



Crisis Communication Strategy Worksheet

Crisis is inevitable for just about any type of organization. A crisis strategy provides a roadmap for organizations to navigate turbulent times, safeguard their interests, and emerge stronger from challenging situations. This worksheet will help you create a proactive approach that contributes to your organization’s resilience and adaptability in an ever-changing business landscape.

Pre-crisis Phase

Identify Potential Crises and Develop a Possible Plan

Brainstorm Potential Crises in Advance: The Crisis Communications Team should identify every potential threat based on your known vulnerabilities. It may become clear that some crisis situations may be preventable by shifting existing conditions or operational methods. You should consider possible responses, and best and worst case scenarios. Often organizations are aware of an upcoming event like layoffs, a merger or a move, so you can begin to plan well in advance of the actual event.

ADVANCE CRISIS PLANNING	
POTENTIAL SCENARIOS	Security Breach, Product/Technology Failure, Natural Disaster, Financial Crisis, Workplace Violence, Environmental Crisis
Scenario 1	
Scenario 2	
Scenario 3	

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UPCOMING EVENTS	Mergers, Acquisitions, Moves, Layoffs
Scenario 1	
Scenario 2	
Scenario 3	

Identify People

Identify the Crisis Communications Team: Ideally, the organization’s CEO will head up the Crisis Communication Team, with members of the Board of Directors, senior executives (usually the heads of major divisions), public relations executive (or outside agency or consultant), and legal counsel as chief advisers serving alongside. Decide who should be called first, and then decide on the order of the “phone tree” to inform the team.

CRISIS COMMUNICATIONS TEAM AND PHONE TREE			
Name & Title	Role & Responsibility	Contact Information	Phone Tree Order

Identify Spokespersons: The pool of potential spokespersons/subject matter experts should be identified and trained in advance, even though you will make the ultimate decision about who will speak once the crisis breaks. Consider all the different channels of communications, both internal and external, that you may need to cover.

CRISIS SPOKESPERSONS		
Name & Title	Expertise	Contact Information

Identify and Know Your Stakeholders: Create a complete database of internal and external stakeholders to guarantee that they obtain the exact messages you want them to hear and potentially repeat to other individuals or media outlets. Use the Smartsheet Stakeholder Communication Plan Template and update it frequently. Remember that staff are internal stakeholders; include them below and think about how you talk to staff and what they are allowed to say (or not allowed to say), and how you plan as an organization to prepare your staff for a crisis.

STAKEHOLDER COMMUNICATION PLAN					
Stakeholder	Power/Interest	Key Interest & Issues	Communication Vehicle	Frequency	Comments

Initial Phase

Identify Actual Crisis And Develop A Plan

Collect Information—What, When, Who, How and Why: The first step is to determine what has happened and immediately identify and document as many facts as possible based on essential questions: What happened and has the situation been confirmed by credible information sources? What additional facts are needed to put the event into perspective? When did it happen? Who is involved? How did it happen? What is currently being done?

CRISIS VERIFICATION SYSTEM DESCRIPTION

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Crisis Communication Response Plan: Your brainstorming and assessment process should lead to the creation of a Crisis Response Plan tailored to your organization.

CRISIS COMMUNICATION RESPONSE PLAN TEMPLATE

EVENT NAME	
COMMUNICATION GOAL	
TARGET AUDIENCES	



ISSUE ANALYSIS AND VERIFICATION

What happened?	
Which credible information sources confirmed?	
What additional facts are needed to put the event into perspective?	
When did it happen?	
Who is involved?	
How did it happen?	
What is currently being done?	

IDENTIFY MESSAGING

Develop and Use “Holding Statements:” You’ll need to develop full messages based on the facts and that may take some time. Using pre-determined “holding statements,” immediately after a crisis gives you breathing space and communicates that you’re aware and working on the matter. For example: “Expect a statement from our CEO within two hours” or “Check Twitter or our website for updates.” Holding statements should be reviewed regularly.

HOLDING STATEMENT PLANNER

ACKNOWLEDGE THE CRISIS | GIVE YOURSELF SOME TIME | SHOW COMMITMENT

STATEMENT SAMPLES	DELIVERY MODALITY/MODALITIES



Key Messages: The Crisis Communications Team should aim to develop three crisis-specific messages based on verified information for all stakeholders and, if needed, some targeted messaging for specific stakeholder groups based on identified scenarios. These can be modified based on the actual crisis. Messaging will also need to be adapted to different forms of media. For example, Twitter may require links because of character limits.

KEY MESSAGE PLANNER		
AUDIENCE	TOP THREE KEY MESSAGES	DELIVERY CHANNELS & SPOKESPERSON
All Stakeholders		
Audience 1		
Audience 2		
Audience 3		

Establish Monitoring Systems: Monitoring what’s being said about you on traditional and social media can alert you to negative messages that could foment a crisis. Monitoring all stakeholder feedback during a crisis supports logical changes to strategy and tactics. Free services include Google Alerts and Hootsuite, but you can also use paid monitoring services to report results in various formats. Train personnel, such as Customer Service reps, who have front-line contact with stakeholders to immediately report to the Crisis Communications Team.

MONITORING SYSTEM DESCRIPTION

Keep Your Board Informed: In a crisis, the Board of Directors plays a critical role in guiding your organization and ensuring effective crisis management. If they are not already active members of your Crisis Communication Team, you must keep them informed so that they can:

- Provide strategic guidance on how to respond to the crisis; this may involve making difficult decisions regarding operations, communications, legal matters, and stakeholder management
- Be involved in decision-making to minimize legal risks and protect the organization's reputation, and to ensure that all actions taken during the crisis are in compliance with legal and ethical standards
- Authorize the allocation of funds or other resources as necessary to address the situation

Maintenance Phase

Ongoing Assessment of the Event and Continued Allocation of Resources

The maintenance phase generally begins when most or all of the direct harm is contained, and the intensity of the crisis begins to subside.

Communication objectives during this phase include:

- Help the public more accurately understand its own risks.
- Provide background and encompassing information to those who need it.
- Generate understanding and support for response and recovery plans.
- Listen to stakeholder and audience feedback and correct any misinformation.
- Reiterate to internal and external stakeholders the organization’s values.
- Explain emergency recommendations.
- Empower risk/benefit decision making.

Answer the following questions to help guide communication efforts during this phase:

REASSURANCE AND PLANNING		
How could this happen?		
Has this happened before?		
How can we keep this from happening again?		
Will I be all right in the long term—will I recover?		

Resolution Phase

Return to Normal or “New Normal”

The Maintenance phase and the Resolution phase often blend into one another as the crisis continues to wind down. It is important to acknowledge the resolution phase may take considerable time as details of the event and responsibility and blame are addressed.

During this time, organizations must develop a communication resolution plan for transitioning from crisis response to recovery, which may include rebuilding, reputation management, and long-term communication strategies. You may need to provide a public education campaign or make changes to public information.

Which communication methods will you address and what will the communication changes be to each?

ADDRESS IMPACT OF CRISIS AND RECOVERY MEASURES		
KEY AREA	COMMUNICATION VEHICLE	CHANGE
Public Communication	<input type="checkbox"/> Website <input type="checkbox"/> Press Releases <input type="checkbox"/> Social Media <input type="checkbox"/> Other	
Internal Communication	<input type="checkbox"/> Employee Communication <input type="checkbox"/> Training and/or Education <input type="checkbox"/> Internal Documentation	
Operational Changes	<input type="checkbox"/> Business Continuity Plan <input type="checkbox"/> Supply Chain <input type="checkbox"/> Product or Service Modifications	
Legal and Regulatory Compliance	<input type="checkbox"/> Legal Documents <input type="checkbox"/> Regulatory Compliance	
Financial Reporting	<input type="checkbox"/> Financial Statements	
Reputation Management	<input type="checkbox"/> Brand Messaging <input type="checkbox"/> Customer Relations	
Monitoring and Preparedness	<input type="checkbox"/> Monitoring Systems <input type="checkbox"/> Review and Audit	

How Your Board Can Help: The board should review and approve crisis resolution plans and provide ongoing monitoring to ensure that the plans are being implemented correctly.

During Resolution, the board should monitor effects from the crisis, such as impact on the organization’s reputation, financial performance, and its relationships with stakeholders. This is also the time where the board should reinforce the organization’s values and culture to maintain morale, cohesion, and a sense of purpose among employees.

Evaluation Phase

Identify Key Learnings

Post-Crisis Review: Once the crisis has passed, a best practice is for the Crisis Communication Team to conduct a formal analysis; review what worked, what failed, and what could be improved prior to the next event, and use the results to update the Crisis Communication Response Plan. The Board should also be involved in this post-mortem analysis to identify lessons learned and areas for improvement. This can help the organization better prepare for future crises.

CRISIS REVIEW FORM			
STRATEGY/TACTIC	DESCRIPTION	RESULT	IMPROVEMENTS
Successful			
Successful			
Problematic			
Problematic			

Final Thoughts

Crisis planning is an ongoing and evolving process. Reviewing your Crisis Communication Worksheet annually is a good starting point, but remember that it is essential to remain flexible and responsive to changes in the business environment. Regularly assess the effectiveness of your Crisis Communication Worksheet and be prepared to update it as needed to ensure your organization’s resilience in the face of unexpected challenges.