

Goodbye Data, Goodbye Business



As a broker your whole business revolves around data – clients, referrers, commissions and masses of documentation. And these days the vast majority of this is probably electronic, stored 'somewhere' on a computer.

But can you imagine coming into the office one morning, switching on your computer and ... NOTHING! All your clients gone. All your loans gone. All your commissions gone.

So, just how safe is your data and what impact could a hardware failure, fire or computer theft have on your business? Some very simple processes can make the difference between a minor crisis and a major catastrophe. Apart from disruption to business, losing your data could also mean you have lost a great saleable asset that we mentioned in a recent article – your CRM.

"Ah, but I've got a backup," you say. But have you? One lady I knew from Cairns would backup faithfully every day and simply wouldn't believe me when I told her that her backup disk was – well, how could I put it tactfully – BLANK!

Here are some tips to help you avoid disaster:

- **Know where your data is.** Do you know exactly which files contain your data? For example, where is your Outlook file, or your accounting file, or your CRM file?
- **Take responsibility for your data.** Too many brokers leave it to someone else, while they get on with the lending. But if you've left it with a technician what happens if he leaves, dies, falls out with you? If you leave it with an aggregator, what happens if you fall out with them? Having critical files on your own system, under your control, is the sensible option ... and make sure you also have access to the program to open them!

- **Use a layered approach to backup.**

Don't just rely on one method of backup – you can be sure Murphy will strike from time-to-time. Have a 'belt and braces' approach, such as the following:

- Normal **internal backup** such as across the network to another machine or (much better) to a CD or DVD. Make sure you have multiple generations and take them off the premises – they'll melt, even in a fire-proof safe. Memory sticks are not suitable for permanent storage. Ideally, keep at least an end-of-month CD and store for seven years, making sure it contains your accounting and other compliance documents.
- Have an **external drive** on your server or main machines. These are ideal for taking full images of entire machines and, if there's an emergency, you can grab the drive and go.
- Use an **off-site backup service**. Even BigPond offers this now, but most of the Australian services are rather expensive. Take a look at www.carbonite.com and www.idrive.com – at Linx Software we've recently reviewed both, so contact us for the results of our comparison tests.

- **Run a fire drill.** Test your backup from time to time by attempting to restore some data. A backup is only worth having if it actually works!

If you find any of the above daunting, then get some expert help. Just make sure they explain everything properly and don't be afraid to ask questions. **FB**

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