

# Document Disaster Readiness Checklist

*Is Your Document Infrastructure Truly Prepared?*



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# The Thing **Most Companies Overlook.**

Most companies plan for disasters.

They have evacuation procedures. Backup generators. Insurance policies. IT recovery plans.

But there's one area that often gets overlooked:

## **The documents.**

Contracts. Invoices. Payroll records. Insurance policies. Permits. Compliance documentation.

These aren't just files. They are the records that allow a business to prove, operate, recover, and rebuild.

When a flood, fire, cyberattack, or severe weather event hits, those documents become one of two things:

## **A strategic asset...or a serious liability.**

Over the years, I've seen both sides.

Some companies recover quickly because their documents are accessible, organized, and protected.

Others spend weeks - or months - trying to piece together what they've lost because records were destroyed, inaccessible, or scattered across systems.

This checklist is designed to give you a clear, honest assessment of where you stand.

It takes about 10 minutes.

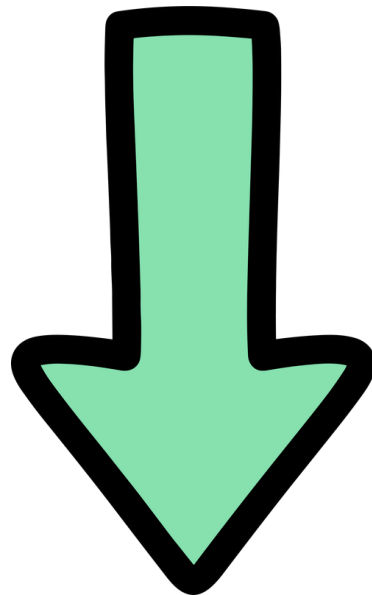
What you uncover now is far easier to address than what you discover in the middle of a crisis.

## How to Use This Checklist

Work through the five sections below. Check each item that applies to your organization.

Your total score (out of 22) will help you understand:

- Where you're well-positioned
- Where gaps exist
- Where to focus first





## 1 Do You Know What's Critical?

In a disaster, everything can't be recovered at once.

You need clarity on what matters most - and what can wait.

### Check each box that applies:

- We maintain a defined list of critical document types (contracts, payroll, insurance, permits, etc.)

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- Documents are prioritized by recovery urgency

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- We know exactly where each critical document resides (physical and digital)

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- More than one person knows how to access critical documents

Score: \_\_\_ / 4

**If fewer than 3 apply:** You may struggle to prioritize recovery effectively. Start by identifying your top 10 critical document types and where they are stored.



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## Are Your Documents Properly Backed Up?

A server in one building. Paper files in one office. A backup drive sitting next to the server.

These are all single points of failure.

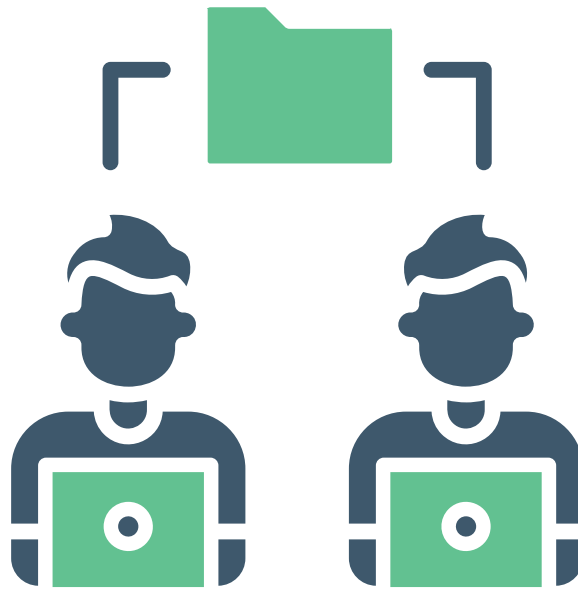
**Check each box that applies:**

- Critical documents exist in at least two separate physical locations
- Digital backups are stored in a different geographic region
- Backup restoration has been tested within the past 12 months
- Paper-only documents have been digitized
- Backups occur automatically

Score: \_\_\_ / 5

**If fewer than 3 apply:**

You are exposed to a single event taking out your only copy.



### 3 Can You Access Documents Remotely?

If your office is inaccessible, can your business still function?

**Check each box that applies:**

- Critical documents are accessible from any location with internet access

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- Key personnel can access documents from non-company devices if necessary

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- Access permissions are documented and up to date

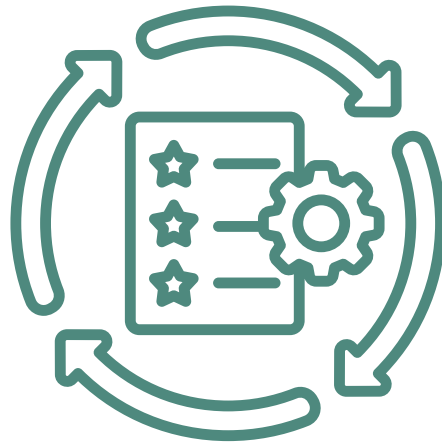
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- Access does not depend on a single individual

**Score:** \_\_\_ / 4

**If fewer than 3 apply:**

Operations may stall simply because documents cannot be reached.



## 4 Can You Actually Operate?

Access alone isn't enough.

You need to be able to execute - pay people, serve customers, meet obligations.

**Check each box that applies:**

- Payroll could be processed within 48 hours

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- Insurance claims could be filed within 72 hours

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- Critical vendors could continue to be paid

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- Customer communication could continue without interruption

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- Regulatory documentation could be produced if required

**Score: \_\_\_ / 5**

**If fewer than 3 apply:**

Your ability to operate during recovery is at risk—not just your ability to access files.



## 5 Do Your People Know What to Do?

In a crisis, clarity matters.

Technology alone won't carry the organization.

**Check each box that applies:**

- Designated individuals understand document recovery responsibilities

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- More than one person can access and retrieve critical documents

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- Key contact information is accessible outside the primary office

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- Disaster recovery drills have been conducted in the past 24 months

**Score:** \_\_\_ / 4

**If fewer than 2 apply:**

You are relying on people to figure things out under pressure - and that rarely goes well.

# Your Total Score

Section	Your Score
1. Critical Documents	___ / 4
2. Backup & Redundancy	___ / 5
3. Remote Access	___ / 4
4. Recovery Operations	___ / 5
5. People & Process	___ / 4
<b>TOTAL</b>	<b>____ / 22</b>

## What Your Score Means:

### 18-22: Strong position.

Your document infrastructure is resilient. Continue to review annually and after major changes.

### 12-17: Moderate gaps.

You have a foundation, but meaningful vulnerabilities remain. Focus on your weakest areas.

### 6-11: Significant risk.

A serious event would likely disrupt operations for an extended period. Backup and access should be immediate priorities.

### 0-5: Critical vulnerability.

Your document infrastructure represents a major operational risk. This should be addressed with urgency.

## Quick Wins: What You Can Do This Week

You don't need a full overhaul to make progress.

Start here:

- 1 Identify your top 10 critical document types and where they are stored.
- 2 Pinpoint single points of failure (paper-only, single-location storage, untested backups).
- 3 Test your backup - restore an actual document.
- 4 Verify remote access - try accessing key documents from outside the office.
- 5 Ensure at least one additional person can access your document systems.

## What Experience Teaches

Disasters are unpredictable.

Preparation is not.

The companies that recover quickly aren't necessarily the largest or the most sophisticated.

They're the ones that took the time to understand where they were vulnerable - and addressed it

## Final Thought

Most organizations don't realize how exposed they are until they're forced to find out.

By then, options are limited.

The better question is:

If something happened tomorrow, would your documents help you recover - or hold you back?

That answer is worth knowing.

## Invitation

If this raises questions - or confirms concerns - it may be worth a conversation.

After years working alongside founders as a CPA, and building MaxRecall into an AI-enabled document management platform serving wholesale distribution, one thing is clear:

**Document readiness isn't about technology alone. It's about understanding how your business actually operates under pressure.**

A focused 30-minute discussion can help you:

- Identify hidden risks
- Evaluate your current level of readiness
- Prioritize practical next steps

No pitch. No pressure.

Just a straightforward, experience-driven look at where you stand today - and what matters most going forward.

**Schedule a Call**

[maxrecall.com/schedule-a-demo](https://maxrecall.com/schedule-a-demo)