Most of us turn to MapQuest or Google Maps for directions to reach our desired destinations. Do you have such a resource to get you through a sudden or smoldering crisis?

Every organization—business or nonprofit—should have three crisis plans:

1. **A crisis operations plan:** what you do when someone pulls the fire alarm, a tornado strikes, fire erupts, an explosion rips through your facility or a neighboring facility, or word spreads through the plant or office that there’s a man with a gun.

2. **A crisis communication plan:** what should be said, who should say it, when it should be said and how it should be said when a crisis strikes.

3. **A crisis continuity or recovery plan:** how to recover and restore operations and get back to business.

In the best of all worlds, every organization will have these three plans, and they will be integrated into one plan to mitigate the damage of any crisis or emergency and to advance the overall objectives of the organization.

Since the Institute for Crisis Management was created in 1990, we have only seen one truly integrated crisis operations, communication and recovery plan, and it was a thing of beauty and effectiveness. It was the product of some wise and forward-looking executives with Marathon Oil, one of the major oil companies in the U.S.

The following is an example of how it was put to good use:

On a cold Friday afternoon in January 2000, a 24-inch diameter pipe carrying crude oil to a refinery in Catlettsburg, Kentucky, ruptured, spilling about 489,000 gallons of crude oil into a private golf course, surrounding farmland and Twomile Creek near Winchester, Kentucky, before safety valves were closed and the flow of leaking crude oil was stopped.

Within hours, company crisis team members began arriving at the site in eastern Kentucky. The assessment of damages and identification of what had to be done was completed before dark.

By daybreak a convoy of trucks pulling relocatable office trailers had arrived, and while those trailers were being set on blocks, telephone and electric utility crews were dropping lines from nearby poles to provide power and communication for the crisis team members who would be working on-site for an extended period of time. One trailer provided an office for the incident
commander and a conference room for the crisis team to meet in. Another trailer provided work space for accounting and legal representatives; the company wrote checks and paid bills as they went, from the incident site. Another trailer housed public relations, community relations and public affairs staff, and there was work space for a site security manager in another.

Simultaneously, another convoy arrived with huge pumps and empty tanker trucks. A semi-truck arrived, and the driver began unloading cartons of disposable diapers. The incident commander explained that the pumps would be used to suck up as much crude oil as possible, which would be hauled away in the tanker trucks. He would then hire local day laborers and send them into the damaged areas with bags and boxes of diapers to soak up as much of the remaining crude oil as possible. Those bags of oil-soaked diapers would be shipped to an approved hazardous material landfill. After that was done, heavy equipment would arrive and scrape and haul away any remaining contaminated soil before truckloads of new top soil would arrive to restore all the contaminated countryside to its original contours and make it even better farmland than it was before the spill. This remediation portion of the crisis plan took about six months.

The first TV crews arrived that evening. The team had scouted out a site on a county road that was safe for news vehicles to stop along and had given them a view of the rupture site, without giving them access to the private property it was on. A spokesperson was ready to accompany each reporter to the viewing/interview site as soon as they arrived.

Within 48 hours, representatives of the oil company and lawyers began knocking on doors of the adjoining farms and began negotiations for settlements, without waiting to be sued. Seven of the property owners reached settlements within days, and the eighth farmer had his agreements within a few more days. The company proposed cleaning up all contaminated land on each farm, making it more productive than it had probably been in years, plus additional compensation to offset any losses before the fields could be planted or grazed again.

By the third day, the company had arranged to use a nearby school facility to hold a town hall meeting, which the surrounding community was invited to attend. Crisis team leaders and other company representatives explained what had happened, what they were doing about it and the timetable for the cleanup. They were straightforward and clear in their opening remarks, and then took questions from the audience of more than 100 area residents. They answered all the questions and controlled the flow of the discussion, which was over in an hour and a half.

Reporters from various area newspapers and TV stations came to the site at least once a day for the first three days and never left complaining that they didn’t get their questions answered. They could not find residents of the area bad-mouthing the company or complaining they did not know what was going on. By the fourth day, there was no need to come back, because the cleanup was progressing as promised and there was no “conflict” for reporters to uncover.

Company spokespeople collected contact information from each reporter who had been to the scene and when they quit coming back, they were called every few days to make sure they did not have any unanswered questions.
The office trailer supplier, the pumper trucks and tanker trucks operator, the diaper distributor, and even local legal counsel were all identified in the company’s integrated crisis plan, with multiple vendors identified along the pipeline and 24-hour contact information for each.

The plan called for comprehensive documentation of everything the crisis team did, and there was always a “documenter” with a legal pad and pencil in hand close to the incident commander, taking notes about what was being discussed, when and what decisions were made, who made them, and who was assigned to execute each action. The documenters worked in two-hour shifts. After two hours of note-taking, a new documenter would step in, and the previous one would go to the trailer office and transcribe his/her notes.

The operational part of the crisis plan began with the monitoring system that alerted company officials that the pipeline had ruptured and oil was leaking. The plan then spelled out the steps to shut the pipeline down and begin the operation to contain the damage, check public safety and health, and initiate the communication and recovery elements of the plan.

Trained spokespeople and media coordinators were on the scene quickly, and began dealing with the media and helping prepare crisis team leaders and other company officials to deal with all the key audiences that were affected.

The continuity plan included all the steps to repair and restore the flow of oil, and the recovery part of the plan dealt with the cleanup and remediation.

Environmental Protection Agency fines were minimal, and no lawsuits were filed against the company, so the US$7.1 million cost of responding to the incident was relatively small, compared to what it could have been without a plan and people trained and ready to implement it.

Crisis operations, communication and recovery plans must be tailored to fit each organization and must accommodate unique vulnerabilities, structures, personnel, facilities and sizes. Each should be integrated with the other and cross-referenced. Integrating the plans helps operations personnel who clean up a chemical spill to know what information they are expected to share with the communication department and vice versa. Communication staff have a reasonable idea of the procedures the operations personnel are using to contain and clean up the chemical spill as well as the needs of employees and vendors to get the organization up and running again. Operations knows how communication will use that information to inform employees, customers, vendors, suppliers, investors, government officials and the media. The actions or statements of other units should come as no surprise to any unit involved in managing a crisis.

This chapter describes a generic crisis communication plan that can be tailored to fit the needs of your organization. Two illustrative examples of a crisis plan appear in this manual: Appendix A presents a generic plan based upon the description that follows, and Appendix B contains the United States Automobile Association (USAA) crisis plan, which won an IABC Gold Quill Award.
This approach helps simplify the task by focusing on 12 elements, clustered into three parts:

1. Overview of crisis communication planning
2. Crisis team composition and responsibilities and communication guidelines
3. Letters of agreement, checklists and forms

OVERVIEW OF CRISIS COMMUNICATION PLANNING / The first part of the plan includes a statement of purpose, defines crisis terms, identifies major categories of crises expected by the organization, features a letter from the most senior executive underscoring the importance of the document, and establishes the crisis communication team.

1. Message from the top
   The main obstacle to effective crisis preparation is management denial. When management supports and encourages crisis planning, while reminding employees and other stakeholders of the importance of maintaining the organization, it sends a clear message that crisis planning is important and the written plan is part of the organization’s preparation. In other words, that the organization has made a commitment to crisis planning.

   The management message often takes the form of a letter signed by one or more members of top management. Whatever form you consider appropriate for this message, it should be addressed to all employees, stressing the importance of preparing for the worst while reinforcing the intent of the organization to do its very best when responding to any crisis. The message might also emphasize:

   - The importance of each employee’s performance during a crisis.
   - The need for everyone to understand the plan and their place within it.
   - The expectation of full cooperation in the training sessions and simulations necessary to make the plan work.

2. Overview of the Crisis
   The overview describes how the plan equips the organization’s leadership with the resources to effectively manage a crisis by mitigating damage and advancing the overall objectives of the organization. It should outline overall responsibility and define roles and responsibilities at headquarters and all other facilities, outposts and offices.

   The overview should also spell out the fundamental principles on which the plan is built. The USAA case study that appears in Appendix B contains an example of a statement of fundamental principles and includes the description of principles in two units: “Crisis Communication Policy Statement” and “Crisis Communication Plan.”
As described in the first chapter, crises can be divided into four major types:

1. **Sudden**: A sudden crisis is an unexpected disruption of the company’s business or the organization’s operations, including such incidents as fires, explosions, natural disasters or workplace violence.

2. **Smoldering**: A smoldering crisis begins as a relatively small problem or issue, usually internally. If management is paying attention, the issue will be spotted and corrected or averted before it develops into a public crisis. When a crisis cannot be avoided, at least the damage can be minimized through proper preparation.

3. **Perceptual**: Perceptual crises are situations in which there is no problem, or a relatively insignificant problem, but people believe otherwise.

4. **Bizarre**: Bizarre crises are those so extreme that the event is almost unbelievable.

The plan should include a brief explanation of the major types of crises the organization can expect to deal with, as discovered through the vulnerability study. Included in the description of the various crises should be differences between sudden and smoldering crises and a classification system for both sudden and smoldering crises (the first chapter distinguished four levels for both types of crises). The unlikely and peculiar nature of perceptual and bizarre crises makes specific preparation difficult. However, once they’ve occurred, much of what you do and say in response will be similar to what you do and say in responding to sudden or smoldering crises.

The USAA case study in Appendix B identifies the crises it expects to affect its facilities, management and employees.

**CRISIS COMMUNICATION TEAM AND RESPONSIBILITIES** / The second part of the plan contains four subsections describing:

1. The crisis communication team.
2. Responsibilities of line and staff personnel.
3. Spokespeople and disclosure guidelines governing what they may say.
4. Procedures for verifying information and gaining approval for release of information.
3. Crisis Response Team, Duties and Chain of Command

The members of the communication team, their alternates and their responsibilities should be clearly defined in the crisis communication plan. Team leadership is best kept relatively small—three or four people—with a designated backup person for each team leader. As a member of the overall crisis response team, the communication coordinator serves as the principal communication adviser for the overall crisis team manager. The crisis manager, or the backup person, is the person responsible for directing your organization’s response to the crisis.

The crisis response team may include representatives from corporate or headquarters communication, local facilities communication, marketing, legal, operations, human resources, investor relations, government relations, information services, risk management, continuity planning and security. The whole team will likely never be activated at one time. Only those members with the skills and knowledge necessary to manage a specific crisis should be activated. For example, an international telecommunications corporation maintains a fleet of corporate aircraft. If one of those planes goes down, the manager of aviation should be on the team. If that same company suffers a severe drop in stock price, the CFO should be on the crisis team while the manager of aviation remains at the airport. If the crisis expands in either nature or scope, additional team members can be called in as their expertise is needed, as in the USAA plan.

Constant on the team should be a member of the communication staff and a good lawyer.

COMMUNICATION TEAM DUTIES AND CHAIN OF COMMAND

The members of the communication team and their responsibilities, as well as the backup members, should be clearly identified in the plan. The communication team should include a leader, a deputy leader, someone focused on internal communication and someone to deal with the public media, and another team member to coordinate Internet and intranet communication.

The plan should make clear who is required to review and approve internal and external communication. Those responsible for approving crisis communication should understand the importance of speedy and careful review and prompt approval to facilitate timely communication with employee and management audiences as well as with shareholders, customers, vendors, suppliers, investors and the general public.

There will usually be a crisis operations team leader or incident commander and a crisis communication coordinator or team leader. The following chart shows the relationship of the various crisis team leaders to top management and support services.
A classification system allows an organization to assign different levels of response, depending on the severity of the crisis. For example, in sudden crises, you can have up to four levels of a crisis, beginning with the least damaging. You might call the first degree Level 1, and its definition might be a crisis that requires the existing staff to respond to something out of the ordinary. This level of crisis can be handled by the people on duty and will not draw any outside attention from the media or other stakeholders. A Level 1 crisis usually doesn’t require an immediate communication or crisis team response, although both teams should be notified as a matter of normal reporting.

A Level 3 or 4 crisis requires outside assistance, such as police, fire or other emergency services, and will draw attention from neighbors, customers, competitors and the media. Immediate notification of the crisis team is mandatory.
NOTIFYING THE CRISIS COMMUNICATION TEAM

The full crisis communication team, including backups designated for each primary team member, should be listed with every possible phone number and other means of communication. Each team member should be listed with office, home, fax, mobile and pager phone numbers, and possibly a physical address. If the team member has a second home or weekend getaway cabin, that number should be listed as well. E-mail addresses (and alternatives) should be included with each team member’s name.

Those lists should be updated regularly. Quarterly is best, but semiannually will do. Personnel turnover, internal promotions and job reassignments can render a plan almost useless. The plan should document who is currently responsible for each crisis team task and all the up-to-date access numbers for each team member.

The crisis communication team should be adaptable and able to include people with good knowledge of the area in which the crisis occurs. For example, if a senior officer dies, an executive assistant or human resources person might be assigned to the team. If a fire or explosion occurs in a production area, a person from the plant manager’s office or a line supervisor familiar with the production process might serve. If workplace violence breaks out, a member of the organization’s safety and security staff might have to be on the crisis communication team.

People with firsthand knowledge of the specific crisis, its processes, and its languages can advise and explain details to the crisis communication team, helping them to more thoroughly and clearly communicate with the various audiences.

4. Line and Staff Responsibilities

Other employees with communication skills will be needed to play important roles during a crisis. They can be given specific assignments that will help to relieve the pressure on the crisis communication team during the initial stages of a sudden crisis. They can also play an essential role in answering the deluge of calls and logging the names and phone numbers of callers (refer to Appendix A, Addendum K: Crisis Activity Log). Whenever a statement has been released to the public, they also can be instructed to read the copy in response to questions, e.g., “We can confirm at this time…”

Other employees can be assigned to compile background information on employees who might be affected or involved. They can also monitor the media and summarize the substance of the crisis coverage for the communication center.

It can be helpful to assign people to line up food and drink for the crisis teams and the media gathered at a media center.
5. Designated Spokesperson and Information Disclosure Guidelines

Any members of the crisis communication team serving as designated spokespeople should be briefed immediately on the latest information that has been confirmed. The briefing should include important details, but only those that have been verified (see Appendix A, Addendum G: Media Briefing Tips for Spokespeople). The CEO or top manager in an organization should not necessarily be the ongoing, designated spokesperson. This will be covered more thoroughly in Chapter 5.

THE ROLE OF SENIOR MANAGEMENT

The CEO or most senior manager has two significant roles to play early in the crisis: (1) to make an appearance, however brief and (2) to keep the organization focused on its mission—that is, to keep the organization functioning. At the very least, the CEO/most senior manager should be quoted in an information (or press) release, expressing personal and company sympathy for victims and their families, support for affected employees and other stakeholders, and a pledge to cooperate with and assist whatever investigating authorities are involved and get the organization operating as quickly and efficiently as possible. The CEO then can turn over the ongoing spokesperson’s role to a competent and well-qualified person who is identified in advance and designated in the plan to handle that duty in specific crises.

Top management remains the leader of the organization, connected to the crisis communication and crisis operation teams but not engaged in the minute-to-minute functioning of those teams. Management needs to keep its focus on the functioning of the organization: repairing what needs to be repaired and returning to the routine of producing its goods/services. Returning an organization to its “routine” performs a therapeutic as well as an operational function. In crisis after crisis, we have witnessed people wanting to “get to work,” meaning to get back to a routine that organizes their lives, that gives them purpose and, yes, income.

Often, the top PR or communication manager will not be the designated spokesperson, but instead will be responsible for managing the communication and preparing the spokesperson. Even when there is a designated spokesperson, the communication chief will still do a lot of media briefing and probably also interviews.

DISCLOSURE GUIDELINES

Guidelines for what can/should be said during a crisis should be reviewed and adapted by the communication team leader and his/her staff, working with legal counsel. The crisis plan should include guidelines for what can be said under what conditions. In the U.S., requirements of the Freedom of Information Act may conflict with the Family Right to Privacy Act regarding the release of information about employees and volunteers. Other countries will have their own rules, regulations or laws that will apply in a crisis, and the crisis plan should be modified accordingly to take account of these.

The media want to receive the most accurate information, but fulfilling that responsibility should not endanger, expose, frighten, or add to the grief of individuals and families. One basic disclosure
Another guideline is *never reveal the name of an injured, dead or missing employee until the next of kin has been notified.*

Another guideline is *never deny the obvious.* Facing a television camera after two live reports of an explosion with a fatality at a packaging plant, the safety manager said in a monotone with a straight face: “The comment we have at this time is that we will have no comment until tomorrow.” By the next morning the company had no credibility with the news media, employees, community, state and local elected officials, and state and federal investigatory and regulatory agencies.

Other guidelines for disclosure might be:

- Don't reveal any personal information about your people other than name, job status and dates of employment.
- Don't discuss any previous crises suffered by the organization unless the information is already a public record.

Those guidelines should be worked out in advance, agreed to by all levels of management and included in the crisis communication plan.

**THE MOST IMPORTANT PART: WHAT TO DO, WHAT TO SAY**

The heart of a crisis communication plan is the part that includes preapproved strategies, priorities and messages for the most likely kinds of crises your organization will face. After conducting a vulnerability study and reviewing the kinds of crises your peers have experienced, you will be able to identify six to 12 broad crisis categories.

Each of those broad categories will include a general description of the kinds of things this part of the plan covers, followed by such elements as the organization's communication priority (employees, families, customers, shareholders, investors, regulators, etc.).

Once priorities are set, the plan then spells out what can and should be done to communicate with each specific audience, and in some cases what *not* to say. This part of the plan often includes message points already approved by senior management and the lawyers so that when needed, the communication team can quickly pick the appropriate response and need not wait for a committee to approve it.

For example, in a typical section titled “Aggression against the corporation: Including workplace violence, bomb threats, kidnapping, hold-ups, hostage taking, etc.,” you will find an approved message that simply expresses the organization's sympathy for any victim(s) and pledges the company's/organization's cooperation with investigating authorities.

Depending on the nature of your business, other broad crisis categories included in your crisis plan might be:
Before the Crisis Hits—Building a Crisis Communication Plan

- Death or incapacity of a senior executive.
- A seriously negative news story.
- A labor problem or work stoppage.
- Accidents and natural disasters.
- A legal or ethical problem.

If you are in the food service industry, you will also want a section dealing with “Food quality, including product tampering, contamination, food-borne illness, and other health and safety issues.” Health care plans might contain a section on “Medical errors by physicians and other caregivers.”

Each crisis category section should also include a paragraph or two describing how the Internet and intranet can be used to manage the crisis and distribute information to various audiences. Instructions should be spelled out to monitor the Web and watch for what is being said and reported about the organization online. This is just as important as clipping newspaper articles and getting taped recordings of television and radio news coverage (see Chapter 6: Crisis Communication Technologies, page 101).

6. Information Verification and Approval Procedures

Procedures for verifying information and the authority to distribute that verified information should also be covered in the plan. When a crisis hits, the people who must represent the organization to its stakeholders should not be deterred from speaking because their messages are awaiting management approval.

The authorization process should be clearly defined and spelled out in the communication plan. In fact, the form and substance of the initial statement confirming a crisis can be designed and approved before a crisis. Basic message points for various types of crises can be developed and approved in advance for inclusion in the communication plan; e.g., if “a b c” happens, our spokesperson can say “x, y, z” (refer to Chapter 5: Communicating in the Midst of Chaos, for more information on message points and platform).

Guidelines for the organization’s advertising should be included in this section. If a crisis occurs, should the advertising be pulled? Changed? Left unchanged? The answers to these questions need to be agreed upon before the crisis occurs, and guidelines for the content and placement of ads relating to the crisis need to be included in the plan. Some companies already have advertising designed and ready to go to bypass newsroom gate-keepers with key messages in certain kinds of crises. These standby ads are included with the crisis communication plan.

The strategy will vary according to the nature of the crisis. If your CEO has been indicted for stock fraud, ads with the CEO pitching your products should be pulled. But rather than not advertise at all, you may need an alternative ad. The guidelines and directions for canceling the one ad and replacing it with an alternate should be included in the plan.
Recall the print and broadcast advertising following 9/11. Companies changed the substance of their ads to express sympathy for the families of the victims, to pledge financial and human support for the rescue and cleanup, or to affirm the organization’s belief in the strength of Americans’ spirit. A lot of the time-consuming scrambling that took place in the ad world in the first days following the plane crashes might have been reduced if crisis plans had made better provisions for the situation.

Some companies—for example, utility companies—could have special generic ads created for crises caused by major storms. If power fails during a hurricane or cyclone, tornado, severe thunder or hail storm, or blizzard, the utility could pull the ad praising its ability to provide power and replace it with one stating the commitment of its people to get service flowing again.

7. Approved Background Information, Video and Photos
Closely related to guidelines for the release of verified information are guidelines for the distribution of background information, prepared video clips and photographs. During a crisis, these items become more important to the media and other stakeholders (i.e., regulatory agencies, investment analysts) demanding information. Backgrounders and biographies with accompanying video and photos should be developed and maintained for regular use, and a set kept with the crisis materials. A second master set of handouts, videos and photos should be stored outside the office just in case the office and/or computer servers are inaccessible or damaged in the crisis.

LETTERS OF AGREEMENT, CHECKLISTS AND FORMS / The final, major part of the crisis plan contains a collection of information to help you operate more effectively once the crisis hits.

8. Letters of Agreement for Securing Needed People and Services
You will need extra people and services when a crisis hits, particularly if the crisis team cannot end the crisis quickly and it remains front-page news for several days.

Retired employees offer a pool of experienced, knowledgeable people to expand your communication staff. Additionally, you can identify and train staff from other departments in advance who can be loaned to the crisis communication team when a crisis erupts. Consider using qualified extra help to:

- Answer media inquiries, with the help of proper briefing and scripts.
- Escort media, law enforcement or regulators while they are within the facilities.
- Act as liaisons with other departments.
- Be representatives of the organization to families of those killed or injured.
Consider including the role of “anticipator” in your plan. The anticipator is not a decision maker, rather someone who can step back and look at the big picture and then attempt to map where a story might go, what reporters are going to want to know next, how the community will react, what employees are going to want to know, etc. USAA builds into its plan several of the functions of the “anticipator” role in the sections labeled “what the public wants to know” and “what the media will ask” (Appendix B). The anticipator can also monitor news coverage and point out problems, rumors, misinformation and media bias to the communication team leader. Former employees, particularly if experienced in communication or media, might fill this role.

Students can serve as general helpers or “gophers,” a role that’s necessary when everyone is working under extreme pressure. They can run errands, operate the copy and fax machines, deliver food and drink, assist media crews in the media center, etc.

*Letters of agreement* with retirees and local colleges can ensure the supply of additional help long before the crisis happens.

Along with extra people, additional services will be needed during a crisis. Letters of agreement with local providers should be included in the crisis plan, so that at any hour of the day, any day of the week, necessary services and equipment can be ordered and delivered quickly.

The following are examples of the types of services that can be prearranged with letters of agreement:

- A local phone company to divert phone service from the organization’s main office to a temporary crisis command center and bring additional phone lines into a temporary media center
- A local computer company to deliver laptops, printers and other necessary technology items
- A local office supply company to deliver tables, chairs, fax machine(s), portable copy machine(s), shredder(s), office supplies, trash bags and a case of tissue paper
- A nearby community center, school, motel or church to make space available for a crisis command center and/or media center when your own facilities are not useable, with access available 24 hours a day, on short notice
- A security service to provide personnel and property protection, and to control access to the crisis command center
- A caterer to supply food and beverages for crisis team members and the media
- An equipment company to deliver gas-powered generators to supply electric service if the public utility is unable to provide service
- Media monitoring services
- A law firm to provide crisis legal counsel, if you don’t have in-house legal counsel
- A supplier of mobile construction trailers and portable toilet services to provide temporary
facilities if you are located on a remote site, and there are no nearby alternate sites for a command center

- An electronic service to rent walkie-talkies for on-site communications and extra mobile phones, batteries and chargers to maintain outside communications

10. Checklists
The plan should contain checklists that can be printed and distributed as needed. A checklist becomes a quick, readable description of responsibility, a method to engage people in constructive, cooperative activity without much instruction or supervision. Examples of checklists and logs can be found in Appendix A (Addenda D, E, H, K and L). Additional checklists can be devised for:

- Crisis team call-out with phone numbers and priority calls.
- Notification/activation.
- Responsibilities of the first communication representative at a site.
- Lists and sources of information.
- Instructions for setting up a media information center.
- Corporate media policies and guidelines.
- A media interview preparation sheet.
- A crisis activity log.
- Contacts and phone numbers.

The contacts list should include the names, numbers and e-mail addresses of news organizations, regulators, legislators, community leaders, corporate officers, board members, emergency service public information officers, trade publications, and professional associations, among others.

11. Documentation Forms and Procedures
If the lawyers will let you, *document everything*. For example, Marathon Oil’s crisis plan includes a person designated the “documentarian.” This person follows the incident commander and notes each discussion and decision, and who made it, when, and how. Each day, the documentarian’s notes are transcribed and submitted to the legal department.

Be sure you know what your organization's lawyers will allow you to record. Everything that is written down is subject to discovery when the lawsuits hit after your crisis. Some documents may be protected by client-lawyer privilege, but not all documents may be exempt from the discovery process. Some countries are following the lead of those in North America and Western Europe in forcing more
rather than less disclosure by organizations. Wherever you work, be prepared to document everything you do and say.

If your legal counsel will allow it, the more documentation you have, the better you will be at managing the crisis and later determining what worked and what did not.

*Every phone should be provided with a log sheet* or similar form to record calls. Also make sure to log e-mail messages. Note whom you talked to, when, what organization they represent, and what you told them in brief. Before you call them back, check to see what you talked to them about the last time. The situation may have changed, and it’s useful to know what you may need to correct and whether you should explain why what you’re saying today is different from what you said yesterday.

It’s also a good idea to record (in both audio and video formats) interviews with reporters. Thorough documentation may provide witnesses in the post-crisis legal confrontations, and the documentation may help you identify people to thank for their help in accurately and quickly telling the story of the crisis and providing other support.

12. Procedures for Debriefing: Learning from the Crisis

If you’re going to the trouble of having a crisis, you ought to learn all you can from the experience. Include in the plan a section describing how, when and by whom a debriefing will occur (see Appendix A, Addendum J for suggested debriefing questions).

The “how” might be an off-site meeting with the only agenda item being an evaluation of the organization’s response to the crisis.

The “when” should be within two weeks of return to normal operations. Delay a month, and you risk losing important details as well as the cognitive restructuring of events. Two weeks permits people to return to work and begin to get over the trauma as well as to catch up on projects neglected during the crisis.

The “who” might be an outside consultant or a manager who was not directly involved in the crisis. Human resources professionals often have the skills to guide an evaluation.

After completing the debriefing interviews, follow evaluation of the overall performance with recommendations on what can be done to improve reaction to and management of a crisis in the future.
TWO FINAL THOUGHTS ABOUT CRISIS PLANS / First, every member of the crisis team should have three copies of the plan—one for the office; a smaller sized plan for the car, briefcase or purse; and one for home. Even if the plan is available on the intranet, hard copies should be available, including a disc or memory stick with the plan on it, with each printed hard copy. No matter when they’re notified or what the nature of the crisis, team members will have a copy of the plan within reach.

Second, practice the plan to make sure it works. Frequently, organizations spend considerable time and money developing operational and communication plans but never test them to (a) see if they work, (b) determine if they fit together, or (c) rehearse the people expected to make the plan work. U.S. football players will routinely say they need “repetitions” to recognize defense and coordinate offensive timing, because they know the more familiar they are with their roles, the more coordinated the team effort will be. The need for repetitions also applies to crisis plans and planning. Once the plan is created, exercise it. As personnel change, exercise it again.