

Complete Crisis Management Guide and Free Template



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In this e-guide:

This guide to crisis management and free template can help your business respond to an unplanned emergency, such as the current COVID-19 pandemic.

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▶ Complete crisis management guide and free template

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Few times in recent memory have underscored the need for smart crisis management planning and management. Currently the United States and much of the world is in the midst of the destructive COVID-19 pandemic, and organizations of all types and sizes are dealing with the new reality. Many businesses have closed their doors, unable to sustain operations and pay employees. Supply chains are in varying degrees of disarray. Social distancing, working from home and increased cleanliness are the new norms. This is an international crisis of epic proportions.

At this point, your organization is probably well into its crisis management activities; however, the following preliminary steps are key to successful operations:

1. Ensure that your employees are safe and are practicing social distancing and good health habits.
2. Ensure that [employees can work remotely](#) or safely on site.
3. Establish communication protocols among employees -- e.g., regular team conference calls, status calls or management briefings -- to ensure their productivity is maintained.
4. Ensure that your organization's fundamental business processes are protected.
5. Begin planning for when your organization can resume normal operations.

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In this guide, we will provide guidance on crisis management, including pre-event planning, managing the crisis and post-event activities. We'll examine the various types of crisis management, how to create a crisis management plan, how to manage your business through a crisis and how to strengthen your business based on lessons learned from the crisis. In addition to many other relevant articles, we also provide a free downloadable [crisis management plan template](#) and checklist to help aid your planning and response.

The importance of crisis management

The current COVID-19 pandemic has provided all of us with an all-too-real lesson in the importance of crisis management. Across the world, businesses are in varying stages of their response. Even organizations with traditional business continuity and disaster recovery plans are struggling with the unique challenges a global pandemic presents.

Without a plan and clear leadership from company executives, a business cannot continue to operate in a time of crisis. Crisis management involves taking the steps necessary to sustain the business, protect employees and ultimately recover and resume normal operations. Although some businesses will fail, an organization's [crisis management response](#) aims to minimize the long-term effects to the organization and its employees until the crisis resolves.

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Incident management vs. crisis management

Often these two terms are interchanged, but they are different.

Incident management refers to activities that must be performed at the initial occurrence of an event to assess the problem and determine the initial steps to respond.

Crisis management activities are initiated if it becomes clear to company management and first responders that the event is likely to persist over an extended time. Whereas incident management might last only a few hours to perhaps a day, crisis management can extend to days, weeks, months and even longer.

A crisis management plan provides a broad range of guidance addressing staffing, resources, facilities, business operations management, employee health and safety, coordination of resources and -- perhaps most importantly -- communications. A [crisis communications plan](#) is essential to keep business leaders, employees, government agencies and the public aware of how the business is responding to an emergency.

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Types of crisis management

There are two basic types of crisis management: responsive and proactive.

A **responsive** crisis management plan (CMP) goes into practice once the event has occurred and after it becomes apparent that the event will not be mitigated quickly and could continue for days, weeks or months.

By contrast, a **proactive** CMP attempts to anticipate the resources that a business will likely need if a future event occurs and gathers them in secure locations. A proactive CMP can be initiated in the aftermath of a crisis to take advantage of lessons learned from the previous crisis.

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CRISIS COMMUNICATIONS HUB



SOURCE: READ/GOV FEDERAL EMERGENCY MANAGEMENT AGENCY (FEMA)

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Tips on creating a crisis management plan

Remember that a CMP deals with ongoing activities to keep the business functional, employees productive and safe and making arrangements to return to normal business operations when appropriate. So long as major business activities and employee safety are being addressed, company management and crisis management teams can begin preparation for business resumption, as well as responding to unplanned events that might occur during the crisis.

Like any emergency-based plan, CMPs should be based on a formal structure.

Organizations like the Federal Emergency Management Agency offer additional tools and guidance for preparing CMPs. In the following list, we'll detail several [key elements of a crisis management plan](#) that you can use as a guide to create your own CMP.

1. **Introduction, policy and organization.** Specify the purpose, scope, goals and objectives of the plan. Identify any regulations or statutes that govern the plan - e.g., FEMA, Occupational Safety and Health Administration or local code. List who will have hard copies of the plan and who will have access to the plan electronically. Include a schedule of plan dates -- e.g., creation, revisions -- and management approvals and authorizations.
2. **Crisis management strategy.** Define the overall approach to managing the crisis. Will staff remain at the office, relocate, work from home or be quarantined? Identify alternate resources and succession plans. Define CMP team roles and responsibilities during an event -- e.g., evacuate people, provide

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first aid and [coordinate remote work](#). Provide detailed lines of authority and criteria for responding to specific events.

3. **Communications.** Create an [emergency communications plan](#). Define who will be contacted during the crisis, and in what sequence and frequency. Include a detailed contact list with all methods of reaching team members, key vendors, law enforcement, first responders, healthcare organizations and government agencies. Ensure that roles and responsibilities are delineated in the contact lists. Deploy communication technologies, such as video conferencing software, to ensure employees can keep in touch with their managers and team members.
4. **Media management.** Contact with stakeholders, vendors, supply chain members and many others will be essential to keep the business running. Establish guidelines for managing the media during and after the event. Prepare statements for delivery to the media, identify primary and alternate media contacts, set up a meeting place for media briefings and train employees on how to interact with the media. Similar preparation must be made for managing employee use of social media during the crisis.
5. **Crisis procedures.** Once the event has occurred, and company leadership determines it will be a longer-term event, members of the crisis team should convene, review event assessments and determine the initial steps for managing how the company operates. Response steps and procedures will differ for a hurricane than for a flu outbreak. Schedule regular meetings with crisis teams to assess progress. Communicate crisis status regularly to employees, stakeholders and the media as appropriate. Define steps to follow if additional events occur that are triggered by the initial event. Prepare an after-action report describing what worked, what didn't work and lessons learned. Prepare procedures and instructions that are logical, easy to understand and perform as intended.

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6. **Connection to other emergency plans.** Define connections between the CMP and other plans, such as business continuity plans, [crisis management playbooks](#), cybersecurity plans, disaster recovery plans, fire emergency plans and severe weather plans.
7. **Awareness and training.** Develop and conduct training programs for crisis team members. Create an awareness program to keep employees and stakeholders aware of the CMP and its associated activities.
8. **Exercises.** Schedule and conduct periodic exercises of the CMP, ranging from tabletop exercises to full, active simulations involving scenarios and activation of the crisis team and other third-party organizations. Update the CMP based on results of the exercises.
9. **Plan review, audit and maintenance.** Establish a program to review and update the plan at least annually or more frequently as needed. Create a schedule of activities during a calendar year -- e.g., plan exercises, plan reviews, management reviews and training activities.
10. **Glossary.** Provide a list of appropriate terms, definitions, abbreviations and acronyms.
11. **Appendices.** Add appendices that are relevant and support the CMP, such as forms, checklists and contact lists.

How to manage a crisis

The actions company leadership must take will evolve along with the crisis. Let's examine common crisis management activities by phase of the event: pre-crisis, during the crisis and post-crisis.

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Pre-crisis

Prepare plans. This includes securing a commitment from management and budgeting for a CMP activity. Review previous crises, prepare policies, examine standards and regulations. Review resources from FEMA and other government agencies.

Build a crisis management playbook

So you've experienced a catastrophe—what now? Reference a playbook for procedures and communication guidelines to reach resolution quickly. And keep a hard copy on hand.



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Form a crisis management team. Use guidelines and support from appropriate crisis organizations to select team members. Define [crisis management team roles and duties](#), arrange training and schedule periodic exercises to ensure team members are prepared to perform their roles.

Identify weaknesses. In the course of initial planning and research, identify potential weaknesses in existing emergency plans, crisis plans or other emergency response activities that might affect employees and the business during a crisis.

Write a strategic crisis management plan. Prepare CMP procedures and the supporting document based on best practices, [FEMA and other agency guidelines](#). Prepare the CMP so that it can be adapted to a variety of situations, while ensuring employee health and safety, along with the continuation of business activities.

Train employees. Prepare and deliver training to employees on potential crisis situations, how the company plans to respond and employee responsibilities during a crisis.

During the crisis

Crisis communications. Ensure that employees, management and external entities, including the media, are regularly informed on crisis status. Ensure that employees can communicate and perform their duties wherever they are located.

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Business operation resources. Regularly review the status of supply chains to ensure that resources the company needs are being manufactured and supplied. Consider identifying alternate resource channels.

Employee well-being. Employee health is a primary issue. Ensure that employees are informed of the activities and precautions they must perform to ensure their health is maintained.

Financial considerations. Work with banks and other company financial institutions to ensure there will be no loan defaults, delays in paying rent, loss of cash or inability to pay employees and vendors.

Mid-course corrections. Regularly have the crisis team meet and discuss how to respond to new situations that might evolve into more serious problems (e.g., an emerging severe storm that could damage company facilities).

Management reporting. Regularly brief senior management on progress -- or lack of progress -- during the crisis. Brief local, state and federal government agencies, regulatory agencies and other organizations of any changes to company status.

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Stages of crisis management



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Post-crisis

Recovery and resumption. Coordinate with other emergency teams to facilitate procedures needed to return to business as usual.

Evaluation of successes and failures. Conduct meetings to evaluate how well the company handled the crisis. Evaluate the effectiveness of the CMP and the crisis team. Identify opportunities for improvement and prepare a post-mortem report to management.

Management reporting. Keeping employees and management informed during a crisis is an essential activity. Once the crisis is over and the company has resumed operations, brief senior management and employees on the key findings and recommendations of the post-mortem report.

Times of crisis challenge every organization. The survival and long-term success of your business depends on how well it responds in these difficult times. Use our crisis management plan template to kickstart your planning.

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