

PROJECT CONNECTIONS / PLANNING KIT 01

Coordinate the Response Before Making Assumptions.

Business Data Breach Response Coordination Workbook

Organize verified facts, decision authority and qualified advice when personal information may have been exposed.

PRINT-READY WORKBOOK / 14 PAGES

Illustrative supplied photo; not member project evidence.

FOUNDED 1994 / CAMDEN / GLOUCESTER / BURLINGTON

SOUTHJERSEYBUSINESSASSOCIATION.ORG

Start with qualified coordination

Engage technical incident-response specialists and counsel with privacy/data-security experience promptly. Preserve evidence under their direction and agree on trusted communications. Do not wait for a complete narrative before seeking help. [S1, S2]

Use trusted channels. Confirm who can authorize each response action.

YOUR STAGE / Engage / Establish facts / Coordinate / Review

Current stage / accountable business lead / next briefing time

Immediate coordination goal / evidence of progress / target date

Trusted contact method / technical and legal leads / alternate channel

USE THIS WORKBOOK

Gather facts and requirements / pages 3-6

Compare and coordinate / pages 7-10

Review readiness and act / pages 11-14

Do not use this workbook to decide on shutdown, deletion, isolation or notification. Do not put credentials, incident evidence, logs, personal records or notification lists in general AI tools.

Separate observations from unknowns

A suspicious alert is an observation, not proof of what was accessed. Preserve exact dates and time zones; keep sensitive details in the controlled incident record.

RECORD 01

Event / timestamp and time zone / reporter

Source reference / observed fact / verification status

Unknown / person verifying / next update due

RECORD 02

Event / timestamp and time zone / reporter

Source reference / observed fact / verification status

Unknown / person verifying / next update due

Use categories such as unverified, corroborated or contradicted. Record corrections without silently overwriting earlier entries.

Set decision authority and contacts

Identify primary and backup roles. Independently confirm contact details using a known channel before sharing sensitive information or accepting instructions.

Business decision lead

Confirm authority, spending limits, escalation and alternate decision-maker.

Owner: _____ Due: _____ Received by: _____

Technical response lead

Confirm investigation scope, preservation instructions and secure evidence handoff.

Owner: _____ Due: _____ Received by: _____

Legal / privacy counsel

Assess jurisdictions, contracts, reporting and communications questions.

Owner: _____ Due: _____ Received by: _____

Insurer / broker and external specialists

Ask about applicable notice terms, approved vendors and authorization requirements.

Owner: _____ Due: _____ Received by: _____

Store actual sensitive contact details in the restricted response directory. Personal identity monitoring is not enterprise incident response.

Inventory potential exposure categories

Use category-level descriptions only. Record suspected involvement separately from verified findings; avoid copying actual personal information into this worksheet. [S3]

Category / scope	Suspected / confirmed / unknown	Verifier / record reference
System / service / business owner		
Information category / retention location		
People or organizations potentially involved		
Third-party custodian / contract reference		
Evidence gaps / specialist determination		

Next question / responsible person / review date

An inventory does not establish that a breach occurred or that a specific law applies.

Track preservation requests

The qualified response team determines what to preserve and how. This log records instructions and acknowledgments; it is not a forensic collection procedure. [S1]

RECORD 01

Request ID / authorized requester / time zone

Requested action / assigned specialist / approval reference

Completion evidence reference / secure recipient / receipt time

RECORD 02

Request ID / authorized requester / time zone

Requested action / assigned specialist / approval reference

Completion evidence reference / secure recipient / receipt time

Do not alter, dispose of or send evidence based on this worksheet alone. Ask the response lead how to resolve conflicting instructions.

Coordinate technical actions

Track investigation, containment and remediation separately. A proposed action must not be confused with an authorized or completed one.

RECORD 01

Action / purpose / specialist proposing it

Status: proposed / approved / completed / deferred; authority / date

---

Dependency / impact on evidence or service / completion reference

---

RECORD 02

Action / purpose / specialist proposing it

Status: proposed / approved / completed / deferred; authority / date

---

Dependency / impact on evidence or service / completion reference

---

Record the person authorized to accept residual limitations. Completion of a task does not prove all systems are clean.

Ask counsel about actual obligations

Ask qualified counsel which jurisdictions, data types, roles and contractual terms apply. NJ official reporting resources are a starting point, not a complete obligations analysis. [S1, S2]

01 / Applicable laws / regulators / affected jurisdictions

Authority / professional / contact: _____

Source / checked date / actual deadline: _____

Applicable finding / evidence / conditions: _____

Unresolved question / owner / follow-up: _____

---

02 / Customer, processor, vendor and insurer contract duties

Authority / professional / contact: _____

Source / checked date / actual deadline: _____

Applicable finding / evidence / conditions: _____

Unresolved question / owner / follow-up: _____

---

03 / Confirmed notification decisions / timing / sequencing

Authority / professional / contact: _____

Source / checked date / actual deadline: _____

Applicable finding / evidence / conditions: _____

Unresolved question / owner / follow-up: _____

Record the actual source and trigger date confirmed by counsel. Do not insert a default notification deadline or assume one law controls.

Review every communication

Keep statements tied to confirmed facts. Separate legal notice, staff instructions, customer support and public updates; use the designated approval process.

RECORD 01

Audience / purpose / draft version / confirmed-fact references

Legal and factual reviewers / approval status / authorized sender

Trusted channel / approved timing / correction and revision record

RECORD 02

Audience / purpose / draft version / confirmed-fact references

Legal and factual reviewers / approval status / authorized sender

Trusted channel / approved timing / correction and revision record

This is an approval workflow, not a preapproved notice template. Record what remains unknown without speculation.

Keep service decisions accountable

Identify which services can operate under approved conditions. Coordinate workarounds with technical and legal leads before making customer commitments.

Service / need	Approved limits / evidence	Owner / next review
Affected service / dependency		
Approved temporary arrangement		
Customer-support channel / authorized script		
Staff access / third-party permission		
Review trigger / return-to-service criteria		

Next question / responsible person / review date

Record the approving role, limits and expiry of each workaround. Do not promise recovery or restored data.

Track response cash and records

Keep estimates, approved commitments and paid amounts distinct. Record the invoice or matter reference rather than confidential evidence.

Period / scenario: _____ Currency: _____

Cost / responsibility	Estimate	Confirmed	Source / cash due
Technical investigation / response			
Legal and specialist advice			
Continuity / customer support			
Communications / applicable notices			
Restoration / follow-up review			
Other approved response expense			

Total / one-time vs. recurring / decision owner / next review

Ask the insurer which records, timing and authorizations matter. Coverage and reimbursement remain unconfirmed until the responsible party determines them.

Review recovery and closure evidence

Ask each lead what was established, what remains uncertain and what ongoing monitoring or obligations continue. Closure is an accountable decision with limitations.

[ ] Technical findings and remaining risks documented

Evidence / accountable owner / date: _____

[ ] Counsel has assessed outstanding duties and records

Evidence / accountable owner / date: _____

[ ] Service owners have accepted approved operating limits

Evidence / accountable owner / date: _____

[ ] Future review, retention and escalation owners assigned

Evidence / accountable owner / date: _____

Go / no-go decision, reason and limits / decision owner / date

Fallback / next action / review trigger

Do not use this checklist as a security certification or assurance that information was recovered.

Conversations and accountable next steps

Use a restricted briefing with the relevant leads. Record a decision that can be revisited as facts change.

Technical / legal: What evidence supports the next decision, and what remains unknown?

Business / insurer: Which costs or commitments need approval? What lesson changes the next response?

Role / meeting date / question / documents to bring

Recommendation / next action / owner / deadline / follow-up

Decision / limits: _____ Review cadence: _____

PRIORITY 1 / Action: _____

Owner: _____ Due: _____

Dependency / evidence: _____

Progress / next review: _____

PRIORITY 2 / Action: _____

Owner: _____ Due: _____

Dependency / evidence: _____

Progress / next review: _____

Keep completed records private. Share only what the recipient needs through an agreed secure channel.

Sources and your next connection

Primary resources checked October 15, 2026 (UTC). Recheck before acting. Blue underlined titles are clickable; [S#] references identify the sources below.

[S1] FTC: Data Breach Response

Response-team, evidence and communications questions for qualified advisers.

[S2] NJ Treasury: Report a Data Breach

Official starting points for NJ State Police and other reporting resources; counsel determines applicability.

[S3] FTC: Protecting Personal Information

Data inventory, access, retention and security planning for businesses.

General educational planning information, not individualized legal, insurance or incident-response advice. Requirements vary; qualified professionals and responsible authorities should confirm applicable decisions.

Need professional guidance?

Explore current professionals in the SJBA directory. Bring your questions. Roles in this workbook are conceptual; verify representation, qualifications, scope and availability.

About SJBA

Founded in 1994, the South Jersey Business Association is a structured, performance-driven, category-exclusive referral network for serious South Jersey business owners. SJBA does not guarantee member work or results.

Established business owner? Explore a meeting visit.
Visit SJBA for current resources and information.