Introduction

To be successful in a crisis, it requires preparation. And being prepared requires two things from each and every one responding:

1. They must be in a constant state of readiness. Since we usually don’t know the precise nature (timing, location, specifics required at the time) of the crisis, we always have to be in a constant state of readiness, as near to instantaneous as possible. Think in terms of “instant-on.”
2. They must have a wide-range of contingencies at their disposal to be prepared for many possibilities.

And in some cases, despite prior training, plans, experience, and exercises, what we have and what we do may still not be enough.

Do You Plan for the “Worst Case?”

One of the things I often hear continuity and emergency professionals say is that they “plan for the worst-case scenario.” Whenever I hear someone sat that, I immediately stop them; this is simply not true. Continuity professionals don’t plan for the worst-case scenario, they plan for what they think will happen, what is called a “routine” emergency. What they plan for may be a really bad situation, but there is not enough time, money, or risk appetite for anyone to plan for the truly worst-case scenario.

“Routine” Emergency

To be clear, routine emergency1 does not mean "easy." A routine emergency can still be difficult and challenging. In this context, “routine” refers to the relative predictability of the situation that permits advanced preparation. This risk is in the company’s risk profile and the company is likely to have been able to take advantage of lessons learned from prior experiences. Continuity professionals are likely to have thought about what to plan for and what is needed, and they have probably trained for them and done exercises for them. Incident management, crisis communications, business continuity, and disaster recovery plans are filled with strategies to manage routine emergencies.

1 Managing Crisis: Responses to Large-Scale Emergencies, Arnold Howitt and Herman Leonard, CQ Press, page 5.
“Crisis” Emergency

A crisis emergency\(^2\) is a much different animal. These types of events are distinguished by significant elements of *novelty*. This novelty makes the problem much more difficult to diagnose and then deal with. This type of emergency can have the following characteristics:

- The threat has never been encountered before, therefore, there are no plans to manage it.
- It may be a familiar event, however, it is occurring at unprecedented speed, therefore developing an appropriate response is severely challenging.
- There may be a confluence of forces, which, while not new individually, in combination, pose unique challenges to the response.

The novel nature of a crisis emergency becomes a game-changer. Plans, processes, training, and exercises that may work well in routine emergency situations are frequently grossly inadequate in a crisis emergency, and may even be counterproductive. Companies realize that they have to start their response from scratch.

The first thing that must be done is to *identify* the elements of the novelty; determine what makes this situation so different from others. Companies begin the process thinking the situation is one thing, and then over time, realize it turned out to be something quite different. For example, you may think you are dealing with a routine problem or outage; over time, you see it is something more significant and sinister.

Once the real problem has been identified and it’s understood that the routine plans won’t work, response measures must be improvised that will be suitable to cope with the unanticipated aspects of the incident. In other words, you’re in new territory; this hasn’t

been done before. Handling a crisis emergency may feel like you’re building an airplane while flying it at the same time. It’s not pretty, but it may be necessary.

Lastly, in a crisis emergency, you must respond in creative ways and, at the same time, be extremely adaptable executing these new and improvised solutions. You have to be on “full alert” at all times, as you don’t know how the situation will change, and you must be prepared to shift or dart at a moment’s notice. All of this can make people quite anxious.

**Seven Essentials Required to Manage a Crisis**

Leaders need many skills to manage a crisis. We believe it is essential that they are able to do these seven actions during the crisis:

1. Gain situational awareness.
2. Improvise.
3. Are creative and adaptable.
4. Be decisive
5. Communicate.
6. Take action.
7. Reevaluate

**Situational Awareness**

Situational awareness is perhaps one of the most critical skills in a crisis. Situational awareness is the ability to identify, process, and comprehend the critical elements of information about what is happening to you and your organization in relation to the crisis. More simply, it’s knowing what is going on around you.
First, begin by gathering and assembling the key facts of the incident. This is often under conditions of great confusion and uncertainty. Information may be confusing or conflict with other sources. You need to obtain situational awareness from multiple sources. Some of those sources might be:

- Media – traditional and social.
- Emergency responders.
- Employees and contractors.
- Vendors.
- Customers.
- Government agencies.
- Other people you may have at your disposal.

You need to then carefully decide:

- How you will gather the information and who does it.
- How you will process the information.
- How you will display and communicate that information to the key players.

These are great things to work out in advance, and then practice in an exercise.

In addition to obtaining the information, decision-makers must take in the data and "project forward" the implications of the information they acquire and anticipate possible consequences of a fast-changing and still-moving incident. That means that as part of this skill, they must generate possible alternative courses of action and assess which of them holds the most promise of dealing with the situation.

**Improvise**

In a crisis, often after leaders review the new-found situational awareness and then review their routine plans and checklists, they find that their response is not adequate. They determine that customization is required. The presence of significant novelty calls into question whether routine plans will work. The situation may require unplanned and unrehearsed actions.

In a true crisis, leaders, often under extreme pressure and with high stakes and compressed timelines, must formulate a new approach to the situation. They then execute new responses or a combination of responses to manage the crisis. In other words, leaders must improvise in order to develop an adequate response.
Creativity and Adaptability

A crisis requires approaching new problems with new thinking – creative and adaptable responses. Leaders must find ways to see and appreciate the novel elements in a crisis. While this may be difficult to do in the heat of battle, hopefully, you have practiced this in your exercises. Some of the ways to foster creativity and adaptability include:

- Focus attention on the novelties, think about what is new about this particular situation. People are drawn to the familiar. Don’t just ask "What about this is the same?" ask "What is different?"
- Ensure that diverse viewpoints are heard. Have a mixed team with a variety of backgrounds and experiences. Homogenous teams may not deliver the best results.
- Systematically require additional thought. Is the set of possibilities large enough at the beginning? Look for one or more best alternative explanations. Consider a "Team B" approach. (“Team B” is a separate team of highly skilled individuals looking over the shoulder of the primary team, and looking at their plans from multiple angles. They act as a secondary planning team but without the pressures of the crisis. This team can often spot issues that the primary team can’t and can bring new thinking to an old problem.)

A leader/team must adapt rapidly to a fast-changing crisis. By its nature, a crisis changes quickly and the first response will likely not be the final response. A critical thing to remember is that in a crisis situation, the leader cannot be wedded to a single strategy. They must continue to take in new information, listen carefully, and consult with frontline experts who know what's happening. In other words, “don't fall in love with your own solutions and ideas.”

Decisiveness

This is the moment of truth. Someone must make a decision. We have all known leaders who struggle to make a decision. That situation is a disaster in the middle of the crisis.

Once situational awareness has been reviewed, AND the response has been improvised, AND creativity and adaptability have been exercised, THEN the leader must make a decision. If, after a while, it becomes apparent the wrong decision was made, make another one. The role of the leader is to keep the team and the company moving forward.
Sometimes leaders are reluctant to make the decision because they don’t have complete information. Unfortunately, all of the information may not be available until the incident is long over. When things are happening quickly, no one can have actual control of the situation, but a leader can assume control. In other words, *the disaster can’t be controlled, but the response can be.* The leader’s job is to assume the mantle of leadership and, well, lead!

**Communication**

I don’t think I have ever heard anyone say in a major crisis, “my company communicated too often with me.” That will never happen! What is needed in any crisis is clear, crisp, concise, and timely communication. This is absolutely essential.

Set realistic expectations for communication, and then communicate early and often. Of course, you don’t want to alarm people, but don’t be afraid to speak to the magnitude of the situation. People need to hear what is going on, even if the news is not good. And be sure to remember to use all forms of communication, including social media. In our current age, a Twitter or Facebook post is often picked up and seen by millions and often instantaneously. Remember the United Airlines fiasco in April 2017? Ouch!

When reviewing your communications plan, be sure it includes:

- Who the stakeholders are.
- What tools are used to communicate?
- Who communicates with the stakeholders (i.e., who owns the relationship).
- What the message is.

If you put this information into a communications matrix, it will clearly tell you who needs to be communicated to, the tools that will be used, who does that communicating, and what will be said in the first message.
**Action**

This is the moment of truth: Do what you have committed to! You have made the decision, now do it. At this point it’s time enact the plans and observe the response.

One critical aspect of taking action is to ensure that there are sufficient feedback loops to assess response to the new plan and adjust accordingly. You need to keep checking in and determine how you are doing. At the same time, take in new situational awareness information, and adjust accordingly.

A word of warning: Be aware of the dangers of cognitive bias. Cognitive bias is always present but can raise its ugly head at time of crisis. It represents the deviation from rational thinking or good judgment. These are some of the cognitive biases that tend to appear in crisis situations:

- **“Know-It-All.”** Overweighing one's experience. ("Been there, done that.")
- **Illusion of experience.** A tendency for individuals to think that they have more experience than they actually do.
- **Overconfidence.** In one’s abilities and in one’s ability to predict the future. Belief that can control the future.
- **Failure to observe** or believe disconfirming evidence.
- **Escalation of commitment.** Once it’s noticed that it is not working, people recommit to the solution.
- **Bandwagon effect.** The tendency to do or believe things because many other people do or believe the same.

We have all seen people in a command center with these traits, perhaps we even see ourselves in that list at some time. If you start hearing people say, “don’t worry, I know how to manage an earthquake,” start to worry and keep your eye on them.
Reevaluate

Lastly, be prepared to do regular assessments at set intervals to reevaluate and reassess progress. This gives you the ability to tweak (or do a major overhaul of) the plan. Ask these questions over and over (this is a good place for "Team B" to chime in):

- "How are we doing?"
- "What are we missing?"

As you are assessing progress, be sure that you are always aware of and check for cognitive bias in yourself and your team, and measure performance against your objectives. Once you know how you are doing, then you need to recommit to your plan, tweak it, or redesign it. The key thing is to keep the group moving forward.

Going Forward

Take time now to review these key elements with your leadership and crisis management teams. Design exercises that allow them to practice these skills and to build muscle memory. Remember the famous quote from Thomas Edison when asked to speak about creativity:

"If we all did the things we are capable of doing, we would literally astound ourselves." This simple statement recognizes a primary law of human creativity, namely, the great potential hidden in each of us.

Work with your team now to develop these skills, so in that next crisis, they will astound themselves.
Biography

Regina Phelps is an internationally recognized expert in the field of crisis management, exercise design, and continuity planning. Since 1982, she has provided consultation and speaking services to clients in four continents. She is founder of Emergency Management & Safety Solutions, a consulting company specializing in crisis management, exercise design, and continuity and pandemic planning.

Ms. Phelps conducts over 100 exercises per year for her large multi-national clients. She has lectured extensively at international disaster and business continuity conferences. She is the author of three exercise design books: *Emergency Management Exercises: Exercise Design, From Response to Recovery, Everything You Need to Know to Create a Great Exercise; Emergency Management Exercises: The Instructor’s Guide;* and her latest, *Cyber Breach* (released March 2016). Ms. Phelps has also designed college-level courses in exercise design, written numerous papers, and has given hundreds of lectures on the topic.
About Everbridge

Everbridge, Inc. (NASDAQ: EVBG) is a global software company that provides critical event management and enterprise safety applications that enable customers to automate and accelerate the process of keeping people safe and businesses running during critical events. 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 incidents, over 3,000 global customers rely on the company’s SaaS-based platform to quickly and reliably construct and deliver contextual notifications to millions of people at one time. The company’s platform sent over 1.5 billion messages in 2016, and offers the ability to reach more than 200 countries and territories with secure delivery to over 100 different communication devices. The company’s critical communications and enterprise safety applications, which include Mass Notification, Incident Management, IT Alerting, Safety Connection™, Community Engagement™, Secure Messaging and Internet of Things, 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, 24 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.

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