



# CRISIS COMMUNICATION *MESSAGING BEST PRACTICES*

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## Overview

After any disaster or crisis occurs, during the after-action debrief (you *do* hold an after-action debrief, right?), “communication” almost always comes up as the number one area that needs improvement. It is the most commonly referenced area that needs to be improved in the majority of organizations, even when there hasn’t been an incident. “Communication” is, of course, a broad topic; however, there is one comment that is probably heard more than any others after an exercise or an incident: “Communications need to be more timely.”

The communication goal during any incident is to get the:

- *Right information* to the
- *Right people* at the
- *Right time* so they can make the
- *Right decisions* and issue the
- *Right communications*.

There are four areas to focus your attention if you want to have more timely AND effective communications and achieve the communication goal stated above:

1. Communication governance document.
2. Crisis communication plan.
3. Pre-written and approved templates.
4. Effective communication tools.

Let’s dig into each of these four areas and see what you can do to achieve this long sought-after and elusive goal.

## Governance Document

As the name implies, a communication governance document clearly spells out authorities and approvals. What often gets in the way of timely communication is determining who drafts the communication, who has the right to edit them, and who has the final approval. If you can figure this out in advance AND if management endorses it, you are on your way to issuing timely communications. The governance document has two parts: Communication authority and approvals and a communication matrix.

### Communication Authority and Approvals

We divide communication approval authority into three categories of messages:

1. Emergency response message: Issued immediately at the time of an emerging life-safety issue. Examples might include public address announcements that would accompany a fire alarm, lock-down, or other urgent issue that requires immediate response in order to save lives.
2. Tactical message: General incident communications, factual information, instructions, and basic incident talking points. Examples include activation instructions, incident information, or status line updates.
3. Strategic message: Broader, longer-term policy and relationship issues. An example might be other sector companies and all media (traditional and social) communication.

An example of communication authorities and approvals might look like this:

Type	Nature	Who Develops	Who Edits	Who Approves
Emergency	Issued immediately at the time of an emerging life-safety issue.	Security	Security	Security
Tactical	General incident communication, factual information, instructions, and basic incident talking points.	Comms.	Comms.	Incident Commander
Strategic	Broader, longer-term policy and relationship issues.	SVP of Comms.	SVP of Comms.	Executive Crisis Mgmt. Team

These three categories of messages should be tied to your company incident levels. Our clients most commonly have three levels of severity, Level One, Level Two, and Level Three. Most communication usually deals with the two most severe levels.

Once you organize your messages into the three categories, review the following for each category: Who writes the messaging, who has the right to edit it, and who approves it. Once this is completed, it must be reviewed and approved by senior management. At the time of a crisis, immediately pull out those agreements to manage the communication process.

### *Communication Matrix*

The communication matrix clearly details:

- **Who** the stakeholders are.
- **Who** “owns” the relationship.
- **How** you communicate with them.
- **When** you communicate with them (what level).
- **What** the first message is.

This matrix can be as specific or as general as you feel it needs to be. It will be used as a guide to remind you of who is communicating to whom. It might look like this:

Stakeholder	Owner	Communications Tools	When to Communicate
Employees	HR	Email, voice, text, employee hotline, Facebook	Level 2 and 3
Investor Community	Investor Relations	Email, voice, website	Level 3
Vendors	Purchasing	Email, voice, text, website	Level 2 and 3
Media	Communications	Email, voice, text, website, Facebook, Twitter, press release	Level 2 and 3

## Crisis Communication Plan

A robust Crisis Communication Plan will contain the following components:

- Roles and responsibilities of all team players.
- Communication authorities for messages:
  - Develop, edit, and approve.
- Communication matrix:
  - Identification of key stakeholders, owners, tools, and a first message.
- Communication process:
  - Gather, develop, and disseminate.
- Template communications.
- Appendix:
  - Necessary forms to complete activities.
  - Contact information for team and their stakeholders.

## Team Roles and Responsibilities

Clearly detail the roles and responsibilities of the Communications Team Leader as well as the team members. Team roles often include:

- Develop, coordinate, and disseminate accurate and timely information related to the incident.
- Respond to inquiries from the news media and the public.
- Monitor the media (traditional/social) to detect and correct misinformation and to identify emerging trends or issues.
- Advise the Incident Commander and executives on public information issues, recommending communication, and advise on what to report to stakeholders.

In many companies, there is more than one group of individuals who communicate to the many different stakeholders (this would be documented in the communications matrix). Think of all of them in your company and be sure you have thought about how they will all know what the approved talking points and messages are and when they should be used. Some companies add members to the Communications Team from other departments with communication responsibilities. Those other departments could include:

- Public Relations.
- Human Resources.
- Investor Relations.
- Government Affairs.
- Key lines of business.

## Communication Process

Another key part of the plan is to document the process of getting information to the stakeholders during an incident. This is an ongoing cycle that involves three steps:

- 1) *Gather* and *Verify* information. Where do you get your information (sources)? How do you verify and validate that it is correct? Who does that on the team?
- 2) *Develop* and *Coordinate* information. There are two parts to this key step:
  - a) Develop key message(s) by prioritizing information to get out to the public; develop all talking points and all communication.
  - b) Obtain approval/clearance from those in authority to ensure that the information is accurate, complete, and current. This should be detailed in the communication governance document.
- 3) *Disseminate* information and *evaluate*. The final step in the process is to disseminate the information to the key stakeholders using the pre-identified tools

and methods and then evaluating the response. In other words, determine if your main message is getting out.

## Appendix

The appendix contains a variety of documents that facilitates the communication process. This could include:

- Documented meeting locations (physical and virtual).
- Any necessary forms.
- Contact information:
  - Media.
  - Vendors.
  - Employees.
- Strategies to communicate in the possibility of:
  - No power.
  - No internet.
  - Loss of email.

## Pre-written and Approved Templates

This is one area that we often find missing in communication plans: Pre-written AND pre-approved communication templates. There should be pre-written and pre-approved wording for every form or tool that you plan to use, whether it be email, voice messaging, texts, Tweets, Facebook posts, web page displays, press releases, whatever.

At a minimum, your template communications should contain your first messages for all of the identified stakeholders for a Level 2 and Level 3 incident using the appropriate channels that you have already identified.

You may think it's impossible to craft a message for an incident that hasn't happened yet. Think again.

Two samples of different employee communication might look like this:

- A *<<fill in the incident>>* has just occurred. We are investigating the situation to determine next steps. For your safety, please stand by. We will have information for you in 10 minutes or less.
- Business continuity plans have been activated. Evacuate the office, take with you what you need to work from home for the remainder of the *<<day/week>>*. We will post additional information on the employee portal in *<<note timeframe>>*.

Pull out the communication matrix in your communication governance document and note all of the stakeholders. Think about the initial messages that need to be crafted and delivered for each of the groups. Determine other messages that might be needed for events that could likely occur. Craft them all, review them, and get them approved now.

In the midst of a crisis, it's much easier to look at a piece of paper with words and thoughts already crafted than to stare at a blank screen or piece of paper. Timely communication starts with pre-written and pre-approved templates.

## Effective Tools

Do an inventory of all of your possible communication tools. Determine what tools you will use in the crisis. There is a wide array to choose from, and there are likely some that you might not have even thought about. Be creative and list them all:

- Public address system.
- Posters and flip charts in public places like lobbies.
- Voice calls: Work, home, and mobile phones.
- Email: Work and home email addresses.
- SMS/text.
- Company website.
- Traditional media.
- Social media, such as FaceBook, Twitter, LinkedIn, and Instagram.
- Emergency notifications system (ENS) that can reach:
  - Mobile phone (calls and SMS messages).
  - Office phone.
  - Home phone.
  - Work and home email.

Virtual options for the Communications Team to work remotely are important to choose, develop, and train for in advance. Conference call bridges are the old standard, but there are many new and emerging virtual options for team collaboration. Investigate them in advance, select one, and practice! Some options to consider include:

- Electronic collaboration tools:
  - Slack, Yammer, Invision, Google Keep.
- Webinar platforms:
  - GoTo Meeting, WebEx.
- Online learning management systems (LMS):



- Adobe Connect, Blackboard.

## Successful Crisis Communications

Think of an effective communication process a bit like a math addition problem:

- Governance Document +
- Crisis Communication Plan +
- Pre-written and Approved Templates +
- Effective Communication Tools =
- *Crisis Communication Best Practices.*

You need all four to make it work.

To move forward and have successful crisis communications you need to:

- Get executive sponsorship! Your management needs to support this effort.
- Understand existing day-to-day processes. Know what you have in place now.
- Develop the communication governance document. This is the guide and the tool to streamline the entire communications process.
- Develop plans and materials. Develop the crisis communication plan and templates.
- Train all members of the Communications Team and consider recruiting other company communicators to join the team. Everyone needs to know what to do in advance and consider bringing all of the communicators together.
- Train all members of the Command Center on the communication process. Make sure that everyone in your company Command Center knows about the communication process.
- Practice, practice, practice. Exercise the team regularly and conduct after-action reviews after any real incident. Use any opportunity to improve the process and the team. Develop your muscle memory!

Get started today... Your next crisis might be around the corner!



## About the Author



Regina Phelps is an internationally recognized expert in the field of emergency management and continuity planning. Since 1982, she has provided consultation and educational speaking services to clients in four continents. She is founder of Emergency Management & Safety Solutions, a consulting company specializing in incident management, exercise design, and continuity and pandemic planning. Clients include many Fortune 500 companies. Ms. Phelps is a frequent top-rated speaker at well-known conferences such as the Disaster Recovery Journal, CP&M, and the World Conference on Disaster Management. She is frequently sought out for her common sense approach and clear, clean delivery of complex topics.



## About Everbridge

Everbridge, Inc. (NASDAQ: EVBG) is a global software company that provides enterprise software applications that automate and accelerate an organization's operational response to critical events in order to keep people safe and businesses running. During public safety threats such as active shooter situations, terrorist attacks or severe weather conditions, as well as critical business events such as IT outages or cyber-attack incidents, over 3,400 global customers rely on the company's SaaS-based platform to quickly and reliably aggregate and assess threat data, locate people at risk and responders able to assist, automate the execution of pre-defined communications processes, and track progress on executing response plans. The company's platform sent over 1.5 billion messages in 2016, and offers the ability to reach over 200 countries and territories with secure delivery to more than 100 different communication devices. The company's critical event management and enterprise safety applications include Mass Notification, Incident Management, IT Alerting, Safety Connection™, Community Engagement®, Visual Command Center®, Crisis Commander® and CareConverge™, and are easy-to-use and deploy, secure, highly scalable and reliable. Everbridge serves 8 of the 10 largest U.S. cities, 8 of the 10 largest U.S.-based investment banks, all four of the largest global accounting firms, all 25 of the 25 busiest North American airports and 6 of the 10 largest global automakers. Everbridge is based in Boston and Los Angeles with additional offices in San Francisco, Lansing, Beijing, London and Stockholm. For more information, visit [www.everbridge.com](http://www.everbridge.com), read the company [blog](#), and follow on [Twitter](#) and [Facebook](#).