Don't Let a Disaster Be Your First Backup Test

How testing backup and disaster recovery plans can increase client confidence, trust, and loyalty

By Casey Morgan

It's no secret that IT providers and IT admins aren't testing backups. We know this because we spend a lot of time at tradeshows full of managed service providers, value-added resellers, and IT admins. When we present to them we often ask: "How many of you are testing your backups?" Typically, there's a pause before a few hands rise, but the vast majority leave them down.

So why aren't they testing? We've heard a few reasons. Typically, it's just that they're busy. Some say their clients don't want to test things properly because they don't want to show up after hours or on weekends. Plus, many business owners would rather just assume their IT provider has things handled than worry about it. But for an IT provider to actually *have* things handled, testing is crucial.

Why is Testing Important?

The importance of testing should go without saying, but sometimes it's useful to have a refresher on a few of the big reasons.

You can be sure backups work

The last place you want to test a backup is when you're trying to recover. Any program can run into issues—even the best backup software. While every backup might seem to go off without a hitch, there's no way to be certain without testing.

Your RTOs count on it

If you're familiar with recovery time objectives (RTOs), you know that it's the amount of time a system can be down before a business starts losing more money than it can tolerate. Setting an RTO is one thing, but it's quite

another to achieve an RTO. Admittedly, testing a full recovery of a server might be out of reach for some, but if you really want an idea of how long it takes to recover a particular system, you can only find out for sure by trying out a recovery.

You'll be more familiar with the process

Restorations take a certain amount of time—it's a hardware and software process—but the human touch is also a factor in a swift recovery. If you're in a crunch trying to recover a system, you need to be familiar with the procedure so it takes as little time as possible. This applies to full system restorations, file and folder recoveries, or cloud recoveries. And once you know the ropes you can implement strategies that increase your speed and help you reduce downtime even further.

You'll build trust with clients

Many businesses still don't understand that when you're talking about backup, you're not talking about some slow-to-backup, slow-to-recover system like tape. Those days are (thankfully) behind us. In order to manage expectations, clients need to be clear on the fact that you're not offering backups, you're offering disaster recovery, which involves quick recovery following failure and the reduction of costs associated with downtime.

Sadly, some clients will still expect cheap backup prices, even though a proper recovery solution isn't always the least expensive. That's why you need to show them what they're paying for and part of how you do this is by testing.

Once they've seen what the solutions can do (some providers send weekly emails that show backups went off as planned—even monthly or quarterly confirmations work fine), they'll see what they're paying for and they'll have faith in you as a provider. You'll show them that when something goes wrong, you have their data saved and you'll get them on track quickly.

You can test changes

We talked a lot about testing backups, but don't forget that you can use a backup that's spun up as a virtual machine to test changes on a system without the risk of making a mistake that causes a production machine to function improperly.

Your reputation is at stake

If you find yourself in recovery scenario and can't make it happen because of a failed or untested backup, you'll have some furious clients, which is to be expected when data loss can so easily crush a company. Testing helps you make sure this doesn't happen so you can save the day for your clients' and maintain a solid reputation.

What's The Right Type of Test?

Testing can be done in a number of ways, and they all have merits. The right test will likely be some balance between what you or clients see as necessary and what you both have time for. Just remember that seeing is believing, and the more you can test, the more your clients can see.

As for testing methods, these are some ways you can test your backups so you and your clients know recovery isn't just a nice thought—it's a guarantee.

Automatic verification

Many backup and disaster recovery software solutions automatically verify the integrity of your backup files. Since verification often happens automatically, you'll be able to have a level of assurance that backups work without much effort. Still, automatic verifications can't give you the level of assurance that hands-on testing can.

File and folder

One of the most basic hands-on tests is a file and folder recovery. If you can mount a backup image as a drive letter, browse through it, and recover a document, you'll know the data is readable and accessible. This is simple enough that you can show your clients how to do it themselves. Check out our tech tip to see how easy it can be with StorageCraft® ShadowProtect®.

Virtualization

Some backup solutions (such as StorageCraft ShadowProtect) allow you to spin up a backup image as a virtual machine. This way, you can see that the backup image can actually boot up and function. Some of our partners use backup and disaster recovery (BDR) devices that will take the place of failed hardware if there's a problem. These typically leverage virtualization technologies and should definitely be tested for functionality. Note also that sandboxing, or isolating a test machine from the production environment, is the best way to test a VM of a backup.

We have a video tutorial that shows you how to use StorageCraft VirtualBoot™ technology to spin up a virtual machine.

Bare metal recovery

As noted, a full restore to replacement equipment isn't something everybody has the resources to do, though some IT providers may have extra hardware around just to test things. If that's the case, testing a full restore is likely an option. As noted, it takes hardware time to move data to and from point A and point B, so to know how long this type of restore will take (which can affect your RTO), you need to test. Check out this tech tip to see how it works.

Cloud recovery

Not all clouds are designed for recovery. If you're using one that is, such as StorageCraft Cloud Services™, you'll likely have the option to virtualize a backup in the cloud and run it while you get things back on track. How long does this take and how do we know if it works for sure? Test it and find out!

Plus, when you're talking about running a system from the cloud, you need to be sure all of the settings are correct so that failover is smooth and as seamless as possible. Everything might seem to be in order, but you can't know until you try it. Here's a brief video on how easy it is to test a cloud recovery using StorageCraft Cloud Services.

Full disaster recovery plan

As we noted in a recent ebook Making Disaster Recovery Easy, a real disaster recovery plan isn't just having backups. It's a comprehensive plan that covers everything from personnel to utility redundancies, network and hardware requirements, and more. The idea is that nothing that can happen that will prevent a business from doing business. Testing one of these plans will take time for an IT provider and for a company, but to be ready they need to be tested.

How Often Should I be Testing?

The quick answer is test as often as possible. But testing too frequently can cost you time, which in turn, costs you money. Testing a full restore or a full disaster recovery plan isn't something you likely have time to do all that often, and you may not have the resources to send a truck out to a client site each week just to see if you can run onsite backups as VMs.

So instead, think about how essential data is on individual pieces of equipment. If data is more essential, you'll want added assurance that the backups can be recovered. If it's less essentially, maybe you don't test as often or instead rely on simpler testing methods.

But ultimately, it's best to plan things on a quarterly basis. Backup verification is done automatically with some backup solutions and can help validate the integrity of a backup image file, but as we noted, hands on testing will give you better insight. If you can, perform a file and folder recovery on a weekly basis and test a VM of a backup on at least a quarterly basis. If at all possible, consider testing a full restore as you test a disaster recovery plan on an annual basis so that executives and employees at a company know what to expect if something major goes wrong.

Should I Bill for Testing?

Remember that testing is a valuable service for your clients that involves your time and effort. As such, it's something you'll want to be compensated for. Note, however, that the MSP model is great because clients typically pay you one monthly fee for everything. You probably won't send clients a bill after a test, but rather, testing will just be a part of your regular service agreement. This is good for two reasons.

The first is that they never have to see "testing" as a separate bill. They won't feel like it costs them extra to pay for something that should be included.

Second is that they'll know that it's part of your service and is therefore, part of what they're paying for. This is useful because if they know it's something you include,

they'll want to take advantage of the added value. You want clients to be willing to take time to test so that you can be sure of their ability to recover and so they can continue to build trust with you.

But even though testing is essential and something you include in your service, some clients might be reluctant to take time to test, which leads us to the next part.

What if Clients Don't Want to Test?

Having clients who don't want to test can be frustrating, but you can reason with them. Here are a few things you can make them aware of so they see that testing is not something they can do without.

Testing is essential. Without a test, a backup is essentially useless. You'll only know it works when you try it.

Testing isn't always time consuming. Not all tests are the same. Some tests won't require much time or effort on their part. However, be conscious of the fact that testing a full disaster recovery plan can take time.

Testing is something they pay for. Your services should include testing if they don't already. If it's a part of what your clients are paying for, they'll be more likely to take advantage.

Testing gives peace of mind. Having backups and seeing backups restore are two different things. Knowing they will work will give clients added confidence in their ability to get up and running if something happens.

What Now?

If you haven't been testing, make it a priority to go through each client and test their backups. It's easy to put this off or to try and remember to do it next time you're onsite for maintenance, but just remember that failure can happen at any time and you don't want your recovery to be your test. Testing is just as essential as the backup itself.

If you've been testing sporadically, ask yourself: when is the last time I tested each clients' backups? Have all my clients' backups been tested? Make sure you know when which client has lasted tested (and how you performed a test) and when they're due for the next test. This lets you be on top of testing across the board.

If you don't have backup and disaster recovery plans for your clients, ask about our guide Making Disaster Recovery Easy to learn all you need to know about creating thorough and detailed documentation for your DR plan.

About the Author

Casey Morgan is the marketing content specialist at StorageCraft, a U of U graduate, and an Oxford comma enthusiast. Casey has spent the last few years writing hundreds of pieces of marketing content—from infographics to ebooks, blog articles, and web copy. He believes that content isn't just about selling products, it's about connecting and empowering people and businesses. When he's weary of words, you might find him and his dog in the woods or enjoying a cool homebrew.

StorageCraft Technology Corporation
11850 S. Election Road, Suite 100
Draper, UT 84020

www.StorageCraft.com
1.801.545.4700
contactus@storagecraft.com