Recovery Test Planning Worksheet

Define a proposed recovery test and the business evidence needed before relying on its results.

How to use these four pages

1. Choose an activity and identify the recovery question.

2. Agree scope, dependencies and proposed business checks with the technical owner.

3. Complete page 3 and obtain the necessary test permissions separately.

4. Record actual results and follow-up only after an authorised test.

A practical working aid

Use the blank records for your own discussion. Examples are fictional, not client case studies. Print to complete by hand or adapt the prompts in your own document; this PDF is not a fillable form.

Keep completed records confidential. Use references to protected evidence rather than passwords, customer records or sensitive system details.

Online instructions and companion article

Read the guide

Read the article

Source guidance

NIST SP 1300: Small Business Quick-Start Guide

NIST SP 800-61 Rev. 3: Incident Response Recommendations

Public guidance checked 10 November 2026. The source material informs the approach; no endorsement is implied. This worksheet supports planning and record-keeping. It does not authorise testing, certify compliance or replace an agreed specialist review.

Free to use and adapt within your business with the GRCPreneur acknowledgement retained.

A fictional worked example

Illustrative entries only. No real client, vendor result or completed implementation is claimed.

Record	Illustrative entry
Business activity	Prepare invoices from an archived sample of records.
Proposed scope	Restore a defined archive to an isolated environment; no production overwrite.
Business checks	Selected records and expected attachments can be opened and reconciled.
Safety boundary	Technical owner defines permissions, stopping conditions and test-data removal.
Dependency	A separate attachment service is not covered by the initial sample.
Next decision	Owner reviews the technical proposal before authorising a test.

Before using the blank pages

Agree who will review the record and what decision it supports. Mark assumptions, proposed actions and unverified claims clearly. Copy pages 3 and 4 when you need more space.

Your working record

Project / record ID: _____ Date: _____

Activity and recovery objectives

Which work, target interruption and tolerable data-loss period? Mark assumptions.

Scope, data and dependencies

Which backup set, applications, accounts and sample are proposed?

Permissions and safety boundary

Who must authorise? Test environment, stopping conditions and handling arrangements.

Business success checks

Who checks usability, completeness and reconciliation? What evidence is expected?

Results and next decision

Leave results blank until tested. Record actual observations, limits and follow-up.

Use protected evidence references. Do not enter credentials or confidential customer details.

Recovery checks and follow-up

Related record / requirement: _____ Review date: _____

Check / dependency	Observed evidence / limit	Owner / due date	Decision / next test

Review before the next decision

- A planning discussion has not been treated as permission to execute.
- The technical owner has agreed safety and handling arrangements.
- Objectives are distinguished from observed results.
- Untested dependencies and follow-up actions remain visible.

Decision, authority and next checkpoint

Proceed / revise / defer / stop. State the decision scope, conditions, approver and date.

A completed record documents a review. Approval applies only to the stated scope and does not establish that untested work has succeeded.