Facilitator Guide

Crisis Management Planning

Course ID: 04-17-1a

Crisis Management Planning

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Note

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INTRODUCTORY MATERIALS

MODULES

Getting Started

About This Guide

What's the purpose of this guide?

This blended learning facilitator guide provides a master reference document to help you prepare for and deliver the "Crisis Management Planning" program. The training in this guide may be delivered remotely or in-person.

What will I find in the guide?

This facilitator guide is a comprehensive package that contains

- the workshop delivery sequence

- checklists of necessary materials and equipment

- presentation scripts and key points to cover, and

- instructions for managing exercises, case studies, and other instructional activities.

How is this guide organized?

This section, "Getting Started," contains all of the preparation information for the "Crisis Management Planning" program, such as learning objectives, pre-work, required materials, and room set-up.

Following this section is the "Training At A Glance" table. This table can serve as your overview reference, showing the module names, timings, and process descriptions for the entire program.

Finally, the program itself is divided into *modules*, each of which is comprised of one or more *lessons*. A module is a self-contained portion of the program, usually lasting anywhere from 20 to 90 minutes, while a lesson is a shorter (typically 5-20 minute) topic area. Each module begins with a one-page summary showing the Purpose, Time, Process, and Materials for the module. Use these summary pages to get an overview of the module that follows.

About This Guide, continued

How is the text laid out in this guide?

Every action in the program is described in this guide by a text block like this one, with a margin icon, a title line, and the actual text. The icons are designed to help catch your eye and draw quick attention to "what to do and how to do it." For example, the icon to the left indicates that you, the instructor, say something next. The title line gives a brief description of what to do, and is followed by the actual script, instruction set, key points, etc. that are needed to complete the action.
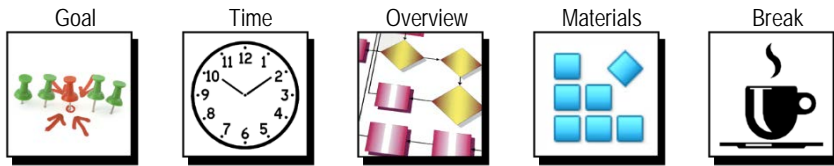
A complete list of the margin icons used in this guide is provided on the following page.

IMPORTANT NOTE

You may also occasionally find important notes such as this one in the text of this guide. These shaded boxes provide particularly important information in an attention-getting format.

Graphic Cues

Module Blocks

Goal	Time	Overview	Materials	Break

Lesson Blocks

Activity	Audio	Capture	Case Study	Check	Computer	Data Tables

Evaluation	Flipchart	Game	Handouts	Highlight	Important	Key Points

Lab	Objective	Picture	Process	Projection	Q&A	Role Play

Say This	Speaker	Time	Tools	Transition	Video	Workbook

The Program in Perspective

Why a "Crisis Management Planning" program?

Even the smallest crisis can quickly cascade into a major organizational disruption, unless teams are prepared. Without planning, recovery can take longer and cost more to address, than if a plan is in place.

Learning Objectives

After completing this program, participants will be able to:

- Recall key tasks to handle a crisis.

- Step through the crisis planning process.

- Initiate a crisis management plan for your organization.

Program Timing

Requires: 1 hour, 10 minutes

Number of Participants

Minimum: 5 Maximum: 20 Optimum: 15

Program Preparation

Pre-Work

None

Required Materials

- Facilitator guide for instructor
- Participant guide for each learner
- Web browser access to the companion online scenarios
- Access to Internet meeting room, if this program is delivered remotely
- Job aid to be distributed at the end of this training program

Room Set-Up

- In-person seating needs to allow learners to sit in groups, when noted in this guide.
- Remote learning session needs capability to support breaking into meeting groups, or, alternatively, support chat or instant messaging for breakout sessions.
- Learners can bring their own devices to support in-person training.
- LCD projector and screen is helpful to review the scenarios as a group, or a large monitor with audio at the front of the training room.

Instructor Preparation

- Review this facilitator guide.
- Review the online scenarios.
- Confirm system connectivity.
- Familiarize yourself with the online meeting system that you use, if delivering this program remotely.

Training at a Glance

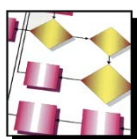| Time	Module	Description
0 hours, 15 minutes	Introduction	■ As a group, watch the complete online crisis planning scenario that is a companion to this classroom learning. ■ Go around the room and gauge each participant's reaction to the scenario.
0 hours, 55 minutes	Scene-by-scene scenario review	Take a closer look at each stage of the scenario and discover lessons learned

Introduction

Goal

■ Discover what crisis planning is.

■ Identify your team's potential crisis planning needs.

Time to complete: 0 hours, 15 minutes

Number of lessons: 1

Overview

■ As a group, watch the complete online crisis planning scenario that is a companion to this classroom learning.

■ Go around the room and gauge each participant's reaction to the scenario.

Materials Needed

■ Facilitator guide for instructor

■ Participant guide for each learner

■ Web browser access to the companion online scenarios

■ Access to Internet meeting room, if this program is delivered remotely

Watch the complete online scenario

Facilitator	Producer
Cumulative time: 0 hours, 0 minutes Time to complete this lesson: 15 minutes Before participants each view the scenario for themselves, confirm that you are able to view it yourself. Point your browser to: http://www.robertbush.com/Vyond_Captivate_Demo_1/index.html	**Confirm everyone's access to the online component of this activity.**
Welcome to this course about crisis management planning.	**Introduce the presenter, the course, and give each person in the room the opportunity to introduce themself.**
To start, we will all watch an online crisis planning management scenario. Take notes as you go along at your own pace. We will review each scene of the scenario as a group, once you are done.	

Watch the complete online scenario

Facilitator	Producer
Open your Web browser and go to the following URL: **http://www.robertbush.com/Vyond_Captivate_Demo_1/index.html**	**Note, for this demo, the scenario only contains the <u>first</u> scene. The full scenario will be developed and posted online at a later date.**

As you watch the online scenario, think about your role on the team and your role in your organization. Jot down your notes. We will go around the room and compare notes, after you watch this scenario.

Watch the complete online scenario

Facilitator	Producer

SCENARIO NOTES

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Watch the complete online scenario

Facilitator	Producer

Now that everyone has had a chance to go through the whole scenario, let's go around the room and ask some questions and compare notes.

Conduct a Q&A session.

Questions:

1. What is your organizational role?

2. What kinds of problems do you see every day in your role?

3. Do you get complaints?

4. How often?

5. What is their impact?

6. Is there a formal mechanism to handle complaints?

7. Do you discover events that might critically interrupt the flow of business, such as numbers that do not add up, or product defects?

Watch the complete online scenario, continued

Facilitator	Producer

Next. We will revisit the first scene of the scenario you just watched. But, first, let's take a break.

Break

Refreshment

Time: 15 min

Transition to Scene-by-scene scenario review
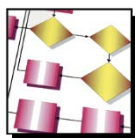

Scene-by-scene scenario review

Goal

Recognize key crisis management strategies as they develop throughout the scenario.

Time to complete: **0** hours, **55** minutes

Number of lessons: 7

Overview

Take a closer look at each stage of the scenario and discover lessons learned

Materials Needed

- Facilitator guide for instructor
- Participant guide for each learner
- Web browser access to the companion online scenarios
- Access to Internet meeting room, if this program is delivered remotely

Scene 1 of 7 Review

Facilitator	Producer

Cumulative time: 0 hours, 15 minutes

Time to complete this lesson: 10 minutes

Now that we are back, let's replay scene 1 of the scenario, and take a closer look at how the crisis begins.

Scene 1 of 7 Review

Facilitator	Producer

Here is the script that the characters say in scene 1:

Narrator: Organizational crises can arise from internal or external sources, from human error or natural disasters. Crises are anything that threaten an organization's viability, that can compromise finances, normal operations, or public image. Let's see how a payroll team resolves an organizational crisis.

Cut to Lenny, seated at workstation working on laptop.

LENNY (ANXIOUS)

Oh, Umm…

(phone rings and he picks up)

Payroll. This is Lennie.

Inset of Alli, a woman, on the phone.

ALI   (AGITATED BUT CONTAINING IT)

Hi. This is Alley in marketing. I got a notice from my mortgage company this morning. Their direct debit bounced because of lack of funds in my account.

LENNIE

Ohhhhhhhh.

ALI   I called my bank just now. My paycheck was not direct deposited last Friday.

LENNIE

Oh, I see. Let me look up your account…

Scene 1 of 7 Review

Facilitator	Producer

Run the activity.

Ask the class to brainstorm a list of dos and don'ts to guide responding to people who bring problems to your attention. Lead the group to consider the following points:

- Don't just brush off or ignore the complaint.

- Gather pertinent information.

- Don't give too much information during an initial complaint.

- Check your facts and provide only accurate information.

- Don't over promise your ability to correct the problem.

- Be responsive and explain what you will be able to do immediately.

Let's move to the second scene.

Scene 2 of 7 Review

Facilitator	Producer

Cumulative time: 0 hours, 25 minutes

Time to complete this lesson: 10 minutes

Let's now replay scene 2 of the scenario, and take a closer look at how the crisis develops.

Here is the script that the characters say in scene 2:

ONSCREEN TEXT:

Key initial Actions

TEXT BUBBLE

Crises can be difficult to prevent but effective handling of crises can minimize the harmful effects and possibly win greater trust and loyalty. Much depends on your key initial actions.

Title on Screen

Recognize a Crisis

TEXT BUBBLE

Be ready to recognize a crisis when it happens. Stay mindful of how even the small details of your job can impact the company, its customers and employees. When British Petroleum officials failed to recognize a small problem with the drilling line as critical, their whole crude oil drilling derrick went up in explosive flames. Dozens of lives were lost and the Gulf of Mexico was polluted with millions of gallons of crude oil. Most crises are not life threatening like this but they all can impact the company's bottom line by consuming time and resources, causing revenue and liability losses and potentially fatal damage to an organization's public reputation. Big or small, quick, effective response to crises is essential.

Cut back to Lenny still on phone in cubicle.

LENNIE

(SEES Crystal WALKING BY AND HAND GESTURES HER TO WAIT)

Yes, before the day is out, I'll get on it.

(HANGS UP AND SPEAKS TO Crystal

Scene 2 of 7 Review

Facilitator	Producer
I have five employees who missed their paychecks last Friday.	

CRYSTAL

(startled)

Oh… I have a meeting at 9:30. Can you be in my office in five minutes with the account details?

Lenny's phone and email bells ring.

LENNY

(to Crystal)

Yes.

CRYSTAL

Good.

Crystal TURNS ON HER HEEL AND CONTINUES TO HER OFFICE.)

Lenny answers phone but is interrupted by Maria.

MARIA

(storms up to Lenny's desk and complains about her paycheck.)

(sound is muted)

Scene 2 of 7 Review

Facilitator	Producer

Run the activity.

1. Ask the class to break into groups of three or four.

2. Have them discuss what Lennie did for each positive answer and why each negative answer is inappropriate.

3. Ask the groups to list the key initial actions that Lennie took.

4. As a class, compile the actions lists.

5. Make sure that the list includes:

- Recognize a crisis

- Gather information, and

- Notify leadership

Let's move to the third scene.

Scene 3 of 7 Review

Facilitator	Producer

Cumulative time: 0 hours, 35 minutes

Time to complete this lesson: 5 minutes

Here is the script that the characters say in scene 3

Title on Screen:

Notify Leadership.

VOICE OVER

Don't wait, notify team leadership as soon as you recognize a potential crisis. The longer normal business operations are disrupted, and the more people are affected, the stronger the negative impressions are made. Quick resolutions depend on anticipating what could happen and planning and preparing a response.

Title on screen: Anticipate the what ifs

Fade to Crystal's office.

Lenny walks into Crystal's office.

Crystal (GLANCES AT LENNY SEATING HIMSELF WHILE SHE CLICKS AT COMPUTER)

Good. Tell me what you can.

(a printer spits out a multipage document that Crystal stuffs into a folio.)

I have ten minutes.

LENNY

I've got eleven employees complaining they didn't get their paychecks Friday.

Looks like their direct deposits didn't go through.

CRYSTAL

Let's list possible causes.

Title on Screen: Consider potential risks to your organization.

Scene 3 of 7 Review

Facilitator	Producer

VOICE OVER

Consider potential sources of risk, including communications, databases, human errors, sabotage, electric power failure and even rumors on social media.

Run the activity.

- Make a list of potential risks in the scenario's organizational roles.

- Break participants into pairs, to review each other's lists and provide suggestions

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Next, we will revisit the fourth scene of the scenario. But, let's take short break, before we move ahead.

Break

Refreshment

Time: 5 min

Scene 4 of 7 Review

Facilitator	Producer

Cumulative time: 0 hours, 40 minutes

Time to complete this lesson: 10 minutes

Let's now replay scene 4 of the scenario, and continue our look at how the team handles the crisis.

Here is the script that the characters say in scene 4:

Cut to Crystal's office.

CRYSTAL

(reads list)

Employee error inputting transaction. Funds withheld by our bank. Transaction error with employee banks. Internal systems error. Systems hack. Sabotage or funds theft.

We need more information. If this is a companywide problem, someone could lose their job if we don't get right on it. Julie ran payroll last Friday?

LENNY

Yes.

CRYSTAL

I need you to get me a problem account summary and keep adding to it as complaints come in.

Scene 4 of 7 Review

Facilitator	Producer

Run the activity.

- Guide the discussion to reveal that the incorrect answer might be a correct answer for a different type of crisis.

- Then have each participant write down the sources of information relevant to their role in the organization.

- Have the participants share the sources with the whole class and modify their lists from listening to other's ideas.

Let's move to the fifth scene.

Scene 5 of 7 Review

Facilitator	Producer

Cumulative time: 0 hours, 40 minutes

Time to complete this lesson: 10 minutes

Let's now replay scene 5 of the scenario, and continue our look at how the team resolves the crisis.

Here is the script that the characters say in scene 5:

Title on Screen:

Pre-establish communication relationships.

NARRATOR:

Pre-establish communication relationships with the individuals who can provide definitive information about the crisis. Make sure you have multiple communication modes.

Cut back to Crystal's office.

CRYSTAL

(to Lenny)

I am contacting our payroll verification team.

(READS ALOUD WHILE TYPING)

…and confirming receipt of your paycheck of last Friday.

(LOOKS OVER TO LENNY)

I will speak to Mark in IT. He is in my 9:30 meeting and can initiate a hacker audit.

(LOOKS AT LIST AGAIN)

That leaves our bank liaison.

(clicks on computer)

Hmm that is…

LENNIE

Best way to reach Jamal is texting.

(pulls out cell phone)

If you want, I can?

Scene 5 of 7 Review

Facilitator	Producer

CRYSTAL

By all means. Tell him to report to me by 10:30 what he learns from our bank.

LENNY (STILL TEXTING)

Jamal says he's on it.

Run the activity.

- Ask each participant to list who they might need to pre-establish communications relationships with, in their organizational roles.

- Have them share their lists in the groups and give feedback.

Let's move to the sixth scene.

Scene 6 of 7 Review

Facilitator	Producer

Cumulative time: 0 hours, 50 minutes

Time to complete this lesson: 10 minutes

Let's now replay scene 6 of the scenario, and continue our look at how the team resolves the crisis.

Here is the script that the characters say in scene 6:

Crystal

I'm the single point of contact on this one. Copy all your communications to me. I have to know everything that is going on with this. Can you be back here at 10:30 with your summary?

LENNY Yes.

CRYSTAL

…and bring Julie with you.

Lenny nods soberly.

Title on screen: Establish a Crisis Command Center.

VOICE OVER

Establish a Crisis Command Center with appropriate communications equipment and meeting space. Designate a point person who will be the center of communications, information gathering and question answering.

Title on screen: Control the narrative.

VOICE OVER

Determine who needs to know about the crisis. Give as much accurate information as soon as possible, to head off ugly rumors, misinformation or panic. Monitor the news media and publish corrections that affirm the organization's integrity and restore the public trust that is essential to a company's long-term viability.

Scene 6 of 7 Review

Facilitator	Producer

Run the activity.

- Ask each participant to consider who would be best suited to be crisis point person for the crisis command center in their organizational role.

- Next, have participants discuss this consideration with their groups.

Finally, let's move to the seventh scene.

Scene 7 of 7 Review

Facilitator	Producer

Cumulative time: 1 hour, 0 minutes

Time to complete this lesson: 10 minutes

Let's now replay scene 7 of the scenario, and wrap up our look at how the team resolves the crisis.

Cut back to Crystal's office.

CRYSTAL

One more thing. Have you responded to the emails yet?

LENNY

No. Just promised to have something by the end of the day on the phone.

CRYSTAL (CLICKING COMPUTER)

I don't think we want to put the whole company in a panic. Let's just respond to the complaints until we know exactly who's affected. Ah… Here it is… This response form was approved by legal, last year.

Title on screen: Prepare response communications.

VOICE OVER

A crisis management plan should include prepared communications media appropriate for each scenario. Review your existing media, whether it is a carefully crafted email or a short informational video clip and repurpose what you can to have an appropriate response ready.

Title on screen: Get prepared.

VOICE OVER

Get prepared. Think ahead. Plan responses. Rehearse necessary interactions for immediate and decisive response.

It all begins with your plan.

Title on screen: Crisis Preplanning Process

- Brainstorm potential crises.

- Identify information gathering methods.

Scene 7 of 7 Review

Facilitator	Producer

- Pre-establish crisis communications relationships.

- Determine crisis command personnel, location, and equipment.

- Review and develop response media.

- Develop corrective actions

- Rehearse crisis responses.

Fade to black.

Run the activity.

- Review the crisis planning steps with the whole class.

- Ask the groups to look again at their individual lists of crisis risks, and to brainstorm a corresponding list of potential corrective actions.

- Provide each participant with the job aid included with this learning program.

- Ask participants to take the job aid back to their organizational groups, to help implement a crisis planning process.

Conduct a Q&A session.

Are there any final questions?

Thank you all for participating today in this program.