CLOUDSWITCHED

FREE RESOURCE — DISASTER RECOVERY TESTING CHECKLIST

Disaster Recovery Testing Checklist

Tabletop exercises, component-level restores, and full failover simulations — the structured tests that prove your DR plan actually works before you need it. Tier the test, record the scenario, measure RTO and RPO against target, log pass/fail per system, and book the next test date before you leave the room.

4	Quarterly	RTO/RPO	Fillable
STRUCTURED TEST TYPES	MINIMUM TEST CADENCE	MEASURED PER TEST, PER SYSTEM	TICK & TYPE IN ANY VIEWER

TABLETOP · COMPONENT RESTORE · FULL FAILOVER · POST-TEST REVIEW

PREPARED FOR	PREPARED BY	VERSION	FORMAT
Cloudswitched Knowledge Library	Cloudswitched Ltd.	2026 Edition	Interactive PDF

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How to use this checklist

A DR plan that has never been executed end-to-end is a hope, not a plan. This checklist walks through the four structured tests every UK SME should run on its disaster recovery plan: a **tabletop exercise** with the people who would have to act, a **component-level restore** for each critical building block, a **full failover simulation** against your DR site, and a **post-test review** that turns findings into fixes. Each section captures the test plan, the actual measured RTO and RPO, a per-control tick, and a section score so you can show a board or an auditor that the plan was genuinely tested.

WHY DR TESTING IS CRITICAL

Roughly 70% of organisations that suffer a major incident without a tested DR plan never fully recover within two years. The most expensive failures are not the disasters themselves — they are DR plans that looked fine on paper, were never rehearsed, and quietly fell apart on the day. Testing is what converts the plan from a document into an operational capability.

The four test types

- **01 Tabletop exercise** — walk the plan through with the people who would run it. No systems touched, lowest risk, fastest cadence (quarterly minimum).
- **02 Component-level testing** — restore individual building blocks in isolation: backup, server image, application, database, network failover, DNS, M365.
- **03 Full failover simulation** — declare a simulated disaster, run the full DR runbook to the recovery site, measure RTO and RPO, then test failback.
- **04 Post-test review & reporting** — document outcomes within five business days, compare RTO/RPO to target, update the plan, schedule the next test.

How to score each section

- Tick each item only when it is genuinely complete — not when it is on the to-do list.
- Write the count of ticked items into the section score box, divided by the total questions in that section.
- Anything below 70% in a section means that test type is not yet credible. Record observations, gaps and improvement actions in the Section 04 notes box.

INFORM, DON'T SURPRISE

Always announce DR simulations to staff, customers and key suppliers in advance. Unannounced tests cause panic and interfere with real business activity — the point is to test the plan, not the people.

01

Tabletop exercise

Walk a realistic disaster scenario through with key stakeholders in a single room. No systems are touched — the test is whether the people, decisions and communication paths in the plan actually work when you read them out loud.

This test

Test date _____ **Facilitator** _____

Scenario chosen _____ **Participants present** _____

Checklist

- ☐ A **realistic, relevant scenario** has been chosen (ransomware, data centre fire, ISP failure, key-person absence, supplier outage).
- ☐ All **key stakeholders** are in the room: IT, senior management, finance, operations and communications.
- ☐ The current **DR plan document** is on the table and participants work through it step by step, not from memory.
- ☐ Each participant can articulate their **role and responsibilities** during a real disaster without prompting.
- ☐ **Communication procedures** have been walked through end to end: who contacts whom, using which method, in which order.
- ☐ **Decision points** have been tested: who authorises a failover, at what trigger, with what evidence.
- ☐ **Gaps, ambiguities and unrealistic assumptions** in the plan have been identified and documented as they were spotted.
- ☐ The **DR plan has been updated** based on findings within five business days of the tabletop.

SECTION 01 SCORE _____ / 8 *One tick per item — only count an item if it is genuinely complete.*

02

Component-level testing

Recover individual building blocks of the environment in isolation to prove each one works on its own — before you ever try a full failover. A failed component restore at this stage is much cheaper to fix than discovering the same problem mid-disaster.

This test

Test date _____ **Tester** _____

Test environment _____ **Scope this round** _____

Checklist

- ☐ **Backup restore test:** a recent backup has been restored to an isolated environment and data integrity verified against a known-good sample.
- ☐ **Server recovery:** a full server image has been restored to new hardware or a VM and confirmed to boot, log in, and run its primary service.
- ☐ **Application recovery:** a line-of-business application has been restored and verified to function end-to-end with test data.
- ☐ **Database recovery:** a database has been restored from backup and verified for integrity and application connectivity.
- ☐ **Network failover:** a simulated internet failure has been run and the backup circuit / SD-WAN secondary has activated within target.
- ☐ **DNS failover:** DNS changes have been verified to propagate inside the timeframe the DR plan assumes for cutover.
- ☐ **M365 data restore:** email, OneDrive files and SharePoint data have been restored from the third-party M365 backup solution.

SECTION 02 SCORE _____ **/ 7** *Tick only items proven by a real restore, not desk-checked.*

RESTORE TO AN ISOLATED ENVIRONMENT

Always restore into a sandbox VLAN or a separate subscription — never on top of live production. The point of the test is to prove the restore works, not to risk corrupting the only good copy of your data if something in the recovered image is misconfigured.

03

Full failover simulation

The hardest, highest-value test — declare a simulated disaster and execute the complete recovery runbook end to end, into the DR site or cloud recovery region. This is where you find out whether the RTO and RPO you committed to are real numbers or wishful thinking.

This test

Simulation date / window		**Disaster scenario**	
RTO target		**RTO actual (measured)**	
RPO target		**RPO actual (measured)**	

Checklist

- ☐ A **simulation date and window** has been agreed with all stakeholders, including customer-facing teams.
- ☐ The **scenario is realistic** — complete primary site unavailability, not a contrived best-case.
- ☐ **Failover is initiated** by following the documented DR procedure step by step — not ad-hoc by the most senior engineer in the room.
- ☐ All **critical (Tier 1) systems** have been recovered to the DR site or cloud environment and confirmed accessible to end users.
- ☐ **RTO is measured** — the time from disaster declaration to systems being available is recorded against target.
- ☐ **RPO is measured** — the actual data loss (time gap between last good backup and simulated failure) is recorded against target.
- ☐ Key users have **tested applications** in the DR environment and confirmed they can perform their core business tasks.
- ☐ **Failback is tested:** the return to the primary site is executed and verified, not just the failover leg.

SECTION 03 SCORE _____ **/ 8** *Anything below 7/8 is not yet a passable full failover.*

04

Post-test review & reporting

The value of a DR test is in what you do with the findings. Within five business days of any test, the team should close the loop: document outcomes, compare measured RTO/RPO to target, assign owners to remediation actions, and lock in the next test date before the room empties.

This review

Report author _____ **Report completed (date)** _____

Checklist

- ☐ A **post-test report** has been completed within five business days, documenting scope, scenario, outcomes and findings.
- ☐ **RTO and RPO achievements** have been compared to the targets documented in the DR plan — did we meet them?
- ☐ All **issues encountered** during the test have been documented with root cause, not just symptoms.
- ☐ **Improvement actions** have been assigned to named owners with deadlines and a follow-up review date.
- ☐ The **DR plan has been updated** to address gaps, missing steps, broken assumptions or stale contact details found during the test.
- ☐ Test results have been **shared with senior management** and any relevant compliance / audit / cyber-insurance stakeholders.
- ☐ The **next test date** has been scheduled and added to people's calendars before the post-test review meeting ends.

SECTION 04 SCORE _____ **/ 7**

A test you never wrote up is a test you never did.

Observations & lessons learned

05

Test schedule & sign-off

Use this rolling schedule to keep DR tests visible at board level. One row per test type per system — tick the pass/fail box for each system once the test is complete, record measured RTO and RPO, and book the next test date before the row is closed out.

Rolling test schedule

TEST TYPE	FREQUENCY	LAST TESTED	RTO ACTUAL	RPO ACTUAL	RESULT	NEXT TEST
Tabletop exercise	Quarterly		N/A	N/A	☐ Pass ☐ Fail	
Backup restore	Monthly				☐ Pass ☐ Fail	
Component recovery	Quarterly				☐ Pass ☐ Fail	
Full failover	Annually				☐ Pass ☐ Fail	
Failback test	Annually				☐ Pass ☐ Fail	

PREPARED BY

SIGN-OFF DATE

APPROVED BY

NEXT RETEST DATE

PLAN VERSION

REVIEWER

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