

# **Business Continuity Plan**

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## Introduction

This MetriFi Business Continuity Plan outlines how we will respond to events that significantly disrupt our business. However, since the timing and impact of disasters and disruptions is unpredictable, we will have to be flexible in responding to actual events as they occur.

### **Our Business Continuity Plan**

We plan to respond to a Significant Business Disruption (SBD) by safeguarding employees' lives and company property, quickly recovering and resuming operations, protecting all of the company's books and records, and enabling our customers to continue to operate. In short, our business continuity plan is designed to permit our company to resume operations as quickly as possible, given the scope and severity of the significant business disruption.

### **Varying Disruptions**

Significant business disruptions can vary in scope, such as only our company, a single location where our company conducts business, the business district where a worker of our company is located, the city where we are located, or a whole region. Within each of these areas, the severity of the disruption can also vary from minimal to severe. In a disruption to only our company or a location where our company conducts business, we will transfer our operations to a local site when needed and expect to recover and resume business within 72 hours. In a disruption affecting our business district, city, or region, we will transfer our operations to a site outside of the affected area, and recover and resume business within 7 days. In either situation, we plan to continue in business and will notify you by phone, email, or through MetriFi.com with details about how to contact us. If the significant business disruption is so severe that it prevents us from remaining in business, we will do what we can to facilitate our clients' transition away from MetriFi.

For more information about our business continuity planning, you can contact us at [support.metrifi.com](https://support.metrifi.com).

## I. Emergency Contact

In the event of a website emergency, report it to MetriFi by submitting a support ticket at [support.metrifi.com](https://support.metrifi.com) and classifying the ticket as an emergency.

## II. Business Continuity Plan (BCP) Policy

MetriFi's policy is to respond to a Significant Business Disruption (SBD) by safeguarding employees' lives and company property, quickly recovering and resuming operations, protecting all of the company's books and records, and enabling our customers to continue to operate. In the event we determine we are unable to continue our business, we will ensure that our clients can continue their business in our absence.

### A. Significant Business Disruptions (SBDs)

Our plan anticipates two kinds of SBDs, internal and external. Internal SBDs affect only our company's ability to communicate and do business (Example: If MetriFi's email service became unavailable). External SBDs may prevent the operation of an entire market or segment thereof (Examples: A terrorist attack, city flood, or wide-scale disruption). Our response to an external SBD relies more heavily on other organizations and systems, such as hosting companies used by MetriFi and our clients.

## **B. Plan Location and Access**

MetriFi will maintain an electronic copy of its BCP plan on MetriFi.com and our company's Google Drive account.

## **III. Business Description**

MetriFi provides website solutions for financial institutions. Our products and services include A/B testing, website design and development, technical support, and agentic web solutions. We are not a hosting company and do not own any servers.

### **A. Mailing Address**

138 E 12300 S, Unit 634  
Draper Utah 84020  
United States

#### ***Decentralized Team***

MetriFi operates on a decentralized model. Therefore, our company's mission critical activities and systems are not dependent on any physical location. Accordingly, in the event of an SBD, our team can carry on business activities from any location where they have access to a computer and the Internet.

## **IV. Hosting of Clients' Websites**

MetriFi is not a hosting company and does not own or operate any servers. Although we regularly assist our clients with hosting administration activities (e.g., launching websites and setting up SSL certificates), our clients are primarily responsible for the hosting of their own websites. Accordingly,

MetriFi assumes only limited responsibilities for website hosting as explained in our [Security Policy](#) (for example, we are not responsible for website uptime as it pertains to hosting). Therefore, in the event of an SBD, MetriFi will assist its clients as much as possible, but responsibility for hosting ultimately and primarily falls upon our clients and their chosen hosting companies.

## A. Website Back-Ups and Restorations

Consistent with our explanation above (IV), we are happy to help our clients restore their websites from backup points, but we are not primarily responsible for this task.

Where we have a WP Umbrella account in operation for a client, it attempts to backup the website daily. However, some server configurations can disrupt WP Umbrella's ability to backup a website. Therefore, we recommend you set up automatic daily backups with your hosting provider because backup points are indispensable in disaster recovery situations.

If website backups are available through WP Umbrella, we can restore the website using one of those backups without involvement from the hosting provider. On the other hand, if a client wants our help restoring a backup stored on a hosting account, then we need admin access to your hosting account.

## V. Backups for Systems, Services, and Data

MetriFi operates primarily using cloud-based systems, services, and records. In the table below is a list of systems and services used by MetriFi and backups for each in the event of an SBD.

Name	Description	Backup
Google Workspace	Gmail, Drive and Docs, Calendar. Important information, data, and records are stored in our company's Google Drive account.	Data is continuously replicated across geographically distributed data centers, with regular internal backups managed by Google.
Monday	Project management software. All of our project timelines and many records reside in Wrike.	Data is stored in monday.com's cloud infrastructure with continuous replication and daily automated backups maintained by Monday.
Mountain America Credit Union	Bank accounts and services	Our banking records are synced with QuickBooks.
QuickBooks	Finance and accounting software	Banking records originate from MACU. Records of some paid invoices are backed up physically at our headquarters.
Zendesk Docs	Business process documentation	Content and support data are stored in Zendesk's cloud infrastructure with continuous replication and regular automated backups managed by Zendesk.
Pipedrive	Customer relationship management	CRM data is stored in Pipedrive's cloud infrastructure with continuous replication and regular automated backups managed by Pipedrive.

<p>WP Umbrella</p>	<p>Website management. WP Umbrella is itself a backup system that we use as a second backup (in addition to backup services they should have through their hosting providers) for all of our clients' websites.</p>	<p>Data in WP Umbrella originates from our clients' websites.</p>
<p>Slack</p>	<p>Internal live messaging</p>	<p>Alternatives for Slack include communicating by email, text message, phone, WhatsApp, Zoom, and Google Hangouts.</p>
<p>Zoom</p>	<p>Video call software. Zoom is our primary method of live communications with clients.</p>	<p>Alternatives for Zoom include communicating by Google Hangouts, email, text message, phone, WhatsApp, and Slack.</p>
<p>Bitbucket by Atlassian</p>	<p>Repository for source code</p>	<p>Source code for our clients' websites are backed up on development and production sites, locally on our developers' individual computers, and in WP Umbrella.</p>

## VI. Website Continuity Procedures

In the event of a website mishap or disaster, we immediately *restore, inform,* and *resolve*.

### **Restore**

Restore the most recent, uncompromised version of the website (redundant, offsite backups are made at least every 24 hours with the hosting solutions we recommend and in MetriFi's WP Umbrella account).

### **Inform**

As needed, promptly inform our client of any issues by phone or email.

### **Resolve**

Resolve all issues and vulnerabilities that fall under the responsibility of MetriFi, and communicate with our client about any issues that need to be resolved by them.

## VII. Updates to BCP

As needed, MetriFi updates this plan whenever we have a material change to our operations, structure, business, or locations.