



The Essential Crisis and Risk Communications Checklist

In any crisis communications situation, three basic principles should guide your actions:

One – Be honest and stick to the facts. Do not speculate, hypothecate or exaggerate. Those impacted by the crisis deserve nothing less – and your reputation may be damaged irreparably if you aren't truthful and authentic.

Two – Think strategically about the long-term. It is too easy to be reactionary, get caught up in the grinding short-term pressures of the situation and scurry to respond to those demanding answers from every quarter. What do you stand for? What are your core values? Are your responses to the crisis consistent with these values? How will your actions today be viewed a year from now? Five years from now?

Three – Maintain unified and consistent communications during implementation of your plan. Nothing will erode your credibility faster than conflicting messages coming from different sources within your organization (be aware that the media – and class action attorneys in some cases – will pursue every angle in search of controversy, unethical behavior or criminal intent).

Most major organizations create crisis plans in advance of need, update regularly, create tools and tactics (hidden Web sites, video, audio, fact sheets, media kits) and even rehearse their responses. The better job you do before a crisis strikes – or at the beginning of the crisis should you not have a plan in place – the better the result. As a starting point for creating your own plan, here is a detailed checklist to guide your organization through the essential elements required. Depending on each crisis, some areas may require more research, planning and action than others. Assemble your crisis team and begin:

I. Instant Research -- Assessing the Nature of the Crisis

- A. Sources of the crisis alert
- B. Urgency of the response (internal, external)
- C. Quick read on the extent of the problem
 1. Who or what is impacted?
 2. How?
 3. What is the level of urgency and immediacy?
 4. What actions can we take now that will lessen the impact?
 5. What are the consequences of acting? Of not acting?
 6. Could the situation get worse? How can we prevent this?

- D. Define and Analyze Potential Impacts
 - 1. life threatening, deaths, catastrophe
 - 2. public safety
 - 3. financial, liability, law suits
 - 4. internal events
 - 5. governmental actions
 - 6. supply chain disasters
 - 7. industry disasters
 - 8. natural disaster
 - 9. media hit piece
 - 10. competitive attack
 - 11. financial market turmoil
 - 12. consumer activist attack
 - 13. hostile takeover
 - 14. other influences
- E. What do we need to do in terms of communicating about the crisis?
 - 1. What are our legal obligations? Do we need to inform law enforcement? Regulatory agencies? Other government agencies?
 - 2. What are our ethical obligations? Do we need to inform our customers? Stockholders? Business partners?
 - 3. What is the best way (and time) to let these groups know?
- F. What questions do we need answered and what resources can we use to get answers to those questions?
- G. Identify most urgent need – emergency action if required
 - 1. immediate notifications
 - 2. instant media response/alert
- H. If you already have a comprehensive plan in place, review and implement accordingly

II. Alert the Team

- A. CEO
- B. Key Managers
- C. Public Relations
- D. Security
- E. Legal, Accounting, HR
- F. Outside Experts

III. Plan Your Response

- A. Detailed situational analysis from the team
- B. Gather facts, data
- C. Confirm and re-confirm that facts are indeed facts and that no speculation is involved.
- D. Identify critical "need to know" audiences
 - 1. employees, their families
 - 2. public authorities
 - 3. fire, police, sheriff
 - 4. customers, suppliers
 - 5. media

6. community members, community and elected leaders
 7. shareholders, SEC
 8. other regulators, agencies
 9. strategic partners
 10. other audiences, constituencies
- E. Level of response required for each
1. assignment of individual follow-up actions
 2. timing (based on level of immediacy, urgency)
- F. Documentation plan in place to track timing of actions, events

IV. Implement Your Communications Plan

- A. Assign a Designated Spokesperson
1. single point of contact
 2. designated back up
 3. rehearse prior to making any public statements. (Note: the hour or two you commit to practicing in front of your team, taking Q&A, refining the messages and preparing for the worst could be the most valuable hour or two you've ever invested in the future reputation of your organization.)
- B. Internal Alerts
1. initial briefing, brainstorming for the management team, crisis team; launch internal updates via Intranet, email
 2. ensure that all queries are referred to the designated spokesperson
 3. issue a brief internal statement, or summary, if required; clear through management since any document could become public
 4. provide frequent, timely updates of actions, as needed
- C. Media Relations and Communications with Other Audiences
1. Identify most urgent need – control flow of information, prevent leaks, and focus efforts on solutions
 2. For all other activities, analyze the facts and determine "need to know", depth of information required, if any (in some cases, no action with the media is the best action); stress full cooperation with the media, even if there is no new information available; be responsive even in saying "we are still gathering information and will get right back to you"; post to the Web immediately with a time and date stamp so everyone knows what is the latest information
 3. Have pre-approved briefing materials, update and double check to ensure accuracy; be concise; avoid speculation
 - a. news release
 - b. fact sheet, Q&A
 - c. background
 - d. provide the spokesperson's phone, fax, pager, cellular numbers to the media, as required
 - e. provide "B Roll" video to television media in lieu of giving facility tours
 - f. launch your organization's prepared crisis Web site, use as focal point, if one was developed; provide immediate updates to the Web site as the primary source of timeline information

- g. ongoing photography and video documentation; post to social media and on-line sites (YouTube, Flickr, FaceBook, Twitter, FriendFeed, LinkedIn) as determined appropriate

D. Media Relations Management

1. Determine if a news conference is necessary
 - a. identify location
 - b. set time
 - c. stage it appropriately (lighting, backdrops, lectern, sound system, chairs)
 - d. identify additional spokespeople, if required
 - e. send out media advisory announcing the conference
 - f. prepare announcement, script, rehearse
 - g. video and audio tape, for the record
 - h. distribute news release via paid wire service, email and fax to key media, post on Web site, update details, use a time and date stamp; if CEO and company have blogs, consider the pros and cons of blogging about the crisis.
 - i. consider a Webcast for the record, audio, podcast
 - j. post video to YouTube, photos to Flickr, once the crisis has subsided
2. Control Access
 - a. designate a central "press room" if appropriate
 - b. if the media require a site tour, plan and stage it accordingly
 1. specific route
 2. designated spokesperson, tour guide
 - c. maintain logs of media contacts: date, time, person, media, request, deadline, action, timing
3. Timely Dissemination
 - a. Web site update with time and date stamp
 - b. e-mail
 - c. conference calls
 - d. PR Newswire, Business Wire
 - e. Web casts, Pod casts
 - f. Video news releases
 - g. RSS feeds
 - h. Blogs
 - i. YouTube, Flickr
 - j. Twitter
4. Monitor coverage
 - a. video monitoring service
 - b. staff review of daily media
 - c. electronic clipping services
 - d. monitor Dow Jones, other wires
 - e. monitor Blogs, Twitter; respond as needed
5. Review results
6. Follow up, adjust, fine-tune messages

- E. Debrief, Analyze, Update Crisis Plan
- F. Schedule Future Rehearsals, Adjustments
- G. Celebrate!

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