



Crisis Management

Post-COVID-19: Planning for a New Normal

Table of Contents

Post-COVID-19: Planning for a New Normal Procedures..... 3

- 1.01 Review Current State of Business Model..... 3
- 1.02 Define Future State of Business Model..... 4
- 1.03 Develop a Strategy with Execution Triggers 6
- 1.04 Establish Guidelines and Policies for Operating in Post COVID-19 Economy 7
- 1.05 Migrate from Current State to Future State 8
- 1.06 Develop a Communications Plan 10
- 1.07 Develop a Marketing Plan for Support 11
- 1.08 Identify Metrics to Monitor Restoration Plan Effectiveness..... 12
- 1.9 Re-Assess Risks and Impacts 14

Post-COVID-19: Planning for a New Normal Procedures

1.01 Review Current State of Business Model

Team

Description/Additional Information

1.0 Efficiency

Description/Additional Information

Assess efficiency of the current business model and operations. Operational efficiency describes the maximization of desirable business outputs - e.g. revenue, value proposition, customer satisfaction. Have the business lines adopted their procedures to the circumstances and keeping up with efficiency and speed? Does your organization maximize employee productivity? Is the organization able to keep cost down?

2.0 Effectiveness

Description/Additional Information

How effective is an organization's current business model? Does it allow for a changing world (i.e. more remote work or focus on digital) or is it severely affected by a current disruption? Do employees have all operational support to meet deadlines and reduce possibility of employees making mistakes? Do business lines need to create a change management process and adjust current processes?

3.0 Stress Points

Description/Additional Information

Identify and review stress points triggered during pandemic. This may include, but are not limited to-operations, facilities, customers interaction or service/product delivery, technology, supply chain, and finance. Meet with business units to understand current stress points. How is COVID-19 forcing the recalibration of priorities and habits for customers? Are employees engaged and how will the organization keep employees engaged in the next months?

1.02 Define Future State of Business Model

Team

Description/Additional Information

□ 1.0 Define New Operating Model

Description/Additional Information

Assess organizational strategy going forward and redefine new operational model based on the changes made to the operations during the response and management of the event. The goal is to evolve organization quickly to match a shift in strategy with aim to create value. The assessment should pinpoint aspects of the current organization that could hinder the future strategy and therefore must change, as well as organizational strengths that should be preserved.

1. Assessing customer behavior and designing adjusted methodology of delivering value.
2. Has the organization modeled best, middle, and worst cases financially? Does organization need to seek additional funding, cut costs, etc.?
3. Reducing and shifting portfolio of offerings due to lack of demand, inability to secure goods, inability to deliver (because customer not on premise, customer not able to operate), etc.
4. Adding new products or services (what are customers doing instead, what can organization offer instead of those goods or services organization cannot secure).
5. Explore potential new types of partnerships.
6. Assess and scale back on other types of partnerships.
7. Assessment of geographical risk and dependency on supply chain in affected areas, short and long-term. How will geographical risk impact supply and demand? How does organization shift operations?
8. Assess return to the office, resuming traveling liability implications in a geographic area? Has organization assessed insurance coverage? What are the procedures in the event of a claim?

□ 2.0 Establish Objectives

Description/Additional Information

Create a defined outline on business objectives moving forward. Reevaluate company's strategy, mission, and purpose.

□ 3.0 Structure and Changes

Description/Additional Information

Access and change operating and reporting structures needed to deliver the new strategy and new operational model:

1. Review and assess assignments of roles, responsibilities and expectations to each employee;
2. Review and assess skills and abilities for employees required for each role;
3. Review and assess relationships between departments/functions/subsidiaries.
4. Review and assess skills, abilities and capabilities the company relies on vendor and third parties to provide; insourcing v. outsourcing

□ 4.0 Review Data and Design Changes

Description/Additional Information

Collect, aggregate, and review both internal and external data on business operations during COVID-19. Use the data as a basis to create and adjust policies and guidelines going forward. Types of data reviewed can include the impact on finances, operations, compliance, and reputation. If business impact analysis (BIA) was performed, reviewing and assess the data on potential impacts to the business and business needs going forward.

□ 5.0 Acknowledge Employee Productivity Levels

Description/Additional Information

Assess current productivity levels across business lines. Employees returning to the physical office may be suffering "burnout" or other emotional, mental, or physical stress. Give employees a flexible timeframe to return to work, set up HR resources for concerns and health, and monitor employees for any sign of distress after the event. The employees who are coming to the office should be deemed necessary to be onsite. Should an employee be unable to return to work following the event, considerations will need to be addressed by HR.

□ 6.0 Customer Interaction

Description/Additional Information

Provide an increased focus on customer interaction. Based on feedback received during and after the pandemic, mold organization's policies to reflect new operating procedures such as customer sensitivity, communication strategy, etc. Do customers need to be engaged and accommodated in different way?

□ 7.0 Review Regulatory Guidelines and Compliance

Description/Additional Information

Review all legal compliance and documents related to operations. Ensure contracts obligations can be met during a crisis, whether that means business lines requesting assistance from another department or work with customers and other parties to outline how product or service will be delivered.

□ 8.0 Actively Engage Executives

Description/Additional Information

Liaison often with upper level management and executives. Keep them informed of large, concerning events that may require company-wide action. Business continuity, disaster recovery, and risk management teams should have cadence to meet with the executives.

1.03 Develop a Strategy with Execution Triggers

Team

Description/Additional Information

This procedure outlines considerations for development of triggers that will allow for potential return to the physical office.

□ 2.0 Monitor Local and Federal Government Guidance

Description/Additional Information

Monitor local, state, and federal government guidelines for updates regarding return to work procedures. For accurate and up-to-date information, refer to the company's county Department of Public Health, state's Department of Public Health, and the CDC. These guidelines should be reflected in the organization's triggers and may differ based on location.

1. Has the mandated shelter in place been lifted?
2. Has the recommended shelter in place has been lifted?
3. What is the state's, county's, and city's guidelines for returning to work? How does an organization align and comply with guidelines?

□ 3.0 Monitor public infrastructure availability

Description/Additional Information

Monitor local transportation and mass transit availability and safety for employees to commute to the office. Establish risk tolerance level for mass transportation state which will be acceptable for organization to consider employees start commuting to work. For employees who depend on public transportation, consider offering alternative methods or continue work from home operations until risk level reduced to acceptable level which company and employees agreed to.

□ 4.0 Schools and Day Care Status

Description/Additional Information

Monitor local school and day care status to accommodate return to work procedures for employees with dependents. Flexible schedule procedures should be created to empower employees to have option to work from home until appropriate accommodations are available.

□ 5.0 State / Community COVID-19 Case Status

Description/Additional Information

Establish an acceptable level of new cases every day for a period of time in the community (state/ county/ city) as a trigger. Monitor official / credible channels to analyze and report on data to the internal parties.

□ 6.0 Building Management Access and Protocols

Description/Additional Information

Coordinate with building management to understand the limitation and their plan for return to the office procedures. Establish a trigger point in relation to what is acceptable building management state is to the organization to reoccupy the building.

□ 7.0 Monitor Triggers, Execute and Manage

Description/Additional Information

Dedicate a team to actively monitor trigger points and potential threats to the company, if one does not already exist. Team will monitor trigger points defined and keep all parties involved up to date on information. Quick execution of response plans will help manage the crisis going forward.

1.04 Establish Guidelines and Policies for Operating in Post COVID-19 Economy

Team

Description/Additional Information

This procedure focuses on establishing the policies and procedures to support changes to operations. The next procedure, 1.05 Migrate from Current State to Future State outlines tactical steps to create policies and procedures.

□ 1.0 Workforce Safety and Resilience Policies

Description/Additional Information

Re-evaluate current company safety protocols and identify new risks and potential mitigation strategies. Improve company-wide resilience by appointing a person or team to focus on safety or OSHA compliance. Once local, state, and federal government deems it safe for employees to return to work, organization can execute create safety procedures. See considerations and guidance in step 1 of 1.05 procedure. The policy and procedures should include:

1. Cleaning and Sanitation Policies
2. Workplace Social Distancing Policies

□ 2.0 Modify Physical Layout of the Office

Description/Additional Information

Establish policies and procedures for how physical office layout will be modified and create staggered shift schedule to support workplace social distancing policies. See considerations and guidance in step 2 and 3 of 1.05 procedure.

□ 3.0 Travel Policies

Description/Additional Information

Establish procedures and policies how to roll-back travel restrictions imposed during pandemic response with respect to domestic and international guidance. Review current company policies on travelling and adjust as seen fit. See considerations and guidance in step 4 of 1.05 procedure.

□ 4.0 Sales Interaction Policies

Description/Additional Information

Establish policies and procedures how sales interactions will be performed in case physical interactions are required. See considerations and guidance in step 5 of 1.05 procedure.

1.05 Migrate from Current State to Future State

Team

Description/Additional Information

The following steps outlines tactical guidance on how to create new or modify existing procedures to accommodate operational changes.

□ 1.0 Prioritize Staff Health and Safety

Description/Additional Information

Prioritize safety of staff, employee, and customers. Create or adjust policies to enforce sick employees to work from home or take sick leave when needed. Flexible schedule is encouraged. Review current safety guidelines and update based on regulations and expert best practices. Considerations to review:

1. Perform deep cleaning of the office by hiring professionals. Cleaning crew need to follow CDC and OSHA guidance.
2. Create cleaning policy among employees. Institute increased cleaning protocol through the office during the day and at the end of the day.
3. Increase restroom cleaning protocol.
4. Create cleaning protocol for IT employees who are handling IT assets for new hires and support IT infrastructure.
5. Provide wipes for employees to clean laptops, keyboards, etc.
6. Consider requiring or providing Personal Protective Equipment (PPE) to the employees. If requiring PPE, provide training how to use appropriately provided PPE.
7. Define screening protocol for employees returning to the office, including onsite temperature checks, or require employees to take temperature at home before coming in. When establishing onsite screening, hire trained medical personnel to support with the screening process. Coordinate with HR personnel to address personal and health information concerns by adjusting policies and compliance to reduce liability.
8. Coordinate with HR personnel to enable telemedicine option for employees.
9. Set up diagnostic testing onsite with medical provider (if applicable/accessible).
10. Procure enough cleaning supplies to support created procedures and increased use volume.
11. Set sanitation stations through the office, especially at the entrances. Provide sanitizers for each desk, conference rooms, offices, and shared areas.
12. Communicate elevator capacity protocol, for example only allowing 2 to 4 passengers in the elevator.

□ 2.0 Procure and Setup Workplace

Description/Additional Information

Setup workplace to minimize physical contact, reduce capacity, and allow for easier cleaning. Continue encouraging employees to continue to work from home when possible. Consider following the following steps:

1. Enable no-touch technology where possible (hand-free access to facility/floors, touch-free soap dispensers, etc.)
2. Limit or close off shared spaces. Common areas such as kitchens may have reduced capacity and limited capabilities, such as limiting/closing off microwave or shared fridges access.
3. If decide to close-off shared space, modify the area for additional working space to increase distance between employees.
4. Assess conference room capacity and air ventilation, close some or all conference rooms as needed.
5. Consider adding cubicles or short partitions between workspaces.
6. Create seating arrangement to create at least 6 feet of distance between employees (zig-zag pattern, etc.)
7. If there is physical resource that cannot be cleaned or properly maintained, consider storing the equipment until pandemic is over and procuring a more user-friendly alternative.
8. Create entrance and walking routes through the office.
9. Modify restroom layout and accessibility to create distance.

□ 3.0 Identify and Establish Workforce Schedule

Description/Additional Information

Consider creating "teams" or groups of workers and staggering or rotating out the workforce to minimize cross-contact and contamination. Employees able and prefer to work from home should continue to do so. Use data and interviews with managers to determine necessary personnel. Managers should actively be re-assessing needs based on performance during the pandemic.

1. Create shift schedule for created groups, for example, Monday and Wednesday – Team 1; Tuesday and Thursday - Team 2; Friday- everyone working from home.
2. Create staggered entrance schedule for employees returning to the office.

□ 4.0. Travel Policies

Description/Additional Information

Extra precautions should be put in place for employees travelling to countries/areas with active disease outbreaks. Considerations should be put in place for employees uncomfortable with travelling or the associated liability. Contingencies should be made for clients who require onsite meetings.

1. Create or modify policies around essential travel and non-essential travel guidance.

□ 5.0 Customer, Prospect, and Vendors Interaction

Description/Additional Information

Consider minimizing physical contact with customers and prospects, with focus on virtual meetings (at least initially) and PPE. Provide increased personal protection equipment (PPE) to sales staff that are in contact with customers. For customers and vendors entering the facility, consider requiring them to wear PPE, maintain a safe distance (at least 6 feet), installing protective shields, and reducing facility capacity. Initiate vendor and third parties assessment to ensure they have a return to work plan as well as other business continuity plans. Establish entrance procedures how customers, prospects and vendors (focusing on private offices vs. a retail/ public access office/facility), for example, guests should be registered ahead of time, fill out a screening form, and managers should approve guests.

□ 6.0 Building Management Access and Protocols

Coordinate with building management to understand cleaning protocols, their return to the office procedures, HVAC and air flow of the building, especially for multi-tenant building. Questions to ask can include the following:

1. What kind of HVAC systems are in place for the office?
2. What filters are used for the HVAC system, does the building have HEPA or MEVR filters, or other types of filtration?
3. How does the airflow through multiple offices before reaching our office?
4. Do the building engineers have guidance for tenants for the scenario when organization plan to return to the offices and how we should handle overall ventilation for the office and conference rooms? Any best practices they can share?
5. Does the building management have a plan for how they will manage tenants returning to the offices? Can they share their plan(s) with us?
6. Specifically, looking for procedures the building will take to handle the main entrance?
7. What is the procedure for elevator capacity management?
8. What are the cleaning protocols for shared areas?
9. Are any entrances to the building will be closed/limited?
10. What are the cleaning protocols for daily office cleaning?

1.06 Develop a Communications Plan

Team

Description/Additional Information

1.0 Internal Communication

Description/Additional Information

Maintain contact with employees and notify them of changing guidelines, office policies, or health notices in timely manner. Ensure all staff understand proper safety procedures in the workplace. If modification to the office space was done, provide copy of the layout and closed off premises for proactive education ahead of employees coming into the office. Pre-draft communication notices and adjust as appropriate.

2.0 Third Party Communication

Description/Additional Information

Maintain contact with vendors and third parties and notify them of changing guidelines, safety policies, or health notices. There should be an open communication channel that allows for all parties involved to stay informed. Communicate organization's business continuity policies and procedures as well as what steps the organization is taking to ensure continuity of operations and services, transition, and what steps organization is taking to improve response and recovery, and if any organization is experiencing any material impact to operations.

3.0 Customer Communication

Description/Additional Information

Maintain contact with customers and notify them of changing operational guidelines, safety policies, or health notices. This may be in the form of physical signage in the office, emails, or updated website information. Communicate organization's business continuity policies and procedures as well as what steps the organization is taking to ensure continuity of operations and services, transition, and what steps organization is taking to improve response and recovery.

4.0 Stakeholders and Other Parties Communication

Description/Additional Information

Maintain contact with stakeholders and other parties to notify them of (relevant) changing guidelines, safety policies, or health notices that may impact their investment in the company. Communicate organization's business continuity policies and procedures as well as what steps the organization is taking to ensure continuity of operations and services, transition, and what steps organization is taking to improve response and recovery.

1.07 Develop a Marketing Plan for Support

Team

Description/Additional Information

1.0 Brand/Image

Description/Additional Information

Update marketing and branding to show how company is adopting to post-COVID-19 event. Explain what steps the organization is taking to enable efficient transition, and putting customers and employees' health first. Use careful wording to prevent "upselling" in these emails or posts. Adopt a rapid response mentality and proactively prepare for second wave of similar events and how the company will respond and maintain positive brand and reputation.

2.0 Customer Relationship Management Policies

Description/Additional Information

Place an emphasis on customer sensitivity to current events and in the following months their transition to the new normal. Create a dedicated customer success team, if such a team does not already exist, to monitor customer concerns, and increased or decreased needs.

1.08 Identify Metrics to Monitor Restoration Plan Effectiveness

Team

Description/Additional Information

□ 1.0 Customer Satisfaction

Description/Additional Information

Review data and feedback provided during the pandemic as well as after-action surveys. Did customers like organization's communication style? What was well received and what could have been better? Re-assess customer satisfaction and needs on an ongoing basis with plans to change course of action in case customers are not engaging or returning. Use the following metrics to assess customer satisfaction (not exhausted list):

1. Number of customer complaints
2. Customer Satisfaction Score (CSAT)
3. Customer Retention Rate

□ 2.0 Product and Service Delivery

Description/Additional Information

Compare before, during, and after pandemic productivity and delivery levels. Was the company still able to meet demand during reduced output or are new positions required to help control the flow of service better? Consider this as a continuous process where evolving situations have to be quickly identified and responded to. Use the following metrics to assess product and service delivery (not exhausted list):

1. Utilization rate
2. Customer Experience Rating
3. On Time Delivery
4. Average Ticket Response & resolution
5. Issue Resolution Rate

□ 3.0 Productivity

Description/Additional Information

If metrics exist for employ effectiveness before and during the crisis, review. Note how effective employees were when working from home and if that can be an option for the business going forward. Full productivity might not be immediate as employees recover from burn out and stressors (physical, emotional, etc.) as well as general uncertainty. Note what did and did not work and apply guidelines to update response and continuity plans. Use the following metrics to assess productivity performance (not exhausted list):

1. Employee Efficiency (Maximizes productivity, minimizes cost, makes few mistakes, meets deadlines),
2. Quality of Work
3. Unscheduled downtime
4. Employee Engagement

□ 4.0 Sales

Description/Additional Information

Review sales data during the pandemic, if possible. Ramp up sales goals as the office slowly reopens and create reasonable milestones. Depending on organization's business/products, it may take a while for the general populace to begin buying again. Carefully monitor sales data as lockdowns lift and social distancing eases. Use the following metrics to assess sales performance (not exhausted list):

1. Total revenue
2. Revenue by product or product line
3. Market penetration
4. Percentage of revenue from new business
5. Percentage of revenue from existing customers (cross-selling, upselling, repeat orders, expanded contracts, etc.)
6. Year-over-year growth
7. Average lifetime value (LTV) of user or customer
8. Length of sales cycle

□ 6.0 Marketing

Description/Additional Information

Review marketing data during the pandemic and the following months. Use the following metrics to assess marketing performance, the metrics will vary depending on the kind of marketing the company does, so modify this list to fit organization's needs:

1. Return on Advertising Spend
2. Customer Acquisition Cost
3. Time to Payback
4. Marketing Originated Customer Percentage

1.9 Re-Assess Risks and Impacts

Team

Description/Additional Information

1.0 Threats and Vulnerabilities

Description/Additional Information

Reassess company's defined thresholds for threats and vulnerabilities. Business impact analyses, risk assessments (operational, site, vendors etc.), and other vulnerability practices should be utilized to determine what hazards and risks can impact the company. Threats and risks should be viewed company-wide and as an impact to all departments.

2.0 Workforce

Description/Additional Information

Discover points of failure within the workforce. Did the transition to working from home hit harder than expected? What continuity is set in place in case company loses a large portion of its workforce? Can work be transferred to different sites or a third-party contractor? Do important personnel have cross-trained replacements?

3.0 Supply Chain

Description/Additional Information

Does the organization's supply chain operators have business continuity plans, and have they been tested? Have they done after action reports? If a vendor is unable to meet demand, does organization have an alternate vendor/third-party? If the vendor is unable to produce a product or deliver service, does company have internal process in place or a backlog of products to use until vendor's production/services can resume? Supply chain needs to be more robust and no longer single-source. Supply chain management program should include business continuity and disaster recovery questions in the assessment of new and existing providers.

4.0 Vendors

Description/Additional Information

Does the organization's contracted vendors have business continuity plans, and have they been tested? Have they done after action reports? Create a vendor management procedure to vet future vendors to ensure operations can still run during a disruption. Can a vendor support the organization's needs in a disaster, or they are not prepared and do not have a business continuity program? Vendor management program should include business continuity and disaster recovery questions in the assessment of new and existing vendors. Vendor management needs to be more robust and no longer single-source going forward.

5.0 Technology

Description/Additional Information

Is organization's technology infrastructure up to date? Are employees properly trained with working in different environments and can they work from home? Is IT capable of increased demand during a disaster? The business needs to act on lessons learned and ensure IT disaster recovery plans are created and/or up to date. Consider moving to cloud-based servers or store servers in multiple locations to prevent single-point of failure.

6.0 Reputational

Description/Additional Information

What do customers/clients/vendors think of organization's pandemic response? Does organization place a focus on community or safety or did the organization try to sell products? Did organization treat employees fairly and provide proper PPE? Put in mitigation efforts to reduce future impact to reputation during disasters, such as paid sick leave or contracted third parties to provide products. Business needs to act on lessons learned and be proactive instead of reactive in the future.

□ 4.0 Risk of Second Wave

Description/Additional Information

Start preparedness and planning initiatives to be completed after action report, update pandemic plan, initiate training for incident and crisis management response teams. Continue to monitor threats and risks and proactively respond if there are early signs of second wave of pandemic.