SUCCESSFUL CRISIS MANAGEMENT FOR YOUR ORGANIZATION

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Introduction

How does your organization manage an incident affecting the whole company? Who is in charge? What are the triggers? What is the communication flow? Many companies, both large and small, have not carefully thought through the most basic aspects of crisis management. Crisis management brings together many, if not all, of the silos within a company (emergency response, disaster recovery, business continuity, and crisis communications) for one comprehensive response to an event. Companies who have not developed and exercised a successful crisis management team are likely to stumble in the first critical moments after an incident, wasting precious time.

Ten Disaster Lessons

Over the years, we have seen many clients of ours and other organizations make mistakes that could have been avoided. The goal of looking back is to learn from our mistakes and those of others, and hopefully not make the same ones going forward. Here are some of the common mistakes made in a disaster that we have seen. The company does not:

1) Declare the disaster and activate as early as possible. Leaders often drag their feet waiting for "all" of the information. "All" the information may not be available until months after the event. There is no problem with declaring the disaster, and then deciding an hour later to "stand down." Think of it as good practice.
2) Staff initially to a high-enough level. Don't let all staff go home until you know you have the help you need.
3) Issue clear and consistent instructions to staff. Let them know as soon as possible. The longer you wait, the more they will make decisions on their own.
4) Delegate authority to those who have been tasked. Don't just give the responsibility for a job to someone, but give them the authority to perform it as well.
5) Assume and plan for some degradation in team members, plans, and/or systems over time. Most plans are written assuming a short activation. The team wears out and the plan runs out of steam. In other words, you must closely monitor effectiveness and be prepared to make adjustments on the fly.
6) Avoid two common syndromes:
   a) "Been there done that!" That type of assuredness will get you into trouble. You won't see changes or things that are different.
   b) "We're a really smart group and we'll figure it out when it happens." This. Is. Deadly. Everyone needs plans, training, and exercises, regardless of how smart they are.

7) Make decisions and keep moving forward. Make a decision, make changes when necessary, and keep moving. Making decisions with incomplete information will happen; that's part of the nature of a crisis. If you make the wrong decision, reassess the situation, and make another. Keep moving.
8) Keep aware of what is going on, maintain situational awareness. It's very important to practice where you find out information, how you validate it, and how you display and convey it to leadership.
9) Communicate, communicate, communicate. There is likely never enough communication in any crisis. Don't hold back.
10) Account for social media, and the power of an individual to change a company's life forever. Everyone with a smart phone is a reporter and will capture your most embarrassing and awful moments. They will then post it on a social media platform. Count on this, and plan for it.

Organizing Your Team

Most companies have both a "tactical" team and a "strategic" team. The tactical team members represent key departments and manage the tactical response. The strategic team members are (usually) the executives and deal with high-level issues.

How is your tactical team structured? Most commonly, we've seen companies using their "usual" reporting structure. Although this may seem to be an appropriate structure, it doesn't always yield the best results. Some of the downsides include:

- Span of control may be too large for effective management.
- There may be too many silos of responsibility to be efficient.
- There might be a duplication of effort, or things may get missed altogether.
- There may be no clear authority.

An option to consider is structuring the team according to the Incident Command System (ICS) structure. ICS was developed in response to a series of fires in Southern California in the early 1970s. It is used by the public and private sectors across the U.S. and in many parts of the world to manage incidents. And since 2005, all federal, state, county, and city agencies and departments are *required* to use ICS. Check the FEMA website for more information on ICS.

Your Team Needs These Four Essentials

We have found that there are four things that your team must have mastered to be successful at managing a crisis:

1. Clearly defined team roles and responsibilities.
2. Defined incident assessment team and process.
3. Written incident action plan to guide and document team activities.
4. Timely and effective communications.

#1 Clearly Defined Roles and Responsibilities

Identify who needs to be on the team. Review your risk profile and your likely activations, and make sure that your team membership, plan(s), and checklists fit your expected risks. Once the team members have been identified, make sure that your plan has:

- Clearly defined roles and responsibilities for everyone on the team.
- Checklists for all positions.

For example, a partial checklist for a Facilities position may include:

- Assist emergency responders and support their work.
- Conduct initial damage assessment.
- Contact contractors and vendors.
- Order supplies and equipment.
- Document damage with video and still images.

Brainstorm with your team about all of the activities that would likely need to be done in most emergencies, and develop detailed checklists to assist everyone on the team in staying organized and communicating status. Develop a list, use it during your next exercise, then continue to refine it with each exercise or plan activation.

#2 Well Defined Incident Assessment Process

When an incident occurs, there are often a lot of assumptions about how information will be routed, who will be engaged, and how an activation will occur. When reviewing emergency plans, we have found they are often completely silent on how to get from the point of an incident occurring to activating the plan.

It is critical that you develop a clear incident assessment plan that includes identifying who evaluates the situation and the process that is used. This is called an Incident Assessment Team (IAT). An IAT is often comprised of key individuals in departments where most of the incidents likely occur. This includes facilities, security, technology, and key lines of business, plus the Incident Commander.

Incident assessment includes having clearly defined processes, a team that makes the assessment, and how to make activation decisions. A simple flow from incident awareness to plan activation often includes six steps:

1. **Awareness.** An individual Incident Assessment Team member becomes aware of an incident through a variety of means. If it could disrupt a mission-critical process or is a life safety issue, the team member then goes to step 2.
2. **Assembly.** In the event that the Incident Assessment Team member feels the incident may be significant, s/he will activate the full Incident Assessment Team, which then performs a formal assessment.
3. **Decision.** The Incident Assessment Team decides if the plan will be activated by asking the question out loud, "Should we activate?"
4. **Activate.** The organization's Crisis Management Plan is activated.
5. **Plan.** The team develops an Incident Action Plan (next section).
6. **Brief.** Executives are briefed on the incident.

#3 Written Incident Action Plans (IAP)

The Incident Action Plan (IAP) is one of the hallmarks of the Incident Command System and is critical for keeping your team organized, informing others of what you are doing, and getting assistance. You should be developing an IAP regardless of whether you use ICS or not.

An IAP formally documents the operational period objectives, and the response strategy defined by the team during response planning. It contains general tactics to achieve goals and objectives within the overall strategy, while providing important information on event and response parameters.[1]

An IAP is comprised of five component steps:

1. Gaining situation awareness / situation status.
2. Developing strategic objectives.
3. Assigning all objectives (to a team or individual).
4. Determining the operational period (the time between status update meetings).
5. Communicating the plan to all identified stakeholders.

Situation Awareness / Situation Status

This step is about finding out what's going on. There are many options to learn about the situation. It could include personal observations, talking with employees, vendors,

[1] What is Incident Action Planning, Public Health Emergency
http://www.phe.gov/preparedness/planning/mscc/handbook/pages/appendixc.aspx

government officials, and emergency responders, reading traditional and social media, and more. Think about all of the options and then determine how you will validate the information to ensure you are not acting on rumors or speculation. You will also need to decide how you will keep track of all of that data. In many fast-moving emergencies, people describe the amount of information coming at them as "drinking out of a fire hose."

Strategic Objectives

The strategic objectives are high-level statements of what you are going to do in this phase of the emergency. These objectives are short, clear, and descriptive, and state what action is to be achieved. The best strategic objectives are written with an action-oriented verb as the first word. This clearly tells the reader what the desired outcome is and provides guidance to the person assigned to achieve the result. The team or person who receives the objective may have many tasks listed under the objective to achieve the result.

Key action verbs include words such as:

- Inspect.
- Evaluate.
- Develop.
- Conduct.
- Alert.
- Prepare.
- Communicate.

Assign All Objectives (to a Team or Individual).

All objectives should be assigned to a person or a team. This is to ensure that everyone knows who is doing what and prevents other teams from "swimming in someone else's lane." In many emergencies, if ownership of an action is not clear, there are likely numerous people or teams all working on the same thing – or worse, no one is working on it at all.

Determine the Operational Period.

The operational period is how long to work on these objectives and actions before the team comes back together to assess status.[2] There is no set time for an operational

[2] ICS Training https://definedterm.com/a/definition/48051

period; it might be quite short in the beginning of an incident and get longer over time. It does not, however, exceed 24 hours.

Communicate the Plan to All Identified Stakeholders.

Once the Incident Action Plan has been developed and written, it can be then used to communicate to all of the key stakeholders. This includes the entire team, executives, other company locations, emergency responders, Boards of Directors, and others who require detailed information of the response effort.

#4 Timely and Effective Communications

As we all know, effective and timely communications don't just "happen." They take careful planning. You need three things to ensure that your communications deliver on the stated goal:

1. A Communications plan that includes authorities.
2. Pre-written templates.
3. The right tools.

Your Communications plan should identify three types of communications:

1. Emergency communications. Issued immediately at the time of an emerging life-safety issue. Examples might include public address announcements that would accompany a fire alarm, building lock-down, or other urgent issue that requires immediate response in order to save lives.
2. Tactical communications. General incident communications, factual information, instructions, and basic incident talking points.
3. Strategic communications. Broader, longer-term policy and relationship issues.

Once you have outlined these three types of communications, the plan needs to clarify:

- Who can write the communications. This reduces the number of people who think they may opine on a communication.
- Who can edit them. This helps to reduce the last minute "wordsmithing" that tends to go on.
- Who approves them. This allows them to be issued quicker.

Include pre-written and pre-approved communications templates for all three types of communication and identify the communication tools that you will use to deploy the messages.

Creating a Successful Team

A team doesn't become great simply because the right people have been picked, or the people picked are particularly smart or bright. They are great because they *practice*. Once you have selected the team and developed the plans, your work has really just started. You must provide regular training opportunities for them to incorporate the information into their very being. It needs to become "muscle memory" and this only comes with practice. The best training you can provide is to hold exercises. Engage your team, ideally in two exercises per year. One exercise can be more conversational (such as a basic tabletop); a second exercise should involve actual response activities.[3]

Going Forward

Remember, building a successful response team for any type of crisis requires only four things:

1. Clearly defined team roles and responsibilities.
2. Defined incident assessment team and process.
3. Written incident action plan to guide and document team activities.
4. Effective and timely communications.

Your next crisis could be just around the corner. Get started today.

[3] Emergency Management Exercises: From Response to Recovery, Regina Phelps, Chandi Media, https://www.amazon.com/Emergency-Management-Exercises-Response-Everything/dp/0983114307/ref=sr_1_3?ie=UTF8&qid=1474989398&sr=8-3&keywords=regina+phelp