

CRISIS MANAGEMENT PLAYBOOK TEMPLATE

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Crisis is inevitable for just about any type of organization, so identifying the people, systems, messaging and other standards in advance makes good business sense. Here are steps you can take in advance to take control:

IDENTIFY PEOPLE

Identify the Crisis Communications Team

Ideally, the organization's CEO will head up the team, with the top public relations executive (or outside agency or consultant) and legal counsel as chief advisers. Senior executives, usually the heads of major divisions, should be identified to serve as your organization's Crisis Communications Team.

CRISIS COMMUNICATIONS TEAM

NAME & TITLE	ROLE & RESPONSIBILITY	CONTACT INFORMATION

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IDENTIFY PEOPLE continued

Identify Spokespersons

The pool of potential spokespersons/subject matter experts should be identified and trained in advance, even though you will make the ultimate decision about who will speak will be made once the crisis breaks. Consider all the different channels of communications, both internal and external, that you may need to cover.

CRISIS SPOKESPERSONS

NAME & TITLE	EXPERTISE	CONTACT INFORMATION

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IDENTIFY PEOPLE *continued*

Identify and Know Your Stakeholders

Create a complete database of internal and external stakeholders to guarantee that they obtain the exact messages you want them to hear and potentially repeat to other individuals or media outlets. Use the Smartsheet Stakeholder Communication Plan Template and update it frequently.

STAKEHOLDER COMMUNICATION PLAN

STAKEHOLDER	POWER / INTEREST	KEY INTEREST & ISSUES	COMMUNICATION VEHICLE	FREQUENCY	COMMENTS

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IDENTIFY POTENTIAL CRISES AND A PLAN

Brainstorm Potential Crises in Advance

The Crisis Communications Team should identify every potential threat based on your known vulnerabilities. It may become clear that some crisis situations may be preventable by shifting existing conditions or operational methods. You should consider possible responses, and best and worst case scenarios. Often organizations are aware of an upcoming event like layoffs, a merger or a move, so you can begin to plan well in advance of the actual event.

ADVANCE CRISIS PLANNING

POTENTIAL SCENARIOS Security Breach, Product/Technology Failure, Natural Disaster, Financial Crisis, Workplace Violence, Environmental Crisis	
SCENARIO 1	
SCENARIO 2	
SCENARIO 3	
UPCOMING EVENTS Mergers, Acquisitions, Moves, Layoffs	
SCENARIO 1	
SCENARIO 2	
SCENARIO 3	

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IDENTIFY POTENTIAL CRISES AND A PLAN continued

Crisis Communication Response Plan

Your brainstorming and assessment process should lead to the creation of a Crisis Response Plan tailored to your organization.

CRISIS COMMUNICATION RESPONSE PLAN TEMPLATE

EVENT NAME	
COMMUNICATION GOAL	
TARGET AUDIENCES	
ISSUE ANALYSIS AND VERIFICATION	
WHAT HAPPENED?	
WHICH CREDIBLE INFORMATION SOURCES CONFIRMED?	
WHAT ADDITIONAL FACTS ARE NEEDED TO PUT THE EVENT INTO PERSPECTIVE?	
WHEN DID IT HAPPEN?	
WHO IS INVOLVED?	
HOW DID IT HAPPEN?	
WHAT IS CURRENTLY BEING DONE?	

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IDENTIFY SYSTEMS

Establish Notification Systems

Set up notification systems to rapidly reach your stakeholders. Employing more than one type of communications platform (email plus text for example) the chances are much greater that the message will go through. Using your stakeholder database, you can purchase or rent an [emergency notification system](#) to automatically contact pre-established database.

NOTIFICATION SYSTEMS DESCRIPTION

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Establish Monitoring Systems

Monitoring what's being said about you on traditional and social media can alert you to negative messages that could foment a crisis. Monitoring all stakeholder feedback during a crisis supports logical changes to strategy and tactics. Free services include Google Alerts and Hootsuite, but you can also use paid monitoring services to report results in various formats. Train personnel, such as Customer Service reps, who have front-line contact with stakeholders to immediately report to the Crisis Communications Team.

MONITORING SYSTEMS DESCRIPTION

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Establish Crisis Verification System – What, When, Who, How and Why

The first step is to determine what has happened and immediately identify and document as many facts as possible based on essential questions: What happened and has the situation been confirmed by credible information sources? What additional facts are needed to put the event into perspective? When did it happen? Who is involved? How did it happen? What is currently being done?

CRISIS VERIFICATION SYSTEM DESCRIPTION

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IDENTIFY MESSAGING

Develop and Use “Holding Statements”

You'll need to develop full messages based on the facts and that may take some time. Using pre-determined “holding statements,” immediately after a crisis gives you breathing space and communicates that you're aware and working on the matter. For example: “Expect a statement from our CEO within two hours” or “Check Twitter or our website for updates.” Holding statements should be reviewed regularly.

HOLDING STATEMENT PLANNER

- Acknowledge the crisis.
- Give yourself some time.
- Show commitment.

STATEMENT SAMPLES	DELIVERY MODALITY/MODALITIES

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IDENTIFY MESSAGING continued

Key Messages

The Crisis Communications Team should aim to develop three crisis-specific messages based on verified information for all stakeholders and, if needed, some targeted messaging for specific stakeholder groups based on identified scenarios. These can be modified based on the actual crisis. Messaging will also need to be adapted to different forms of media. For example, Twitter may require links because of character limits.

KEY MESSAGE PLANNER

AUDIENCE	TOP THREE KEY MESSAGES	DELIVERY CHANNELS & SPOKESPERSON
ALL STAKEHOLDERS		
AUDIENCE 1		
AUDIENCE 2		
AUDIENCE 3		

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IDENTIFY KEY LEARNINGS

Post-Crisis Review

Once the crisis has passed, a best practice is to conduct a formal analysis in team meeting by the full Crisis Communications Team. Review what worked, what failed, and what could be improved prior to the next event, and use the results to update the Crisis Communication Response Plan.

CRISIS REVIEW FORM

STRATEGY / TACTIC	DESCRIPTION	RESULT	POSSIBLE IMPROVEMENTS
SUCCESSFUL			
SUCCESSFUL			
PROBLEMATIC			
PROBLEMATIC			

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