

TAKING THE CRISIS OUT OF CRISIS MANAGEMENT

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START AN EFFECTIVE CRISIS COMMUNICATIONS PLAN TODAY

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EXECUTIVE SUMMARY

Crises in for-profit, non-profit and the public sectors are a natural occurrence. Like fires, some start spontaneously, while others are the result of human actions that cause a smoldering situation. In the end, however, the outcomes are the same: a disruptive event that creates loss of lives, loss of assets, loss of revenues, loss of jobs and even complete loss of organizations.

Yet, while people, process and practices generally are well planned and routinely marshalled to attack fires, the same cannot be said for institutional crises. In a 2016 survey of public relations professionals by NASDAQ and PRNews, only 50% of the organizations represented had adequate preparation and ability to effectively manage a crisis. In one key measure, fewer than one in four reported holding annual media trainings for CEOs and designated spokespersons.

Crisis planning and readiness is within the grasp of all organizations. While lack of resources often is cited, failure to have critical practices and tools developed, tested and in place could be the original “penny-wise, pound foolish” situation, when all of a company’s chips are on the table.

Like most situations, tackling a big challenge is far from impossible. It is a matter of breaking the venture into disciplined steps.

CRISES

FAR FROM A STATISTICAL ANOMALY

College admission scandals. A global pandemic. Gun violence. Opioid dependence. Data breaches. Sexual abuse. Racial injustice. Naming just a few crises illustrates there has been no shortage of highly negative and even volatile disasters in recent years.

In these examples, and many more like them, day-one news stories delivered details of persons, groups and communities impacted. Yet, after the breaking news hits the streets, attentions generally turn to the companies and institutions viewed as being at the crux of the matter. Designers, builders, sellers, buyers, regulators and others who touched a product or service deemed defective or inappropriate become the target of the search for the responsible party in the court of public opinion, where “guilty until proven innocent” often is the standard. Whether the result of citizen journalism and social media access for all, eroding trust for business and industry or one of numerous other reasons, the situation seems to have gotten worse each year for some time.

As a result, the topic of major incident and crisis communications has been well documented, with countless how-to handbooks, videos and consulting engagements produced for individuals and teams at all levels of leadership.

The most significant critical success factor in crisis management? What is discussed and done before the crisis hits.

Unfortunately, the vast majority of items in the body of knowledge on crisis management and communications largely are focused on what happens after a crisis strikes. Experiences with crises big and small tend to prove that the most significant critical success factor in crisis management is what is discussed and done before the crisis hits.

Likewise, and equally significant, is recognition that crises are far better viewed from the perspective of when they will happen, not if they will happen.

In short, crisis management and communications is about recognizing the reality of crisis potential AND taking the necessary steps of preparation. However, while tried and tested approaches play a key role in this process, a missing key factor frequently is a culture of awareness and preparedness for disruptive events. The facts document the issue.

REVIEW OF THE CRISIS MANAGEMENT TRACK RECORD

UNSETTLING AT BEST

In a 2016 NASDAQ and PRNews survey of public relations professionals, 346 respondents painted a concerning picture of the state of crisis readiness for their organizations. Among the findings, by the numbers:

52%

Organizations claiming existence of a crisis communications playbook.

50%

Organizations feeling adequate preparation for effectively managing a crisis.

48%

Organizations monitoring social media.

37%

Organizations implementing role-play crisis scenarios one or more times in a year.

24%

Organizations engaging CEOs and designated spokespersons annually in media training.

If these metrics were associated with teaching people to drive, the incidence of car accidents and fatalities would be off the charts.

As basic as the analysis, many businesses are ill-prepared to address a crisis situation in their organization. The reality is nobody will know how prepared or not their organization is until presented with a real crisis.

INVEST IN WHAT'S IMPORTANT

Among the list of statistics on crisis preparation and management, missing is the actual cost that companies have experienced by being inadequately prepared for crisis. The likely reasons are numerous, from not being able to fully and readily quantify the impact to concern for creating further damage. However, further review of literature on the subject indicates the impact can rapidly create at least a 30% reduction in the value of an organization. From first-hand

experience in the corporate arena, bad crisis preparation can end in financial ruin.

Nonetheless, these points should serve as an organizational wake-up call to those institutions that are not adequately prepared, for there are countless examples of what happens when a crisis arises without planning.

Critical to exiting the 'unprepared' mode is having a solid culture and ethics focused on doing the right thing.

Critical to exiting the “unprepared” mode is having a solid culture and ethics set, focused on doing the right thing. Framed as a question, where do organizational values intersect with a crisis?

For entities that are inherently connected and aligned to communities, either literally or virtually, having proactive crisis management and communication is essentially a foregone conclusion. Crisis and incident management

team members will be predisposed to doing the right thing for their stakeholders and typically include appropriate, effective action planning and preparation.

For organizations where community and stakeholder relationships are secondary to other key performance indicators, a bridge rooted in corporate reputation and core values must be created between these two different priorities.

No matter what, crisis preparation and training compete against numerous other organizational budget and time demands. And, given the direct, visible and usually immediate business impact of shifting resources from most other expense lines to an un- or under-funded crisis management and communication program, it is understandable why investment in this area is inconsistent. That is, until an event occurs, impacting overall reputation management, financial performance and basic organizational viability.

WHO REALLY “OWNS” CRISIS?

If there is one question that comes up most frequently in a discussion of crisis management, it's that of ownership of the authority and responsibility of the process and outcomes. If 10 experienced and knowledgeable individuals were asked this question, there could be 10 – or more – answers.

It is the duty of executive leadership to assess all potential aspects of a crisis to determine where to house and whom to place on the working group. Simply put, good teams consist of good team players – able to collaborate, negotiate and cohesively arrive at answers to a broad range

of topics, from highly strategic to very tactical. Additionally, positions in this group are periodic assignments, typically drawn from within the everyday staffing needs of the organization.

The balance of this paper is framed to address the critical reputation management perspective from the communications and public relations disciplines. However, managing the wide range of business functions typically present within crisis management requires a holistic group of professionals to stop any damages, correct the situation, restore normal operations and maintain stakeholder confidence.

START DURING THE CALM

Acknowledging the potential for a crisis and proactively developing a baseline plan to address such an event requires a fraction of the effort and financial commitment of doing so under “bet the business” circumstances. In fact, preliminary crisis planning is a task a business typically can take on with a high order of success, largely because effective crisis preparation comes from knowing the enterprise.

Any good business analyst knows that the first step in addressing a challenge is to step out of the tactical arena, thinking first about the task

strategically. The initial question must determine how crisis management and communications, in fact, fits into the organizational culture. If this process exists solely to check a box, any planning likely will underperform public and other stakeholder expectations in nearly any situation.

Crisis planning is simply a series of workable tasks.

Crisis planning and preparation function best when fully endorsed by senior leadership and when it becomes an evident and sustainable aspect of the culture. For example, companies with strong, foundational capability for creating a predictable, daily environment of physical safety tend to be able to readily transition that core value to managing crisis situations. Leaders in those spaces include reputation management in their assessment of various potential crisis situations: “Are we prepared to address an issue with this product/service/location/team/customer/stakeholder?”

When organizational culture drives crisis management and communication, these entities typically have broader team engagement with a common set of values. While good crisis preparation focuses on a defined core team, the strongest organizations have many people who can play two or more roles on an ad-hoc basis in helping resolve a reputational incident efficiently and effectively.

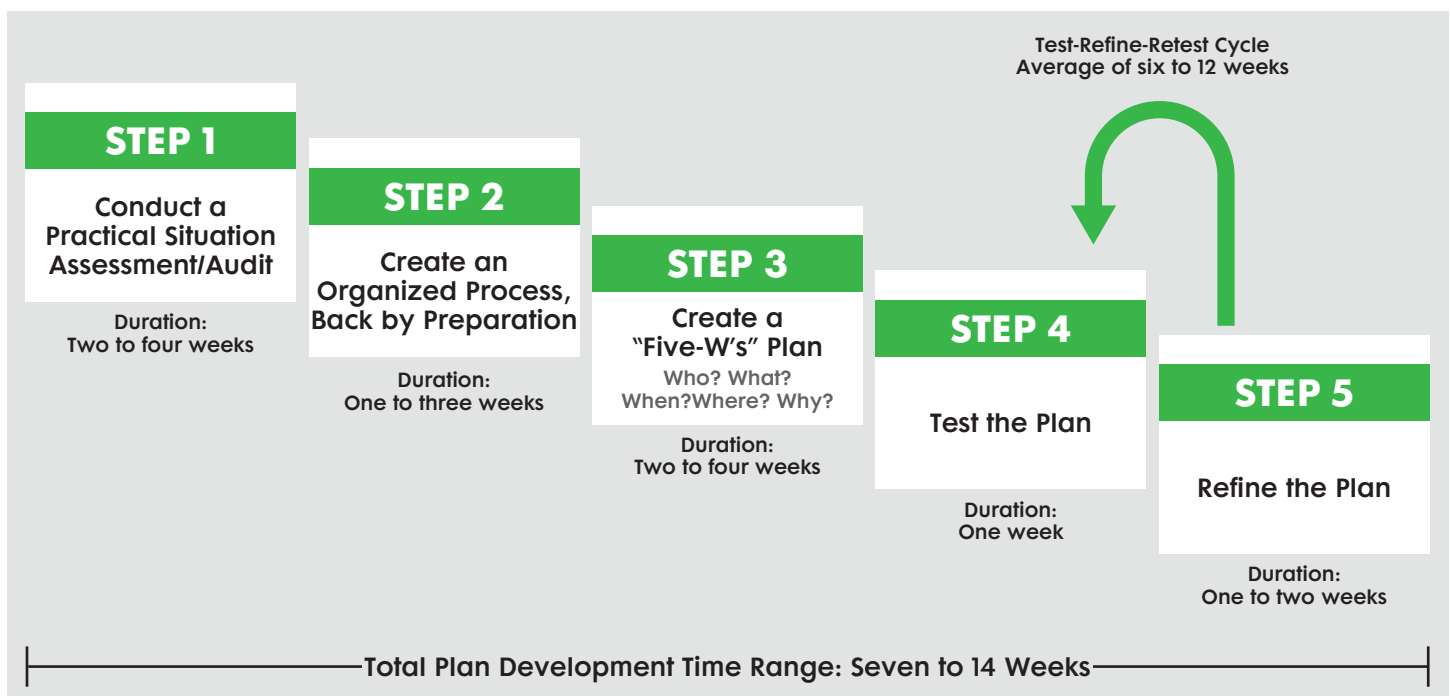
CREATING A WORKING CRISIS COMMUNICATIONS PLAN

By nature, crisis planning and management is a complex, multidisciplinary environment and task. Step into any incident command operation and you immediately see the breadth of topics addressed at different workstations: Communications, finance, operations, policy, safety and transportation, to name the most frequently represented areas of expertise.

These disciplines – and, potentially, additional areas – have plans that must integrate across

the entire incident team. Accordingly, in developing a crisis communications plan, this integration must be actively addressed in moving the process forward. Overall crisis or action planning is a series of workable tasks, no different than any other project. It consists of completing a series of manageable steps or planning segments that lead to creating plans for avoiding, addressing and recovering from an incident.

CRISIS COMMUNICATIONS PLAN DEVELOPMENT OVERVIEW



STEP 1

CONDUCTING A PRACTICAL SITUATION ASSESSMENT/AUDIT

Once fully committed to proactively preparing for an incident, the first step is to inventory points of exposure.

For organizations built around handling dangerous substances or use of processes that have inherent risk, the initial inventory typically is straightforward, usually mirroring existing safety and security practices. However, for service organizations, general offices and other seemingly lower pressure settings, uncovering realistic risks may be more elusive. However, risks in those seemingly low-risk environments can be equally or even more damaging and should be included in a crisis plan.

Reputational risk assessment is a collaborative process with internal leadership responsible for general risk management, communication, security, human resources and organizational reputation. For organizations that do not staff these functions, but for which an overarching culture of commitment to risk and reputation management is a priority, generalist senior leaders generally step into the assessment role.

Organizational crisis categories addressed in an initial assessment typically include:

- Operational – production, quality control, data security.
- Safety – employees, customers, suppliers, visitors, neighbors.
- Reputation – the view and opinions of key stakeholders.
- Financial – theft, crime, integrity.
- Governance – ethics, morals, accountability.
- Communications and Community – environmental safety, quality of life, values, corporate messages.
- Issues that could serve as a precursor to crises.

Using these assessment points, it is likely that a significant number of potential crisis sources will be identified. From there, it might be tempting to start scaling and scoping a team to take on all the identified potential sources of crises. However, two steps should be taken to avoid a resulting “paralysis by analysis” scenario that can come with such an initial deep dive:

- The most significant driving force within a crisis management situation is, once again, the overarching culture and values of the organization; individual scenarios identified should be assessed through the lens of the broader strategic values of the organization.
- Once armed with an initial list of potential crisis situations, each should be passed through two additional filters – first, what is the likelihood of the situation occurring and, second, what is the seriousness of the scenario to the previously noted organizational crisis categories; select the top two or three scenarios as the test bed for applying your organizational culture and developing a process for addressing and shedding reputational issues that likely would accompany the prospective incident; as the plan is further developed, additional incident scenarios can be considered within the context of the action plan.

Effective crisis preparation comes from knowing the enterprise.

STEP 2

CREATING AN ORGANIZED PROCESS, BACKED BY PREPARATION

Armed with clarity of culture and a short-list of potential crises, core action planning and preparation follows. In doing so, recognize that the strategic goal of crisis management and communication is to avoid or mitigate damage to

organizational reputation. The approach of this planning process aims to bring the appropriate amount of procedure, structure and support materials necessary to achieve that goal.

It's critical to resist the urge to anticipate and create detailed documentation to respond to every minute detail of any number of specific crisis situations:

The primary content of the resulting crisis management and communications plan should be a one- to three-page, sequential action checklist. Specifics of individual scenarios and tools used to operate the plan should be appendices behind the action checklist.

The right approach is to develop a strong, yet flexible, core framework that will serve the broader needs of the organization and not bog the team down in taking action. Focus, first, on providing a structured sequence of actions – from notification of an incident to conclusion of the crisis – as the very first component of the plan, then develop materials to support the plan that will be presented as appendices to the action plan.

The purpose of the front-section action plan is to ultimately guide management and communication

activities during the first 24- to 48-hours of the incident, segmented by operational periods of 8 to 10 hours. In the event it becomes apparent that an incident will surpass a 48-hour period, a member of the crisis team should take on the task of mapping activities and responses required during the extended timeframe.

In implementation, the action plan and supporting core materials developed in the pre-crisis preparation phase are checked for current appropriateness and tuned, as needed, to the situation. An initial cadence of the incident is determined and planned resources – people, facilities or equipment, whether for a short or extended period of time – can be arranged and deployed as required by the situation.

By building on a broad culture of core values, a “what’s most important next” mentality and an easy-to-implement crisis process, handling challenging incidents and difficult situations will become almost second nature.

STEP 3

ORGANIZING THE PLAN USING THE FIVE W’S

The well-renowned five-W’s provide a solid structure to channel countless elements and considerations into a concise, yet flexible, plan:



WHO

The *Who* is about the team in place to quickly respond to an imminent or actual crisis.

The team starts with the Incident Commander, who is responsible for integrating the people and actions representing all disciplines involved in addressing the crisis. Most of the individuals on this chart should be standing members, since much of the success of the team comes from developing strong, intuitive relationships, able to scale the team’s responses to whatever crisis is presented.

The Executive Sponsor represents the organization’s senior-most internal stakeholders and, most importantly, holds the team and corporate leadership mutually accountable to corporate goals, culture and outcomes.

Note that the Executive Sponsor likely **is not**

synonymous with the CEO, but likely is another highly placed and respected senior organizational leader. In the event of an actual incident, the CEO likely will have a role to play with the team, but also will have a number of interests outside the group that must be addressed, making her or him unavailable to actively serve on the crisis/major incident management and communication team.

Key organizational disciplines are represented on the Incident Command Team, providing centralized functions in assessing, addressing and concluding a crisis incident. Each serves as the leader for the extended team within their respective disciplines.

The team typically is rounded out by subject matter experts from other key organizational functions, usually those with high likelihood of

connection with the specific crisis not already represented on the team. Additionally, having one or more administrative staff members on the team provides an essential support function required by the entire team to function efficiently and effectively. The total number of team members should be aligned to the relative size and scope of the incident and overall size of the organization.

In assembling the *Who*, having a detailed contact list for each core and incidental member – including all available contact information – is

WHAT

The crisis team has an overarching *What*, which is the effective management of and communication about the incident. The team prepares the process for managing the lifecycle of a typical crisis:

- Reviewing and updating the situation appraisal for potential crisis situations.
- Collaborate on a basic process for flow of people and information – as previously noted, initially focused on the 4 to 8 hours from awareness or report of a crisis situation, then expanding out through the first 24- to 48-hours; the customary range of activities is from identification of a crisis situation to the after-action report following an actual incident, under a designated team member who owns responsibility for process development and ongoing management.
- Addressing the timing and the sequence of activities is critical to success in managing a crisis situation. See *When* for information on plan deployment and conclusion.
- Developing and deploying core management and communication tools and materials, customizable to support a wide range of potential crises.
- Creating an alerting process for all or a part of the team for assessment of the seriousness and extent of the event and level of activation.
- Identifying potential resources not inherently a part of the core response team, such as local officials or public safety leadership.
- Activating all or a portion of the team, depending on the assessment and nature of the event.
- Reinforcing and applying a culture of crisis avoidance and mitigation as an overarching aspect of the crisis team and process.

essential. Since crises seem to disproportionately occur during nights, weekends and holidays, paying particular attention to after-hours contact and typical holiday location information is important. The list can be started during the initial development of the crisis management and communication team, then expanded upon at the first and subsequent meetings of the team. This roster should be the first appendix to the core process/checklist, subject to regular review and, as needed, revision.

What happens and what is done during the first four to eight hours largely will define the level of success in the crisis response. Ability to identify and initially address the crisis in the first one to two hours generally will start setting in place stakeholder confidence. In hours two through three, providing additional information and real evidence of actions taken will reinforce and deepen that initial confidence. Activity in hour four and beyond is about seeing the plan through to completion, modifying the approach, if necessary, to deliver successful resolution. With regard to critical steps or necessary tasks, beware of too much granularity, which can shift the focus from stakeholder-facing outcomes to box-checking. Know what needs to be accomplished – particularly in the early stages of a crisis – and deliver the appropriate outcomes. A situational approach to specific tasks allows for the fluid nature of a specific incident and surrounding situations. Experience suggests that a two- to three-page checklist of key process points that cover the initial four to eight hours and, then, out to 24 to 48 hours typically is the right level of detail, though this will necessarily vary with the scope and complexities of the organization. The idea is to not weigh down the crisis team with process-heavy details. Rather, the checklist exists to make sure that critical deliverables and outcomes are addressed. Most of the process and behaviors used in an actual crisis situation result from being ingrained during pre-crisis preparations and drills.

What is done during the first four to eight hours largely will define success in the crisis response.

Of critical note to this time period is crisis team shift management. While some crisis situations can be resolved within a single shift of reasonable length, others may take numerous days before the work becomes somewhat routine or is concluded. Crisis management and communication teams can easily get caught up in the momentum of restoring a normal state and not recognize fatigue

that can set in when operating at intense levels. Ensure a strong, consistent focus by alerting prepared back-up personnel, briefing them toward the end of the first response shift and turning the incident over to a fresh team. Tasks in the short-form checklist at the front of the plan that extend to second and subsequent shifts tend to build on baseline items and activities set in the first eight hours, typically resulting in fewer moving parts for relief team members.

Behind the initial action section of the plan will be a series of appendices containing core materials that will enable rapid engagement during a crisis. These include, but are not necessarily limited to:

- Operational resources, such as:
 - Key lists
 - Templated communications tools that can be adapted to the specific incident
 - Credentials for access to shared systems, such as media databases, blast email platforms, shared file storage, etc.
 - Tracking forms – media, government agency
- Public-/media-facing materials, including:
 - Organizational history, emphasizing positive safety records and accomplishments
 - Key corporate messages
 - Brief leadership biographies
 - Any other assets for public consumption that support company communication during and beyond the crisis

WHEN

The team's *When* is measured in two stages: 1.) Routine preparation and maintenance of team readiness to respond, and 2.) crisis management and communication incident response.

ROUTINE PREPARATION AND MAINTENANCE

To maintain relevance and readiness, the crisis management and communications team must have a basic set of requirements for periodic meetings and exercises in order to be functional, no differently public safety responders and similar organizations. Membership on a crisis team naturally will change as people exit, enter and change roles within the organization. Likewise, the entity for which planning is being conducted likely will have changes that impact preparation for and management of crisis situations, such as the addition, deletion or change in risk scenarios. Regular reviews of the plan – at least annually and preferably twice a year – and periodic testing ensure the team and the broader organization are prepared and optimized for response.

In developing the initial plan, attention should be paid to means of receiving notification of a crisis incident. Because the team is multidisciplinary in

Note: Any public-/media-facing tools chosen for use should be readily available via the Internet.

Once completed, the crisis communications plan should reside in two places for each team member. A hard copy in a binder should be placed in the trunk of the vehicle the team member will most likely use in travelling to the incident command center. The second should be in a folder on each team member's laptop.

The designated custodian of the Crisis Management and Communications plan should regularly recommend updates to the plan to team members, as appropriate, and distribute updates to all members that supersede existing or historic versions of the document. At a minimum, a review of the plan should occur immediately following any drill or actual implementation. Distribution of a revised plan should occur only after review of the team and approval by the Incident Commander.



nature, a wide range of physical and operational points are represented on the group's membership. This mix of personnel generally contributes to good situational awareness.

Other sources of information on an impending or breaking incident will be internal safety and security team members, dispatchers and the general workforce. Periodically engaging with these groups and reminding them of the importance of reporting anything out of the norm as they go about their daily activities sustains an important channel of information on potential crises. Externally, relationships with local public safety and emergency management personnel not only provide another channel of real-time information, but also can create additional efficiency and effectiveness in any situation that becomes an active situation

These sources of information should be asked to contact the standing crisis management and communications Incident Commander or Public Information Officer to report an incident. Part of this request should include making calls until

INCIDENT RESPONSE

In the event of an actual incident response, all the planning, preparation and practice is put to the ultimate test.

Upon notification of an incident, the Incident Commander and one or more members of the Crisis Management and Communications team should rapidly confer on the seriousness and extent of the reported incident to determine the level of team response needed. Events that are well confined with no significant potential for life safety issues and limited potential for operational interruption or asset damage generally can be handled with less team involvement. Opening of a formal incident command post generally is not necessary in such situations. However, those team members who are activated should be mindful of their immediate availability to respond if the situation drives stakeholder engagement and/or escalates into a major event.

If the event is material or significant in nature, the full team should be activated using procedures and channels defined in the crisis action plan. The group should convene in the primary, secondary or alternative incident command site, according to information provided in instructions included in the activation communication.

The crisis management and communications team then will follow subsequent steps provided for in the action plan, using defined protocols, procedures and tools. Of particular importance, particularly in major events, is for the administrative member(s) of the team to start logging and documenting significant activities for review by the team following conclusion of the event. With the support of the HR representative, the Incident Commander should continuously

WHERE

Likewise, *Where*, can have several meanings. For single geographically located operations, it is about having proper logistics in place where the crisis team operates when activates.

Appropriately accessible workspaces in a single, larger location are needed for persons from each of the functional areas who are supporting their respective leaders on the crisis team.

Provision should be made for space to support news media briefings and other activities. This room should be sized according to a typical local/regional support, recognizing that an incident of national proportion will require use of a larger amount of space. Media facilities should be equipped and convenient, yet separate, from the crisis operations or incident command area.

either of these individuals or a member of the general leadership team are reached in-person, either by phone or another clear communication exchange, such as a text exchange.

size up demands on the team, the trajectory of the event and estimates of the total scale and scope of the incident response to gauge staffing needs for second or subsequent operational periods.

Each member of the team will perform the tasks assigned in the definition of their role within the plan. Each member, generally as a leader within the organization in non-crisis times, should also keep a more generalist view on the overall direction and cadence in order to support the Incident Commander as needed.

Activities of the crisis team will continue until the leader of the operational period – after consultation with the incident Commander, if not one in the same person – determines that the incident has been addressed and the focus of all the organization’s resources has moved to the restoration process. The Public Information Officer should maintain periodic contact with leaders of the restoration effort to be able to keep key stakeholders appropriately informed.



Consideration also should be given to the possibility that the identified crisis operations facility could, in fact, be impacted by the crisis. Accordingly, a back-up location and one or more remote options for an ad-hoc incident command facility should be identified, surveyed and appropriately equipped for use.

Facilities for appropriate media visitors to the crisis communications area should include:

- A means of credentialing, monitoring and maintaining security for working areas.
- Functional seating and work surfaces.
- Access to the public Internet (isolated from internal networks), preferably via both Wi-Fi and physical connections, and an appropriate number of telephones (recognizing that demands for connections and voice devices will vary with each occupant of the media center).
- A magnetic white board with markers and an eraser for displaying current documents and key information.
- A limited supply of basic informational documents should be kept on hand, though most distribution should be in real-time via the Internet.

WHY (AND HOW)

Be careful to distinguish between an appropriate *Why* and an inappropriate *Why* in the crisis management and communication process.

THE APPROPRIATE WHY

Organizationally and operationally, the proper and immediate question of why is about conducting a process that safeguards any potentially impacted communities, protecting and enhancing the entity's reputation. How an organization responds to a crisis leaves a lasting impression, either positive or negative, on its stakeholders. Experiences indicate institutional credibility can increase for companies with strong, proactive approaches and close connections with the

community after navigating a major incident. Additionally, businesses operating in high-risk industries – such as refining, transportation or many types of manufacturing – need to retain both official regulatory permissions and unwritten social “licenses” to operate. While loss of operating permits can have tactical implications, losing the trust of neighbors and the community at-large can make it difficult or even impossible to remain a viable enterprise.

THE INAPPROPRIATE WHY

Often presented in the form of a how, the inappropriate why comes from speculation as to the cause of the incident that triggered the crisis. Members of the operations team may need to take immediate, corrective action to gain control of a potentially devastating incident. However,

time and effort spent focusing on what led to the crisis situation takes away from protecting people and securing property directly involved in the crisis event. There will be time after the event has concluded for investigations by appropriate experts and authorities.

STEP 4

TESTING THE PLAN WITH A TABLETOP EXERCISE

Equipped with a core crisis process and an initial set of customizable resources, coalescing the team continues through the testing of these items through one or more initial exercises, starting with a tabletop walk-through. The crisis response team executive sponsor or another designated team member selects a potential crisis situation, develops a base scenario and a series of developments as the situation advances, then engages the core crisis team in running the selected scenario.

Simply put, the tabletop format skips theatrical casting of all the usual roles of a full crisis drill – no “victims,” “officials,” media or others in the cast – as well as the real drama of waiting to test the process, people and materials until facing a real crisis situation. Key players gather in a space and progress through all the crisis management steps the developed process would have them do, only in

a compressed timeframe. Movement through the process can be stopped as many times as needed, for as long as is required, with the goal of gaining experience with the overall concept and appropriate response messages and activities. Tabletop exercises frequently identify missing steps and supporting activities because representatives of all the disciplines involved in a real crisis are participating and observing events in the test session.

A tabletop is best conducted in a pre-scheduled manner, involving core team members identified in the plan. The scenario is walked through by the core team to identify any missing preparations, steps, materials or people involved in a manner best compared to an open book test. An administrative support member should serve as scribe to this process, noting any aspect of the process or tools where additional development – for example, additional steps, support materials or people – might be indicated. This information is used to update the plan and process.

This first test of the process should be conducted on a start-stop basis. Anyone participating can freeze activities to ask a question about the responses at hand, roles involved, timing, sequence or essentially any other aspect of the response. In addition to clarifying and confirming individual activities, this approach builds familiarity among the team for the order of activities.

Equipped with the experience of an initial tabletop exercise, adjustments should be made based on learnings from the experience. A second tabletop exercise then should be scheduled, preferably shortly after the first, to benefit from that initial experience. In the second run-through, the only shifts in focus should be decisions by the facilitator to advance the time and situations encountered to fit the full exercise into a compressed timeframe for efficient use of team member time. While starts and stops still are acceptable, this version of the tabletop should be far closer to how a real event would operate and feel. If the Incident Commander feels it appropriate, a subsequent test of the plan could include one or more surprise elements, or could be an unannounced drill.

In considering all opportunities to test crisis response, the team should be mindful of scheduled exercises designed to test other operational aspects of the organization, particularly when mandated by licensing or regulatory requirements. By integrating a crisis management and communications drill into these regular testing activities, a better view of interoperability issues could be experienced that otherwise was not surfaced through the earlier tabletop events.

In conducting any sort of drill activities, the opportunity exists to update the master crisis team roster and deliver any pertinent announcements to participants with most, if not all, of the full crisis team present.

Response to a substantial crisis event impacting a significant number of individuals, critical public infrastructure or significant natural resources may be subject to close coordination, collaboration and even transfer of leadership

PROTECTING YOUR REPUTATION DURING A DRILL

If not handled thoughtfully and intentionally, a crisis drill can cause unwarranted concern and, potentially, physical and reputational damages. These steps can minimize risks during drill activities:

- 1) All drill communication activities and messages must be identified as such and not a real emergency, particularly those that may be transmitted across open communications channels, such as via emails or two-way radio.
- 2) First responder agencies in jurisdiction should be alerted in advance to any drill activities, other than tabletop activities, in the event incomplete and/or inaccurate information should make its way to outside parties.
- 3) If the process and scenario being exercised is expected to or may involve outside entities – for example, public safety personnel, municipal staff or elected officials – these individuals should be engaged in advance, informing them of an imminent drill. They should anticipate the potential for their involvement, including drill-related communications delivered to them or members of their teams.
- 4) When the drill has been concluded, anyone engaged in the exercise who is not part of the crisis team should be informed that the drill has concluded. This will establish that any subsequent activity should be treated as a real incident unless similarly identified as a drill or exercise.

to one or more units of government, from the local office of emergency management to state or federal agencies, such as the Army Corps of Engineers or the U.S. Coast Guard. These entities can implement an Emergency Operations Center and/or a Joint Information Command to facilitate and streamline crisis or disaster response. More information on the U.S. Federal Emergency Management Agency's materials and methodologies can be obtained from your city or county office of emergency management.

A debrief session and associated documentation should be produced to inform timely revisions to the crisis plan.

The time following the conclusion of any crisis activity, whether a drill or a real event, can be an indescribable series of feelings and emotions. Typically, hours well beyond a normal work schedule, unmatched operational demands and reputational pressure often can lead to exhaustion.

However, all experiences with the crisis management and communications plan affords an opportunity for continuous improvement in the process. At the conclusion of any crisis activity, from tabletop to actual crisis response,

a debrief or after-action session and associated documentation should be produced to inform timely revisions to the crisis plan. Included in this activity should be:

1. Assembly of all records – paper and electronic – for memorialization of the event and response, consistent with the organization's records retention policies. In particular, these items help in analyzing internal processes and external engagements.
2. The full crisis team should walk through the event, from notification to declaration of completion to determine aspects of the process that functioned well and where opportunities may exist to resolve any identified deficiencies.
3. Where warranted, the debrief should also include a general review of staffing, response time, facilities, logistics, team communications and key stakeholder outcomes.
4. At completion of the debrief session, a list of revisions to the crisis management and communication plan should be recapped and a team member assigned to update and replace all previous plans in circulation.

Team leadership should encourage attention to process and practice, rather than people, during this debrief. A given is that no plan and process can anticipate or address every aspect of a crisis. Debrief sessions and documentation help incorporate appropriate learnings from a drill or actual event to improve the process.

STEP 5 REFINING THE PLAN

The true value of testing crisis preparation in a tabletop setting is seeing gaps, conflicting activities and opportunities to streamline and simplify the process. This allows the team to make continuous improvements based on increasing exposure to the plan in non-crisis situations. It also recognizes that no organization is static: business activities are added, deleted or modified regularly, and with these changes can come changes in the types and amounts of risk for which action planning is required.

Additionally, changes in the action plan are important when the people responsible for informing and/or implementing the crisis management and communications program change through team departures, new hires and promotions.

Ideally, the plan should be periodically reviewed against the full set of steps followed during its initial development. This less frequent step in the total crisis preparation cycle – likely implemented on a three-year cycle or in conjunction with the broader corporate planning cycle – serves as a high-level reality check that the plan remains aligned with strategic organizational goals.

CRISIS MANAGEMENT PLANNING MYTHS

Several misperceptions exist about crisis management and communication planning. However, awareness and accurate information can lead to a more efficient and effective process.

MYTH #1: CRISIS MANAGEMENT AND COMMUNICATION PLANS MUST BE LENGTHY AND COMPLEX.

Operating in a live crisis situation is an assault on all of the response team's senses. For the vast majority of organizations, having a well-known and internalized culture provides the high-order true north for managing the event. A one- to three-page critical actions checklist that ultimately covers the first 24- to 48-hours, supported by an appendix of templated

documents and other resources, generally sets broad boundaries in which the team is able to operate. No matter the length, a plan cannot anticipate the unique situations that differ from crisis to crisis. It is far more effective to keep it to a core that enables sharp thinking on the fly.

MYTH #2: IN AN ACTUAL CRISIS, ANSWERS MUST BE PROVIDED EARLY ON AS TO WHAT HAPPENED AND WHY.

In the initial stages of a crisis, safeguarding people and assets essentially are the only things that matter. Attempting to gather and process data to help explain why something happened is almost always a lower priority. Additionally,

outside investigations often become a part of the full crisis process, making initial speculation a risky proposition that could impact perceptions of credibility and competence.

MYTH #3: CRISES ARE UNAVOIDABLE.

There is a difference between unavoidable and preventable events. While steps can be taken to lessen the likelihood of a crisis trigger to occur, avoiding all triggering events is humanly

impossible. Conversely, following best practices for operation, inspection, maintenance and training often can, in fact, prevent crisis-triggering events from occurring.

SAFEGUARD YOUR ORGANIZATION

Successful crisis management and communication isn't about creating process, people and practices in a single sitting, nor is it luck or randomness. It is about skill and intentionality, focused on avoiding, mitigating or managing a critical business disruption.

Most importantly, it is about setting, articulating and consistently applying a culture of crisis prevention, preparation and performance.

While not every organization prioritizes crisis management and communication, all have the opportunity to create a culture, process and materials that will rapidly accelerate and improve performance during the challenging times of a crisis. Preparation can seem daunting, but it is critical to the organization's long-term viability and protection. If you need assistance creating or conducting a major revision to your crisis management and communications playbook, you may want to engage a professional services firm. Our agency, Three Box Strategic Communications, is one that can help.

Executive leadership, commitment to culture, practical risk analysis, developed methods and materials, testing and a refined process for the crisis management and communication platform is a sequence for success.



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