

# TEAM PLAYERS

A great crisis management team begins with clearly defined roles, knowledge of incident assessment criteria and following an incident planning process

By Regina Phelps

I am often asked what makes a great Crisis Management Team (CMT). For a team to be great, I believe, they must have these three elements: 1) Clearly identified roles and responsibilities; 2) Established incident assessment processes and a team with the authority and responsibility to activate the plan and the team; and 3) Proactive incident action-planning processes.

**Clearly identified roles and responsibilities:** Companies need to know not only who is on the team but also what each team member's exact role and responsibilities are. This doesn't need to be fancy or complicated. Simply document this

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on a checklist, noting main tasks at time of activation, during the operation and when the team is deactivated. You might think this seems like a waste of time because the person should know their job, but not so fast — a team member's “disaster-job” is not their “day-job.” There are some good reasons why a checklist is a great idea:

- The situation may have really



- rattled the team member, and they need something to point them in the direction of their crisis management job.
- They may be the third or fourth person called in to do the job, and their training for the position may be out of date or non-existent.
- Everyone on the CMT is likely to appreciate a checklist just to make sure everything got done.

## Established incident assessment processes and team:

Which team examines the incident and determines whether the CMT and plan should be activated? In many companies, this is usually a small group — five to seven people — who know they are on the team and have regular exercises to practise the assessment processes. Members of this team often come from facilities, technology and security departments and may include the incident commander and a few others. When the team gets together, they should discuss the incident and ask the following questions. Is there a:

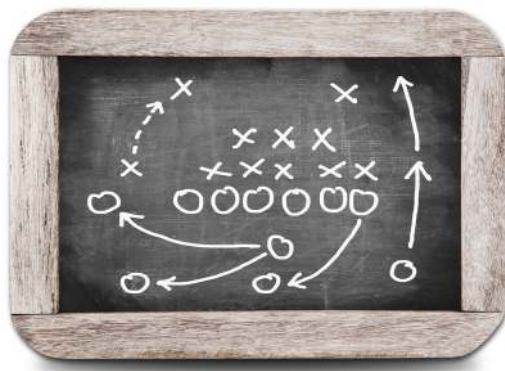
- Life safety issue? Are people at risk?
- Facility impact?
- Technology impact?
- Mission-critical impact?
- Reputation or brand impact?

Each of these five potential impacts should be discussed in light of the incident. At the end of that discussion, don't make assumptions about the decision. Ask the question of the team out loud: "Should we activate?"

## "Don't make assumptions. Ask the question of the team out loud: Should we activate?"

**Proactive incident action-planning processes:** Once the team has made the decision to activate, an Incident Action Plan (IAP) must be developed. This is one of the hallmarks of the Incident Command System (ICS) and is essential for the group to succeed. An IAP contains the following information:

- The situation status, also called "situational awareness." The person who knows the most



about the incident should provide status about it. The situation, and the person who knows the most about it, is likely to change over the course of the event.

- Strategic objectives. Think of these as a "to-do" list. The objectives should be clear, short and concise and ideally start with an action-oriented verb ("Do," "Get," "Compile," "Develop," etc.).
  - o Each objective should be assigned to a specific person. This person may not personally perform the tasks but is responsible for making sure that they get done.
- The next Operational Period (OP). An OP is the time that the team members work on the objectives before coming back to give status and regroup. At the beginning of an incident, the OP might be short, perhaps several hours. As the incident matures, the OP is often eight to 12 hours long.

An IAP should be in writing and can then be shared with anyone

who needs to know what is going on. It can be turned into a PDF and sent to any location, entity or individual necessary. Once the IAP has been completed, it is then the logical time to brief the executives and prepare communications to the key stakeholders, telling them what is going on and what the company is planning to do about it.

In the end, these three simple characteristics are the heart and foundation of a well-crafted Crisis Management Plan. They can also be used to design simple, short tabletop exercises to train the team and refine the plan and processes.

Go back and look at your plans. If you have these three characteristics clearly identified, your team will be able to quickly assemble, assess, activate and move forward. If you don't have them, you are in trouble before you have begun. So develop them now, and train your team. **EM**

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