

When all hell breaks loose

A crisis plan in seven steps

Crisis Plan

Our Agenda

General Approach to Crisis Planning

Seven Steps for Crisis Planning

- 1. Internal Audit**
- 2. Risk Assessment**
- 3. Plan Development**
- 4. Training**
- 5. Testing**
- 6. Revisions**
- 7. Regular Updates**

**The Only Thing
That Matters**

General Approach to Crisis Planning

Discover

What exists? What's missing?

Assess

Where are you vulnerable?

Create

Keep what works. Refine the rest.

Internal Audit:

What you have and what you don't

Existing Plans

Established Protocols

Staff and Skillsets

Strengths and Weaknesses

Organizational Structure and Culture

Past Crisis Experience

What to Plan For

Risk Assessment

Identify Risks/Threats

Assess Likelihood

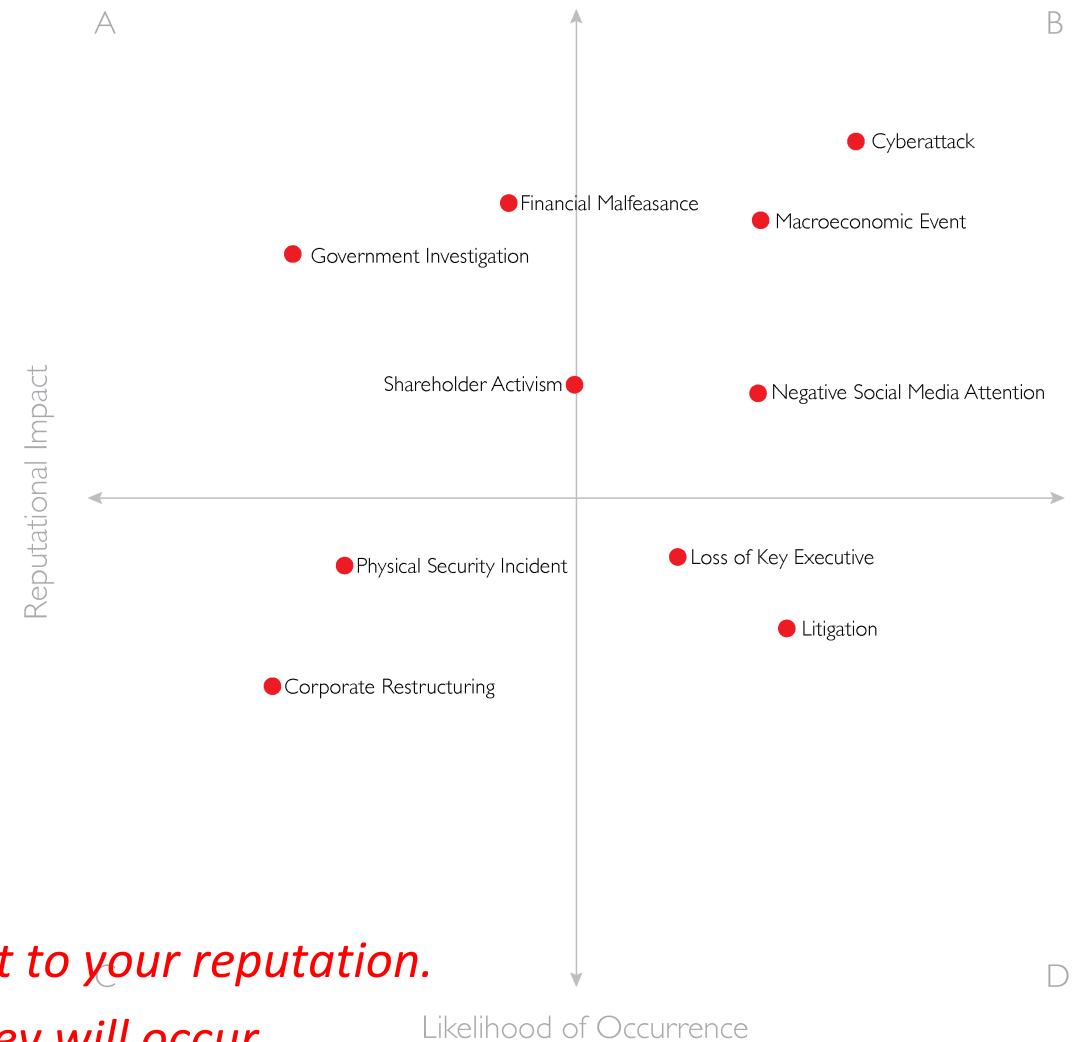
Evaluate Potential Impact

Exercise

List 10 issues that could impact your organization.

Rank those issues according to their potential impact to your reputation.

Now rank those issues according to the likelihood they will occur.



Plan Development: Top Ten

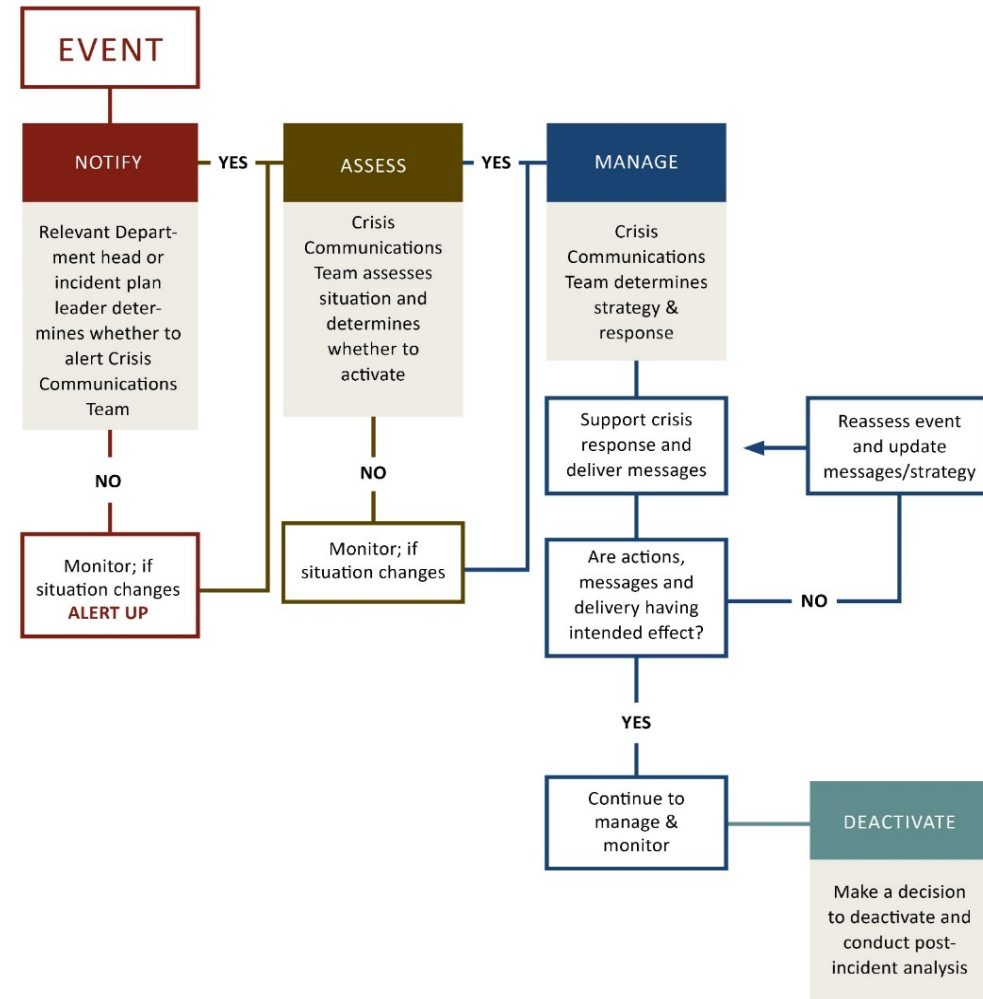
1. Clear Internal and External Notification and Escalation Protocols
2. Tools to Assess Potential Impact
3. Strategic Team Composition
4. Defined Roles and Responsibilities
5. Clear Communications Protocols
6. Identified Spokesperson
7. Effective Message Development
8. Scenario Planning
9. Process for Deactivation
10. Template for Post-Incident Analysis

1. Clear Internal and External Notification and Escalation Protocols

Who Will Learn?

How Will They Learn?

What Should They Do?



2. Tools to Assess Potential Impact

	SITUATION CHARACTERISTICS	STRATEGIC CONSIDERATIONS
LOW		
MODERATE		
HIGH		

Exercise

When will you be reactive and when will you be proactive?

What does it take for your organization to respond to an issue publicly?

3. Strategic Team Composition

4. Defined Roles and Responsibilities

TEAM LEADER	CONTENT MANAGER	INTERNAL COMMS MANAGER
<p>DESCRIPTION</p> <ul style="list-style-type: none"> • Serves as primary point of contact and executive oversight between the Team and the Board • Elevates certain decisions to the Board (if/when necessary) • Considers potential variables that may arise in the future that could force the team to re-evaluate communications strategy • Assigns tasks to Team as needed • Determines top communications-related goals and strategies and ensures these are consistent with corporate values • Approves all communications, with direction from the Board and Legal 	<p>DESCRIPTION</p> <ul style="list-style-type: none"> • Writes initial messages and statements and submits for approval • Solicits input from relevant subject matter experts • Ensures consistent messages in all communications • Develops and manages content approval chain (ultimate approval lies with Team Leader, but depending on the situation, legal counsel or others may need to be involved) • Continues to refine messaging: talking points, statements, news release(s), fact sheets, and Q&As • Ensures messaging is delivered to the Team leader and approved in a timely manner 	<p>DESCRIPTION</p> <ul style="list-style-type: none"> • Coordinates internal messaging with external messaging • Communicates with employees throughout the event as appropriate • Supports communications cascade to frontline employees • Receives and tracks internal inquiries during an incident • Responds to inquiries based on direction from the Team Leader



- 5. Clear Communications Protocols
- 6. Identified Spokesperson
- 7. Effective Message Development

STAKEHOLDER	CONCERN	CHANNELS	ASSETS	OWNER	SPOKESPERSON
Regulators					
Employees					



8. Scenario Planning

Informed by Risk Assessment

Lives as an Appendix

Strategic Considerations > Drafted Content

Example: Data Breach Plan

Many organizations have a separate data security plan

Strategic Considerations:

- Know the data you (and your third-party vendors) hold*
- Be lock-step with IT and don't get ahead of an investigation*
- Have cyber-specific outside counsel/forensics/communications on speed-dial*
- Prioritize secondary communications methods – internal and external*

9. Process for Deactivation

10. Template for Post-Incident Analysis

Issue Summary and Approach	[Summarize investigation findings, strategic direction, and actions taken]
What Went Right	[Summarize approaches that enabled organization to succeed]
Areas for Communications Improvement	[Summarize challenges faced and suggest improvements]
Main Contacts AND Other notes	[Provide contact information for questions and future input]



Training and Testing



Skills Training

Media Coaching
Crisis Best Practices
Incident Management



Tabletop Exercise

Roles & Responsibilities
Training
Hypotheticals
Lessons Learned



Crisis Simulation

“Live Fire” interjections
“Curve balls”
After action

Revisions and Regular Updates

Update based on Feedback During Training

Incorporate Learnings following Exercises

Revise based on Crisis Response

Page-by-page Review (No Less than Annually)

Questions?