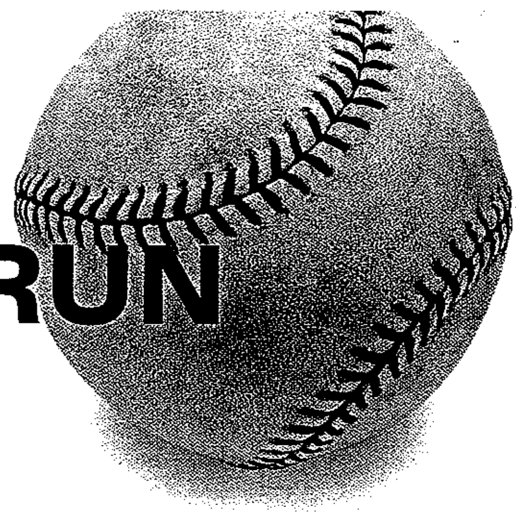

HIT A HOME RUN with Crisis Management

By Jim Goble

Your business resiliency program has never really gotten off the ground. Maybe it's a back-burner task, or you've just started the process. Either way, you've got limited resources. Maybe you've been recently reassigned away from the manager you "trained" and your new manager's first question to you is "What do you do?"

That's when you find yourself shaking your head and thinking "Where do I even begin?" Whether you are starting a new business resiliency program or trying to revitalize your existing program, taking a crisis management approach can build a strong, solid foundation.

Rules of the Game

It's important to understand what crisis management is and the value it can bring to your organization. My definition of crisis management is:

- the right *people*, with
- the right *authority*, and
- the right *information*, brought together in
- the right *timeframe*, driving
- the right *decisions* and priorities
- to *minimize or eliminate the impact* of a disruption on all stakeholders.

It makes sense, and it's something everyone can understand. But the real problem isn't defining crisis management—it's how to quickly, efficiently and cost-effectively implement a crisis management program—one that will amplify the success of a comprehensive business resiliency program within your organization. Used properly, crisis management can transform your team into a winning team, and you can be the slugger with a stack of dingers to your credit.

Stepping Up to the Plate

In the realm of crisis management, stepping up to the plate means getting management buy-in. You've got to get your manager to play you or you'll spend all your time warming the bench.

No matter how many times you may have tried before, you must get management's attention. Change it up. Try a curveball, where you've thrown fast balls before. Maybe there's been a change in management, or world events have occurred since your last attempt that would create a change of heart.

When proposing a project to management, you need to know what's important to them. They want to understand the problem being addressed, the proposed solution, the value brought to the organization, and the return on the time and money being invested. One manager may understand the value, another may see it as a regulatory function that needs to be addressed with minimal time and investment, and a third may be assessing your request against many other projects competing for the same resources. Because the perception of a business resiliency program can vary from manager to manager, both your approach and your request should be carefully considered to ensure you're not left standing in the batter's box getting called out looking at strike three!

An alternatative approach to the typical management presentation is to simply have an open, frank "when it happens" conversation with your management team. Even more powerful would be to discuss "what happened" during a recent incident, such as the H1N1 outbreaks in 2009. As the situation unfolded, you had certain areas—legal, security, human resources, facilities, management, etc.—that needed to be engaged in order to assess the situation, provide input, and monitor ongoing status. Additionally, resources were needed to conduct those meetings, such as a conference bridge line, meeting leader, issue tracker, etc. Next, discuss the issues that occurred and how you would like to formalize the process for future situations in order to eliminate the problems that occurred in the past. When you close the conversation requesting approval for a conference bridge, time to meet with your key stakeholders, and a ream of paper for printing wallet cards, you'll be rounding the third base of management approval and headed home to developing a low-cost, timely solution so you can begin creating wins in the development of your program.

Who's on First?

What's the hardest part of any project? Getting started! A wallet card (see figure, p. 13) provides the template for the key information needed in order to move from concept to reality. Walking through the response steps needed to make a proper initial assessment of an incident, we can see how the wallet card is a simple—but powerful—tool in setting up and executing your crisis management team (CMT). A wallet card will provide information about:

• **CMT Team Leads and Backup Numbers**—for identifying your key subject matter experts and contact information for initial notification and team engagement.

• **Assessment Conference Call Line**—tool for quickly beginning assessment of the situation. Having this on your wallet card reduces call time since you won't have to tell each person the conference bridge number and passcode. It also eliminates the chance to write down the wrong number which could cause a key member of your team to arrive late, or worse, miss your initial assessment meeting.

• **Assessment Meeting Checklist**—quickly gets the meeting started by providing a consistent starting point to ensure that key initial information is covered so stakeholders can make a proper initial assessment.

• **Status Line**—providing a consistent status update to reduce incoming calls and provide a consistent message.

• **Key support channel information**—web sites for incident information and secondary support resources engaged for specific situations.

• **Emergency Operations Center (EOC) and/or Recovery Sites**—establishes ahead of time where the team will meet in person, if needed.

The front of the wallet card is the easy part—just find the right resources and fill in the blanks. The back of the wallet card, your CMT teams, leads and backups, will take more effort. First, you need to determine which teams will be needed for your CMT to have the right subject matter experts available to address any issue that may face your organization. Each area of your organization should be represented.

After identifying the teams, you reach the most important part of this entire process: identifying your team leads and backups. If we look back at the earlier definition of crisis management, we see that it begins with having the right people. The right people on your team means that your team leaders and backups are:

• **Accessible**—able to jump onto an initial assessment call in a moments notice. Senior managers are less likely to leave a meeting or change their schedule unless the "sky is falling."

• **Knowledgeable**—able to present key information and support for their team's role, or at least know who in their area can determine the answer.

• **Tactical**—able to determine appropriate escalation for their senior management.

Your manager may be able to help you identify the right people for each of your teams or at least refer you to someone who may be helpful in narrowing down the right candidates for these positions. This brings you to the next critical point of your process: gaining buy-in from team leaders.

Your first thought may be to develop a slide deck, set up a web meeting, and send out an e-mail invitation to the meeting. A quick and easy way to tell your story and build a team, right? However, in my experience, I've found this to be the quick and easy way to failure. Why? Because the core to building any team is developing relationships, and this will be most successful in-person. Saying no to an e-mail is much easier than saying no to an actual person. Plus, we know that on a web meeting, people will be multi-tasking, not providing you with their full attention.

If your budget allows, set up an initial in-person introduction meeting individually with each of your team leaders to provide them an overview of the CMT and why you believe their involvement is critical to the team's success. When closing your meeting, provide the invitation to your in-person kick-off meeting and end with a simple thanks for their time which will go a long way in building your first impression. Now that you've started to build a relationship with each of your team leaders and developed the wallet card to document the key tools and team leaders needed, you're ready to put your crisis management team into scoring position.

Crisis Management Team Wallet Card

ASSESSMENT MEETING AGENDA

☐ Remind of **Meeting protocols** (announce name and areas before speaking, mute phone when not talking, don't place call on hold to avoid hold music, state facts – keep concise)

☐ **Roll Call** for key personnel

☐ **Situation Overview**

- Date & Time of Incident
- Type of Incident (Fire, Power Outage, etc.)
- Location and Address of Incident
- Suspected Cause
- Building Evacuation Status
- Employee Status
- All employees accounted for?
- Any injuries?
- Any personal needs preventing them from working?
- Civil authorities' response and protocol for access to damaged site.
- News media attention/reaction.
- What is the state of the building? What utilities are available (heat, A/C, phones, power)? Is it accessible?
- Does damage appear to be of a level we will need to make insurance claims?

☐ **Business Units and Services/Products Impacted** (Key Services not available and their status – red, green, yellow)

☐ **Communications** - Message to post to Employee Status Line and Call Trees to invoke

☐ **Summarize** the current issues, decisions made and key to-do's

☐ **Time and Location of Next Meeting**

Crisis Management Team Wallet Card

ESCALATION CONTACTS

Crisis Management Team Leader – Escalate Situations to this person	work	XXX-XXX-XXXX
	home	XXX-XXX-XXXX
	page	XXX-XXX-XXXX
	cell	XXX-XXX-XXXX
Alternate Crisis Management Team Leader	work	XXX-XXX-XXXX
	home	XXX-XXX-XXXX
	page	XXX-XXX-XXXX
	cell	XXX-XXX-XXXX
Direct Mgr / Supervisor – person who will provide direct updates to the employee	work	XXX-XXX-XXXX
	home	XXX-XXX-XXXX
	page	XXX-XXX-XXXX
	cell	XXX-XXX-XXXX
24-Hour Security Station, Network Control Center, IS Command Center (if no other contacts available)	work	XXX-XXX-XXXX
	home	XXX-XXX-XXXX
	page	XXX-XXX-XXXX
	cell	XXX-XXX-XXXX

COMMUNICATIONS

Conference Call Bridge: XXX-XXX-XXXX

Employee Update Line: XXX-XXX-XXXX

Crisis Management Team Only Status Line: XXX-XXX-XXXX

Online plans or employee information: www.websitename.com

ALTERNATE WORK LOCATIONS or COMMAND CENTERS
List address and directions to recovery site.

Pre-Season Games

Practice makes perfect, and you should start practicing right away, by scheduling an exercise. You may think holding an exercise at this point is premature. However, developing one or two simple exercises to use during your initial in-person kickoff meeting will produce the following successes in your program:

• **Engaging your participants**—instead of telling people their role, your team leads will have to look at the exercise scenario and then be able to explain their role to the other team leaders.

• **Building relationships**—your team will already have a situation of "simulated" adversity that they have worked together to persevere against as a team.

• **Gaining buy-in**—there is no presentation that you would make that could create the same buy-in for the CMT as actually working through a situation. Participants can also see the value of the wallet card as you simulate using each of the components of the card during your exercise.

• **Empowering the team**—during the exercise, the team is working through issues, contributing ideas on how the team should work, and taking ownership in making the team successful.

• **Developing their plan**—while each team leader writes down how their team would play a role on the CMT and the specific tasks they would go through to address the situation, they have already begun to develop the core structure, objectives, responsibilities, protocols and tasks for their team.

• **Creating the momentum for your program**—your team leaders leave the meeting understanding the value and why they are needed on the CMT. When they get that call a week later, they won't question why they need to dial into the CMT Initial Assessment Meeting!

With the wallet card and team tasks in hand, both you and your team leaders will leave the exercise invigorated about your understanding of what is expected as a member of the CMT, proud of the accomplishments made, and ready to work as a team when the next incident occurs. You're now at the moment where you are ready to slide headfirst into home with the winning run for your business resiliency program, as you activate the team in your first incident response.

On the Board

While your CMT leads have already bought into the process, your management will begin to notice the value the CMT brings to your company when the first situation occurs. Through the exercise conducted, your team will already know what protocols and procedures the team should follow to be successful and achieve the last part of the definition of crisis management: to minimize or eliminate the impact of a disruption on all stakeholders. Protocols that will aid in the CMT's success are:

• **When in doubt, call it out**—and to all teams! Any member of the team should be empowered to request that the CMT Lead conduct an initial assessment call of the CMT. You trust them to lead a team, so you should trust them to know when the CMT should convene to assess a situation. Furthermore, when starting out, make sure all team leads dial into the initial assessment meeting. Let them determine their level of involvement as you might not know how (or if) they can assist in each unique situation.

• **Start meetings on time**—right from the first incident, get in the habit of starting meetings on time. Once a person is late to a couple of meetings and knows you won't waste time doing a recap for those that join late, you'll set a precedent.

• **Roll call of key teams**—there may be key areas you want to ensure are on the call before you start the meeting, otherwise you may not be able to make an accurate assessment.

• **Identity yourself**—when speaking, ask that the person identify themselves so all other callers understand the perspective of the information or question.

• **Start by reminding people to mute the phone**—we've all been on a meeting with the background noise of keyboards or somebody joking around. Self-explanatory!

• **Don't solve issues**—your meeting's primary objective is to provide a current status of the situation and outstanding issues as well as to identify any new issues. For this reason, set a goal to complete each assessment meeting within 30 minutes. If an issue can be resolved in a couple of minutes, you might want to allow time for the discussion. However, for most issues identified, cut off any discussions on resolving the issue, document the issue, and identify a person who will own the resolution of the issue and report on the status of the issue in the next assessment meeting. Additional meetings outside of the CMT assessment meetings will be held by the issue owners to resolve outstanding issues.

• **Use applicable areas of the wallet card agenda**—the agenda provides consistency in addressing key information that should be covered in your assessment meetings. However, if an agenda item doesn't apply, don't confuse people or waste their time reviewing the item.

• **CMT is the source of information**—your team has the subject-matter experts so they should be the source of your information, or validate information heard from another source before reacting. For example, if you heard from an employee they are evacuating a building because of a fire, have your facilities team validate that information.

Valuable Take-aways Yours for the Asking!

Explaining crisis management is useful, but sharing actual crisis management tools is amazing! And author Jim Goble is doing just that: For an exhaustive list of crisis management team overviews and responsibilities, a sample CMT meeting agenda and minutes template, as well as a sample crisis management project plan, contact *CI* Editor Buffy Rojas at buffy@continuityinsights.com, and she'll send it your way right away!

• **Stoplight system**—having your business units provide a status of red, yellow or green allows you to quickly move through status updates. For red (some or all business unit functions aren't working), you will want more information as to the issues causing the red status. For yellow (business functions not operating as normal levels, such as using work-arounds with limited function), you may want more information in the meeting, or you may want to have it sent to you outside of the meeting to save time. For green, further explanation is not needed.

• **Predefine executive engagement**—knowing ahead of time who will notify or engage executive management will ensure your executives are consistently engaged at the appropriate level.

• **Create email templates**—both your alerts and your updates on a situation will contain the correct amount of information if a template is pre-established and approved by your CMT. On the most basic level, you want who, what, where, when, why, how long, current status and current issues. Having a standard email subject line like "SITUATION ALERT" will also help to identify CMT-related emails.

• **End meetings with a brief recap**—before ending the meeting the CMT lead who is running the call should provide a brief summary of the overall status, key decisions made and key issues to be addressed before the next meeting. This provides the opportunity to ask if anything was missed in your summaries before leaving the call. The last piece of information before ending the call should always be when the next assessment meeting will be held.

Grand Slam!

With your CMT minimizing or eliminating the impact of situations on your organization and your client, it won't take long for your management to see the value your business resiliency program brings to the organization. Why wouldn't they? You've quickly implemented a minimal-cost process that provides value to the company with each situation that occurs. Furthermore, you're breaking down silos and building a culture of cooperation as the CMT works together to quickly recover from incidents—something that could be integrated into other day-to-day operational issues and projects.

Building on these wins from the CMT lays the foundation for you to ask management for additional time and resources to take your business resiliency program to the next level using risk assessments, business impact analysis, detailed plans, etc. Additionally, your proposals will be much more palatable now that your management team has a full understanding of the process and the value your team brings to the company. **CI**

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