet carrier			
Phone provider			
Manufacturer dealer support			
Insurer			
Bank			
Lender			

3 Recovery priorities and targets

3.1 The order your systems come back in, written as a ranked list.

3.2 For each system, the longest the store can run on its fallback before it costs real business.

3.3 For each system, how many hours of entries you could afford to lose or key in again.

3.4 Who signed off on these targets, and the date.

System	3.1 Order	3.2 Longest on the fallback	3.3 Hours of entries you could lose
DMS			
Internet connection			
Phones			
Email and Microsoft 365			
CRM			
Lender and credit portals			
Manufacturer parts and warranty sites			
Card terminals			
File shares and scanned deal jackets			

4 Internet, firewall and power

4.1 Your main internet carrier at each store, with the circuit ID and the support number.

4.2 A second connection from a different company over a different path, including a non-wired option such as satellite or cellular.

4.3 A second firewall, or a spare on the shelf, and the person who swaps it in.

4.4 Which systems the second connection carries: the DMS, phones, card terminals and manufacturer tools.

4.5 Battery backup for the network closet, how long it lasts, and whether a generator covers the building.

5 Data, backups and retention

5.1 Every place store data lives: on-site servers, the DMS, Microsoft 365 and other cloud apps.

5.2 How each one is backed up, including cloud-to-cloud backup for Microsoft 365 and your other cloud systems.

5.3 Older systems still on a server in the building, and the plan to move them to the cloud and back them up there.

5.4 How long each vendor keeps your data, and how it's disposed of when you leave.

5.5 The date of the last test restore, and how long it took.

6 Department fallbacks

6.1 Sales: who can approve a deal on paper, and where the paper deal packs are kept.

6.2 F&I: which lender portals still work without the DMS, and the paper contracts on hand.

6.3 Service: paper repair orders, tomorrow's appointment list and how technician hours get recorded.

6.4 Parts: a recent price and bin list, numbered counter tickets and who can still order from the manufacturer.

6.5 Accounting and the office: how payroll runs, and how the paper gets entered once systems are back.

7 Phones and customers

7.1 Where the main number and each department line forward when the desk phones are down.

7.2 A short script for staff: what customers hear, and when someone will call them back.

7.3 Who updates the website, the Google listing and social pages if a store closes for the day.

8 If a store can't open

8.1 Where each department works if a building can't open, such as a sister store or a temporary space.

8.2 How quickly you want to stand up another location or restore its data, written as your own target.

8.3 What moves with the staff: laptops, deal jackets, forms and parts already promised to customers.

9 The yearly test

9.1 The date of this year's test, and who runs it.

9.2 The outage you'll walk through, picked from the table below.

9.3 What didn't work, who's fixing it, and by when.

One plan, seven kinds of outage

What goes down	What the plan has ready	Where it is
The DMS	The person in 1.3 moves the store to paper, and each department opens the fallback it wrote down in advance.	Sections 1, 3 and 6
The internet line	The second connection picks up the DMS, the phones and the card terminals, as long as it was set up to carry them.	Section 4, items 4.2 and 4.4
The firewall	A second firewall or a spare on the shelf, and a named person who knows how to swap it in.	Section 4, item 4.3
Power, or a storm	Battery backup buys time in the network closet. Paper and the contact tree carry the rest of the day.	Sections 2, 4 and 6
The phones	Lines forward to the numbers in 7.1, and everyone answering uses the same short script.	Section 7
A key vendor	The support line and account number are already printed, and the departments know their fallback.	Sections 2 and 6
A whole store	Staff move to the place named in 8.1, and the data they need can be reached from there.	Sections 5 and 8

A cyberattack can cause any row in this table. When it does, run your incident response plan alongside this one: heliontechnologies.com/incident-response-plan-template/

Finished the plan?
Bring it to a complimentary IT and cybersecurity assessment, and we'll review your current setup and put the findings in writing. **heliontechnologies.com/it-assessment/**

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