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**(Note that you can change the logo above to that of your business or brand.)**

 **Crisis Management and Communication Plan**

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## **Purpose**

*Define the purpose of this document. Highlight when this should be referenced and what kind of information and references will be outlined.*

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## **Escalation Framework**

*Use this framework below to determine the severity of a crisis.*

*In the “description” column, describe what constitutes that definition of a crisis and what actions must be taken in response. Also include a few examples of what that crisis would look like.*

*In the “action” column, mention teams or individuals who may take action, such as legal, the PR & communications team, customer marketing, the social media team, executive assistants, the C-suite, account managers or executives, and more.*

| Level | Description | Action |
| --- | --- | --- |
| Level 1 | *This is the highest level of crisis escalation and should involve an all-hands-on-deck approach. Describe this situation as immediate to your customers, partners, employees, and/or all stakeholders.* Examples: *list the examples of this level. Typically, they involve violence, executive misconduct, or a long-term threat of damage to your customers, the company and/or stakeholders.* | Person/Team #1: *Task or action*  Person/Team #2: *Task or action* Person/Team #3: *Task or action* |
| Level 2 | *Level 2 presents a moderate potential risk or impact on business operations, customer success, and/or company reputation.* Examples: *list the examples of this level. These may include the risk of immediate major customer churn.*  | Person/Team #1: *Task or action*  Person/Team #2: *Task or action* Person/Team #3: *Task or action* |
| Level 3 | *This is unlikely to pose a long-term risk to or impact business operations, customer success, and/or company reputation, but the team should still be on the same page for responding.*   Examples: *instances can include an executive leave of absence, a moderate customer impact that can easily be (or already has been) remedied, or rumors (such as a merger/acquisition).* | Person/Team #1: *Task or action*  Person/Team #2: *Task or action* Person/Team #3: *Task or action* |
| Level 4  | *This is where most “crises” will fall into. They tend to be slightly bigger versions of day-to-day issues that may need a bit of extra effort to be fully resolved or addressed.* Examples: *Some examples include a short outage with no impact on support or an angry customer on Twitter.*  | Person/Team #1: *Task or action*  Person/Team #2: *Task or action* Person/Team #3: *Task or action* |

**Incident Response Team**

*Describe the purpose of this team, why it was assembled, and what it is responsible for doing.*

### ***First Line of Defense***

*Identify the key players to be informed once the company is aware of the crisis. The list should include the names of the individuals, the team/department those people are members of, and how to best communicate to each member individually. If there is an internal chat system or group email for the whole team, list that here as well.*

● ***Person/Team #1:*** *Email and/or Phone Number*

● ***Person/Team #2:*** *Email and/or Phone Number*

● ***Person/Team #3:*** *Email and/or Phone Number*

● ***Person/Team #4:*** *Email and/or Phone Number*

● ***Group Email/Communication Method:*** *List Here*

### ***Greater Response Team***

*Indicate which escalation level will involve the Greater Response Team. Additionally, list out the core departments that comprise the Greater Response Team, and if appropriate, note that other departments or individuals not listed below may be brought in as needed. Teams that make up a greater incident response team may include the following:*

● Communications

● Customer Support

● Legal

● Partner Communications

● Social Media

● Customer Marketing

● People Ops and HR

● Product/Engineering

● Executives

● Security

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## **Roles and Responsibilities**

*In a general crisis – regardless of escalation – what should each of these departments be responsible for once informed of the crisis? Feel free to add a row to include any other department that is right for your business.*

| **Team** | **Contact Name** | **Roles and Responsibilities** |
| --- | --- | --- |
| Communications | Name | ● *Example Responsibility* |
| Customer Support | Name | ● *Example Responsibility* |
| Legal | Name | ● *Example Responsibility* |
| Social Media/Marketing | Name | ● *Example Responsibility* |
| HR | Name | ● *Example Responsibility* |
| Product/Engineering | Name | ● *Example Responsibility* |
| [Other Department] | Name | ● *Example Responsibility* |

**Crisis Management Process**

**Phase 1: ALERT**

*Outline the actions necessary to ensure the response team is notified as soon as possible. Emphasize that if someone is unsure if he or she should alert the team to alert the team that he or she should, just in case.*

*Your alert system can be as simple as an internal chat system channel or email alias.*

**Phase 2: ASSESS**

*Once the Response Team has been notified, what happens next? Explain how the team will assess the (potential) crisis, gather any available information, classify the incident via the escalation framework above, and prepare to take subsequent action*.

Here are some questions to answer to get you started:

● What happened

● Where and when?

● Who was affected?

● Who is involved?

● When did we learn about the incident?

● What is the impact/likely impact?

● Is there any immediate danger?

● Do we understand the entire issue?

**Phase 3: ACTIVATE**

*Turn your plan into action. Explain how the response team will communicate with the appropriate team members for their tasks and/or with external stakeholders for specific messaging.*

*In the box below, write out a few common tasks expected in a crisis situation, and delegate that task to a responsible party in the form of a department or an individual. These tasks could include incident response team communication, initial external messaging, gathering/monitoring information, finding a meeting space, team check-in cadence, etc.*

| **Action Items** | **Responsible Party** |
| --- | --- |
| *Example Action* | *Responsible Party* |
| *Example Action* | *Responsible Party* |
| *Example Action* | *Responsible Party* |
| *Example Action* | *Responsible Party* |
| *Example Action* | *Responsible Party* |

**Phase 4: ADMINISTER**

*Determine how the Incident Response Team will continue to assess, address, and resolve the incident. Once again, the type, scale, scope, and severity of the incident or crisis will determine the response. Tasks include communication to stakeholders, employees, and customers if appropriate, as well as developing a timeline, seeking external legal or technical assistance, moderating and responding to media, and updating your crisis communication plan. This section should address the steps for any crisis, whether long-term or short-term.*

| **Action Items** | **Responsible Party** |
| --- | --- |
| *Example Action* | *Responsible Party* |
| *Example Action* | *Responsible Party* |
| *Example Action* | *Responsible Party* |
| *Example Action* | *Responsible Party* |
| *Example Action* | *Responsible Party* |

**Part 5: ADJOURN**

*Once the immediacy of the crisis has dissipated, regroup as a team to go over your process for crisis management, response, and communication. Consider what changes should be made and update this plan with those changes.*

*Additionally, someone should take point on documenting exactly what the process was for this crisis, alongside any successes, learnings, or shortcomings. The team should work together to grade themselves on how this situation was handled using a self-review template included in your download.*

*Finally, if there are any outstanding issues that need to be addressed, or if further monitoring of communication/media is necessary, delegate individuals or departments to manage those tasks.*

| **Action Items** | **Responsible Party** |
| --- | --- |
| *Example Action* | *Responsible Party* |
| *Example Action* | *Responsible Party* |
| *Example Action* | *Responsible Party* |
| *Example Action* | *Responsible Party* |
| *Example Action* | *Responsible Party* |

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## **Do’s and Don’ts**

*What are the best practices for your crisis communication? During these times, it can be stressful and easy to jump to a decision that could cause more harm than good. Outline the do’s and don’ts for crisis management below.*

| **DO’S** | **DON’TS** |
| --- | --- |
| **✅ Example Do** **✅ Example Do** **✅ Example Do** **✅ Example Do** **✅ Example Do**  | **🚫 Example Don’t****🚫 Example Don’t****🚫 Example Don’t** **🚫 Example Don’t** **🚫 Example Don’t** |

## **Maintaining an Effective Response Plan**

*To help ensure your company’s crisis communication plan will be effective and current, take steps to keep the plan fresh and test your team’s ability to manage a crisis. This means editing this plan as needed, running mock-crisis war rooms on a set cadence, developing a training program for all members of the crisis communication team. Outline those processes in this section.*

**

How to Use This Template

*This document and attached templates are intended for your PR and/or crisis communications team. The first page should be dedicated to guiding principles – standards for the tone and approach your company should have when responding to crises – and how these messages will be communicated in these times.*

*Subsequent pages are dedicated to prompts for crisis communication. It should be emphasized that these statements are* ***intended to inspire your own, authentic, unique, and situation-appropriate response****. You are encouraged to change or alter any and all wording and phrasing so that it fits with your brand.*

### *Guiding Principle*

*Describe the purpose of this document.*

*Additionally, describe what best practices should be followed when issuing statements and/or responding to media inquiries during this time, including the tone, language, and approach to wording.*

### *Communication Channels*

*List the ways you will communicate crisis updates both externally (website, customer emails, social media, etc.) and internally (employee email, meeting rooms, etc.).*

*External*

* *Channel*
* *Channel*
* *Channel*

*Internal*

* *Channel*
* *Channel*
* *Channel*

#

*General Mishap, Accident, or Mistake by the Company*

*We owe our customers an apology. On [date], [describe incident that occurred]. As a result, [impact on customers]. We’re sorry for what happened – we take full responsibility for our actions and the impact this had on our customers. After reviewing the situation, we found the cause to be [cause of mistake here]. We are committed to ensuring our customers, employees, and stakeholders don’t have to deal with this again by [preventative measures here]. [Account managers/customer service/the company] have been communicating with our customers during this time, and are still available to help address any continuing issues that resulted from this incident. Again, we apologize to our customers, and we pledge to be better.*

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# *Lawsuits*

*General*

*We cannot comment on ongoing litigation, but [company] is committed to [statement that does not divulge information or opinion about lawsuit].*

*Employee or Hiring Discrimination*

*We cannot comment on ongoing litigation, but we want to emphasize that [company] is an equal opportunity employer and that we [consider all applicants/evaluate all employees] without regards to race, color, religion, national origin, age, sex, marital status, ancestry, physical or mental disability, veteran status, gender identity, or sexual orientation.*

*Sexual Harassment*

*We cannot comment on ongoing litigation, but we wish to emphasize that [company] sees providing a safe and inclusive workplace for all employees as imperative. We thank the [people/person] who displayed the courage to speak out and will be working with [him/her/them] to offer support and provide assistance during this time.*

*Accusations*

*Employee or Hiring Discrimination*

*We take diversity and inclusion seriously at [company]. We are an equal opportunity employer and [consider all applicants/respect all employees] without regards to race, color, religion, national origin, age, sex, marital status, ancestry, physical or mental disability, veteran status, gender identity, or sexual orientation. Our goal is to ensure that we are providing a safe and inclusive workplace for all employees. As such, we are actively and seriously reviewing [this claim/these claims] to determine the appropriate next steps.*

*Sexual Harassment*

*At [company], we believe that all employees should treat each other with respect. We stand with any individual who has the courage to speak out when those values are not honored. Our goal is to create a safe and inclusive workplace for all. We are actively reviewing [this claim/these claims] to determine the appropriate next steps, and are offering our full support to the [person/people] who came forward.*

*Active Shooter / Violence on Site*

*There is [suspicion/confirmation] of an [active shooter/bomb/threat] onsite at [company]. Our priority is the safety of everyone onsite and in the surrounding area. We are communicating and working with authorities to contain and resolve the situation, and ask everyone to refrain from contacting or visiting our [address/specific] location until authorities confirm it is safe to do so.*

*Unexpected Loss of CEO/Executive (Death)*

*We are saddened to announce that [name] has passed away. Amidst this time of tragic loss, our focus right now is on supporting the people closest to [him/her], our employees, and all of those affected by [his/her] passing. [Insert name], who had the benefit of working closely with [name], will be serving as interim [Title of deceased].*

*Unexpected Loss of CEO/Executive (Unexpectedly Quits/Resigns)*

*[Name of employee] has resigned from [his/her] former position at [company] as [title], effective [date]. [name] will assume the position of [title] on an [interim/permanent] basis. We believe this transition will aid us in achieving our mission as a company. We wish nothing but the best for [resigned employee] and [his/her] successful and prosperous future, and we thank [him/her] for [his/her] [months/years/decades] of dedicated service to [company].*

*Unexpected Loss of CEO/Executive (Removed from Role)*

*[Company] can confirm [employee] is parting ways with the company, effective [date]. [Optional: If this termination is due to a public crisis, such as harassment or illegal activity, mention that his/her behavior was unacceptable at the company, and to protect the integrity of your company, he/she was removed from his/her position]. We have officially named [name] as [interim/permanent] [title]. We believe this transition will aid us in achieving our mission as a company. [Optional: If this termination is due to a public crisis, such as harassment or illegal activity, mention that the company is actively reviewing the situation and what steps will be taken to ensure this does not happen again].*

*Major Offensive Statement or Action by Employee*

*When There is Evidence (Video, Image, or Audio)*

*The viewpoints expressed by this employee do not represent [company’s] values at all, and we empathize with those hurt, upset, and disturbed by the employee’s [words/actions]. We emphatically denounce what [employee] has [said/done], and as a result, [his/her] employment has been [terminated/suspended/placed under review]. We are determined to provide a safe and inclusive work environment at [company] and are working with our [people operations/human resources/executive/legal] team(s) to determine the best course of action. Again, we wholeheartedly apologize to [person/people] affected.*

*When There is Only an Accusation*

*[Company] is committed to being a safe and inclusive workplace for all. We’re still assessing the situation and these accusations. We want to understand what happened, and our next step will be to work with our [people operations/human resources/executive/legal] team(s) to determine the best course of action. In the meantime, we would like to offer our sincerest apologies to all of those affected or upset by these accusations.*

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How to Use This Template

This template should be used once you’ve emerged from your corporate crisis. In the table, there are section prompts for you to explain how well you believe the team did in responding to the crisis and why.

Once complete, have the crisis response team speak about why certain marks were achieved and what can be done to improve them in future instances.

***Post-Crisis Self-Rating Template***

*Have all members of your crisis communication and management team fill out this assessment. Rate your perceived performance for* ***first response*** *and* ***follow up*** *from 1-5, giving reasons as to why you ranked your performance this way. If you feel there are any learnings that can be applied for the next situation, document them in the* ***next steps*** *column.*

|  | ***First Response*** | ***Follow Up*** | ***Next Steps*** |
| --- | --- | --- | --- |
| ***Prompt****Did we respond quickly?* |  |  |  |
| ***Informative****Did we address the basic information needs for internal and/or external stakeholders?* |  |  |  |
| ***Sincere****Did we respond with humanity and care, showing empathy for people impacted by the crisis?* |  |  |  |
| ***Honest****When known, did we clearly explain what happened, what is happening, and what will happen next?* |  |  |  |
| ***Humble****If applicable, did we as a company own our mistake?* |  |  |  |