Successful Crisis Management for Your Organization

May 2017
Agenda

+ Introduction and housekeeping
+ Disaster lessons
+ Options to organize your team
+ Four Essentials
+ Critical Event Management
USE THE Q&A FUNCTION TO SUBMIT QUESTIONS
Introduction – Our Presenters

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Demand Generation  
Everbridge
Critical Event Management

Too much noise
Too many tools
Too many info silos
Too time consuming
Too much at RISK
Successful Crisis Management for Your Organization
Agenda

• Disaster Lessons
• Options to Organize Your Team
• Four Essentials:
  – Team Structure: Roles and Responsibilities
  – Incident Assessment Process and Team
  – Incident Action Planning
  – Effective and Timely Communications
• Successful Crisis Management
Out of Danger Comes Opportunity

Types of Emergencies
1. Routine emergencies
2. Crisis emergencies
3. Emergent crises

Disaster Lessons
Disaster Lessons to Remember

- Declare the disaster and activate as early as possible.
- Staff initially to a high-enough level.
- Issue clear and consistent instructions to staff.
- Delegate authority to those who have been tasked.
- Assume and plan for some degradation in team members, plans, and/or systems over time.
  - In other words, closely monitor effectiveness.
Disaster Lessons to Remember

• Avoid two common syndromes:
  – “Been there done that!”
  – “We’re a really smart group and we’ll figure it out when it happens.”

• Make decisions; keep moving forward.
  – Make changes when necessary, and keep moving.

• Keep aware of what is going on, maintain situational awareness.

• Communicate, communicate, communicate.
Disaster Lessons to Remember

Repeat after me:

“I will never, ever, never forget about social media, and the power of an individual to change my company’s life forever.”

Dr David Dao being forcibly dragged off a United Airlines flight, 4/9/17. (Still capture from video on CNN.com.)
Out of Danger Comes Opportunity

May 2017 Slide 7

Stop Brutality
# Activist Asian

# Unfriendly Skies Chi

Khong Ai Nen Bi Dai Xuu Nhu Vay

Stop Brutality From Law Enforcement

AMERICANS
8 TYPES OF CORPORATE APOLOGIES

- **Non-Apology**: Mistakes were made.
- **Silent Treatment**: It was somebody else's fault.
- **Corporateese**: Let's call it "re-accommodate."
- **Legalese**: Conditionally we're sorry.
- **Deflection**: At least we're not Uber.
- **Faux-Sincere**: We deeply regret that this hasn't blown over.
- **Redo**: We apologize for our previous apologies.
- **Tom Fishburne**: We apologize for our previous apologies.
Options to Organize Your Team
Organizing Your Team

• Most companies create a “tactical” team and a “strategic” team.
  – Tactical team members represent key departments.
  – Strategic team members are (usually) the executives.

• Is your tactical team structured like:
  – Your “usual” reporting structure?
  – The Incident Command System?
  – Something else?
“Usual” Reporting Structure

• Plus:
  – It’s what you know.

• Downsides:
  – Span of control may be too large for effective management.
  – There may be too many silos of responsibility to be efficient.
  – There might be a duplication of effort, or things may get missed altogether.
  – There may be no clear authority.
Six Cs of Crisis Management

• In a crisis, six things are needed to manage effectively:
  1. Command.
  2. Control.
  4. Coordination.
  5. Communication.
  6. Consistency.
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Four Essentials
Four Essentials

• For your team to be great, four things must be in place.
  The team must:
  1. Know their roles and responsibilities.
  2. Have a clear incident assessment process, team, and escalation strategy.
  3. Know how to develop an action plan.
  4. Be able to develop and issue timely and responsive communications.
Team Structure: Roles and Responsibilities
Incident Command System

The Incident Command System (ICS) was developed in response to a series of fires in Southern California in the early 1970s.

It is used by the public and private sectors across the U.S. and in many parts of the world to manage incidents.

Since 2005, all federal, state, county, and city agencies and departments are required to use ICS.
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Emergency Management & Safety Solutions

Command

Communications

Operations

Logistics

Planning & Intelligence

Finance
Your Team’s Structure, Roles, and Responsibilities

• Be sure that your plan has:
  – Clearly defined roles and responsibilities for everyone in your team.
  – Checklists for all positions.

• Also make sure that your plan and checklists fit your expected risk profile, your likely activations.
The Role of the Executives

• Ideally, they are not part of the tactical Crisis Management Team.

• Executives have four overall strategic responsibilities:
  1. Providing strategic and policy oversight.
  2. Approving large expenditure requests.
  3. Acting as senior statesperson (relationship manager) to all key stakeholders: employees, major customers, investor community, Board of Directors, etc.
  4. Acting as media spokesperson, if the situation warrants it.
Incident Assessment Process and Team
Who? And What?

• Who… comes together when an incident occurs?
• Who… makes the decision to activate plans and teams?
• What… is the criteria that they use?
  – Is this documented?
  – Is it practiced?
Incident Assessment Team (IAT)

• Determine who should be on the team.

• Team’s responsibilities:
  – Conduct initial assessment.
  – Review the criteria and escalation strategies for plan activation.
  – Determine whether to activate plan.
    ▪ Note: Any of the members can activate the plan and the team.

• Communication:
  – Determine if the team should meet virtually at first via a conference bridge.
  – Identify where the team will physically meet when it’s feasible/possible.
Situational Awareness

• First, gather “situational awareness.”
  – What do you know?
  – What is impacted?
    ▪ Which facility? Other locations?
    ▪ Are employees injured?
    ▪ Are customers, visitors, or vendors affected?
    ▪ Are there impacts to the business?
    ▪ What about impacts to the organization’s reputation?
  – What is the effect of the incident?
Initial Discussion

• What type of event is it?
  – Local event? Example: Limited power outage, fire.
Five Initial Topics to Discuss

• **People**: Are lives in danger? Is there a life safety issue? Is there an impact to your employees, customers, vendors, or visitors?

• **Facilities/Critical infrastructure**: Is a facility or critical infrastructure component at risk?

• **Technology**: Is there a disruption of technology services (e.g., telecom, network, data center)? Is there an information security issue?

• **Business**: Are you able to perform your mission-critical business activities? Does the event impact your customers? Does the situation have a significant financial impact to the company?

• **Company or facility reputation/brand/mission-critical activities**: Does the event have an impact on the organization’s or facility's reputation? Does the situation have significant impact to customers or employees?
# Activation Matrix

<table>
<thead>
<tr>
<th>People</th>
<th>Facilities</th>
<th>Technology</th>
<th>Mission-Critical Activities</th>
<th>Reputation/Brand</th>
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<tbody>
<tr>
<td>Your Facility</td>
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<td>Other Locations</td>
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<td>Regional Event</td>
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Assessment Process

- What is the severity level?
- Does the incident meet activation criteria?
  - If yes:
    - Activate the Crisis Management Plan (CMP).
    - Activate the Emergency Operations Center (EOC).
      - Determine if it should be in the primary or secondary location, or if it should be a virtual EOC.
    - Once the team is activated, the IAT folds into the Crisis Management Team.
    - Inform the Executive Crisis Management Team.
  - If no:
    - Should the situation be monitored?
      - If yes, determine who on the IAT is in charge of monitoring, when the next briefing will be, and where will it be held.
      - If no, follow up using standard business practices.
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Developing Incident Action Plans
Incident Action Plan

• An IAP contains:
  – Overall incident status / situational awareness.
  – Specific strategic objectives and any necessary supporting information.
  – Assignment of responsibility for each objective.
  – Date and time of the next operational period.

• The IAP should be written:
  – This allows for less confusion and miscommunication.
  – It can be easily shared.
Steps to Build an IAP

   – Know where you will get your information: Employees, vendors, government, traditional media, social media.

2. Establish strategic incident objectives.
   – Ensure that necessary resources are available to complete the tasks.

3. Assign all objectives (to a team or individual).

4. Determine the operational period (when you will meet again).

5. Communicate the plan to all identified stakeholders.
Effective and Timely Communications
Effective and Timely Communications

- Effective and timely communications don’t just “happen.” They take careful planning and the right tools.
- What you need:
  - A Communications plan that includes authorities.
  - Pre-written templates.
  - The right tools.
Communications Plan

• The Communications plan should clearly outline:
  – Who can write the communications.
  – Who can edit them.
  – Who approves them.

• We think there are three levels to consider:
  – Emergency communications.
  – Tactical communications.
  – Strategic communications.
Pre-written Templates

- Pre-written and pre-approved communications templates are needed in order to have a timely response.
- These templates can be in the three major categories mentioned in the previous slide:
  - Emergency communications.
  - Tactical communications.
  - Strategic communications.
The Right Tools

- Determine what tools you will use in the crisis. What are your options?
  - Public address system.
  - Voice, email, text, website.
  - Emergency notifications system (ENS) that can reach:
    - Mobile phone (calls and SMS messages).
    - Office phone.
    - Home phone.
    - Work and home email.
Successful Management of a “Routine,” “Crisis,” or “Emergent Crisis” Requires…
Successful Crisis Management

• Successful crisis management can be achieved by having:
  – Clearly defined and documented team process.
  – Clear team roles and responsibilities.
  – Defined initial assessment team and process.
  – Written IAPs for all plan activations.
  – Written communications plan with pre-written templates and effective delivery tools.
  – Regular training and exercises to increase familiarity and competency.
Thank you

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Everbridge Critical Event Management
Critical Event Management

Assess

Locate

Act

Analyze

Communicate

& Collaborate

Visualize & Orchestrate
Critical Event Management Yields

Better management control + Less disruption + Lower cost

Security + IT Operations + Business Operations + Supply Chain
ASSESS: What is happening? What is the impact?

Determine the likelihood, severity, and impact

FRONT LINE INTELLIGENCE

SOCIAL INTELLIGENCE

EVERBRIDGE NETWORK PUBLIC SAFETY INTELLIGENCE

TRUSTED THREAT INTELLIGENCE

WEATHER INTELLIGENCE

SYSTEM INTELLIGENCE
LOCATE: Who is in harm’s way? Who can help?

Identify resolvers, impacted personnel, and key stakeholders

- Static Location
- Last Known Location
- Expected Location
- Availability and On-Call
- Skills or Needs
ACT: Which team members need to act?

Automate Incident Response

Automate:
- Standard Operating Procedures
- Escalation policies
- Best Practices
- Response team and device activations
- Collaboration
ANALYZE: Which team performed best?

Which tasks took too long? What Resources were missing?

- BENCHMARKS
- AFTER ACTION REPORTS
- DETAILED NOTIFICATION ANALYSIS
- TEAM PERFORMANCE
- OPERATIONAL RESPONSE
COMMUNICATE: What should employees do?

Notify employees on what action to take and keep stakeholders informed.

- 200+ Countries
- 100+ Devices
- Globally Local

Employee Initiated

Organization Initiated
Everbridge for Critical Event Management

Many types of EVENTS

Weather
Active Shooter
Supply Chain
HAZMAT
IT Outage
Medical Emergency
Public Crisis
Cyber
Product Recall
Terrorism

Many different CUSTOMERS

9 of the 10 largest investment banks
6 of the 10 largest global auto makers
6 of the 10 largest global consulting firms
4 of the 4 largest global CPA firms
8 of the 10 largest U.S. cities
24 of the 25 busiest North American airports
4 of the 10 largest health insurers
4 of the 10 largest health providers

3,200+ Enterprise Customers
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Thank you for joining us today!

If you’d like to request a demo of the Everbridge Platform please visit www.Everbridge.com/request-demo.