

## Plan Merging Examples

Below is a list of common scenarios that would benefit from plan merging:

- **Escalation** – Imagine that you have an initial activation plan and separate plans for each escalation level. Once the initial activation occurs, all initial activity is activated. As you escalate, you activate the details associated with the escalation stage. All of this is managed in a single event. It also makes it easier to manage individual procedures for the initial activation along with each escalation stage. You do not have to maintain huge plans with every possible scenario or procedure.
- **Notification Template** – Some clients want to maintain the same notification procedures for their organization units but do not want to have multiple copies of the plan. In this case, we recommend that you create the main notification plan, which could contain the notification template. Within the notification, you select a group called Notification Recipients as part of the recipient list. Within the main notification plan, the Notification Recipients group will be blank. Next, you create a plan that has two elements: 1) the flow contains a linked plan to the main notification plan set to merge behavior and 2) a group called notification recipients. You then copy this plan to all of the organization units where you wish to offer the template. Finally, all you need to do is share in the individuals or other groups into each organization unit's plan notification recipient folder.
- **Activating Sub Plans** – If your response planning is based on location or some logical grouping, you may alter your plans to activate sub units. For example, let's say that you have a building outage plan. Within that plan you have the steps required for the initial activation of a building outage. At some point within the workflow, you determine the need to activate the business continuity plans of each department within that building.
- **Reusable Procedures** – Our clients are using plans to create reusable procedures. Reusable procedures may be any activity that is used over and over again. Instead of duplicating the procedures in every plan, you can simply maintain in a single plan and link the plans with a merge behavior. A good example of this is compliance procedures. Most compliance procedures are the same for common types of events. Instead of duplicating these procedures in every plan, create a plan that contains only the compliance procedures, then link the plan and set the behavior to merge. Upon activation, the most up-to-date compliance procedures will be merged into the original event.