



# CRISIS MANAGEMENT PLAN TEMPLATE

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# Template Overview

The purpose of this Crisis Management Plan Template is to guide you through the development of a management decision-making framework necessary to coordinate response activities following the onset of a disruptive incident impacting business activities and key stakeholders. This plan mirrors strategies documented in the Department Recovery Plans and coordinates department-level response and recovery activities.

This fully editable and customizable template jumpstarts your planning effort by offering sample content and procedures that enable effective and efficient response and recovery to each of the following scenarios:



**FACILITY**



**PERSONNEL**



**TECHNOLOGY**



**SUPPLIER/VENDOR**

Remember, templates are just a starting point and should be customized as necessary to fit the unique needs of your organization and program.

## Catalyst Automates Your Program

This template is from Catalyst [business continuity software](#). Please review the last page of this document if you're interested in learning how your plans can be activated and used in real-time when built in Catalyst.

Catalyst provides comprehensive, yet easy to use, business continuity and IT disaster recovery planning functionality to prepare organizations for disruptive incidents. Designed for the global enterprise organization, Catalyst scales to address the needs of any organization – regardless of size, industry, or geography. With Catalyst, business continuity planning is simple, scalable, and actionable – for both the program manager AND end user.

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We look forward to connecting with you!

# Contents

- Template Overview ..... 2
- Catalyst Automates Your Program ..... 2
- Cover Page ..... 4
- Plan Overview and Introduction ..... 4
  - Purpose ..... 4
  - Objectives ..... 4
  - Assumptions ..... 4
  - Scope ..... 4
- Crisis Management Design ..... 5
  - Response Structure ..... 5
- Crisis Management Team ..... 5
- Team Location ..... 6
- Activation Information ..... 7
  - Triggers and Activation Criteria ..... 7
- Recovery Strategies ..... 7
- Crisis Management Procedures ..... 8
  - Initial Response and Assessment ..... 8
  - Crisis Management ..... 9
  - Ongoing Recovery and Return to Normal ..... 11
- Crisis Communications Guidance ..... 11
- Appendix I: Contact Information ..... 12
- Appendix II: CMT Meeting Agenda ..... 13
- Appendix III: Supporting Documents ..... 13
- History Log ..... 13

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# Cover Page

**TITLE:** [Insert]

**DESCRIPTION:** [Insert]

**OWNERS:** [Insert]

**CONTRIBUTORS:** [Insert]

**LAST UPDATED:** [Insert]

**LAST APPROVED:** [Insert]

**STATUS:** [Insert]

**EXERCISE STATUS:** [Insert]

## Plan Overview and Introduction

### PURPOSE

The purpose of this Crisis Management Plan is to document the procedures that will be used to manage the organization's response to disruptive incidents, as well as coordinate the recovery effort for affected teams, activities, and resources. This plan mirrors approved strategies documented in associated emergency response, business continuity, and IT disaster recovery plans.

### OBJECTIVES

The objectives of this Crisis Management Plan include, but may not be limited to:

- Achieving situation awareness during a crisis and confirming roles and responsibilities associated with the response
- Defining and continuously reviewing the strategic direction of response requirements
- Identifying issues, making decisions, assigning actions, and confirming the implementation and results of actions
- Guiding the activation, implementation, and management of supporting response and recovery teams within the organization

### ASSUMPTIONS

- [LIST ASSUMPTIONS MADE DURING THE PLANNING PROCESS]

### SCOPE

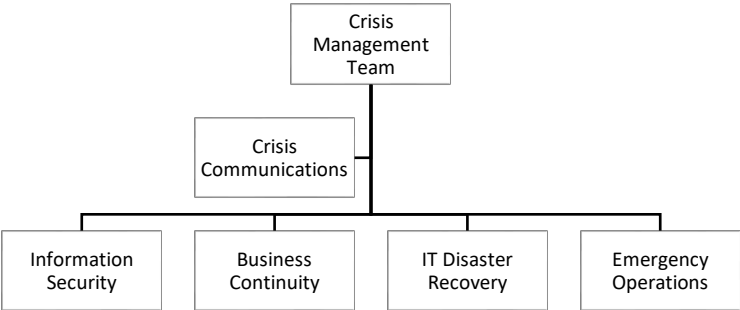
The scope of the Crisis Management Plan includes the entire organization and supports response and recovery of the following products and services, identified as critical to the organization.

- [List Scope of The Plan]

# Crisis Management Design

## RESPONSE STRUCTURE

The crisis management structure includes the support from a variety of preparedness, risk management, and response programs. The organization is structured to effectively manage disruptions while facilitating coordination and communication across business continuity, IT disaster recovery, emergency response, facilities, and security plans, as well as crisis communications plans and procedures.



## Crisis Management Team

The Crisis Management Team (CMT) provides tactical direction enabling the overall response and recovery effort during major disruptive events. The CMT is comprised of numerous roles, however not all roles may be required for all disruptive events. The CMT Leader and CMT Coordinator will jointly identify which roles are most applicable to the event at hand.

ROLE AND RESPONSIBILITIES	PRIMARY MEMBERS	ALTERNATE MEMBERS
<p><b>CMT LEADER</b> Provide leadership to the Crisis Management Team; assess input from department leaders and evaluate cascading or operational impacts; serve as the ultimate decision-making authority on behalf of the organization.</p>	[Insert]	[Insert]
<p><b>CMT COORDINATOR</b> Coordinate with the affected departments to understand their operational impacts and existing response efforts; assist the CMT Leader in ensuring all CMT tasks in the Procedures section are completed, including identifying tasks that should be repeated periodically as necessary and reminding the CMT Leader of pressing tasks.</p>	[Insert]	[Insert]

ROLE AND RESPONSIBILITIES	PRIMARY MEMBERS	ALTERNATE MEMBERS
<p><b>CRISIS COMMUNICATIONS LEADER</b>            Coordinate with [INSERT DEPARTMENT NAME] for guidance on approved messaging and focus points for each stakeholder. Distribute crisis communications messaging as directed by management.</p>	[Insert]	[Insert]
<p><b>FINANCE AND IT REPRESENTATIVE(S)</b>            Address resource requests from the CMT and departments. Advise the CMT on potential significant financial losses resulting from business activity and /or IT failure.</p>	[Insert]	[Insert]
<p><b>HUMAN RESOURCES REPRESENTATIVE</b>            Accumulate and report personnel accountability results following a disruptive event. Represent the organization at local hospitals where employees are taken by local authorities, coordinating assistance with hospital staff, family members, and the Crisis Communications Leader. As needed, assist with the sourcing of personnel (temporary or permanent) from other sites, businesses, or third-parties. Ensure compliance with OSHA reporting.</p>	[Insert]	[Insert]
<p><b>FACILITIES REPRESENTATIVE</b>            Provide on-site situational assessment to the CMT and manage the interface with local first responders. Lead the assessment, cleanup, and repair effort at affected site(s). Provide resources during the response to maintain security and protect property.</p>	[Insert]	[Insert]
<p><b>LEGAL REPRESENTATIVE</b>            Advise the CMT regarding legal implications of crisis decision-making, as well as the crisis's effect on contractual/regulatory matters and current litigation.</p>	[Insert]	[Insert]
<p><b>ADMINISTRATIVE REPRESENTATIVE</b>            Provide administrative support to the CMT throughout the event; assist in screening all communications into the CMT; acquire/set up CMT logistical resources, arrange travel for team members; and retrieve and maintain team member log books for performance evaluation and historical purposes.</p>	[Insert]	[Insert]

## Team Location

The Crisis Management Team will operate from an appropriate alternate location (e.g., Crisis Command Center), depending on the type of business interruption. The following table summarizes the three primary locations, and the information necessary to enable a virtual meeting location.

PRIORITY	LOCATION
PRIMARY	[Insert - Onsite]
SECONDARY	[Insert - Offsite]
TERTIARY	[Insert - Third-Party]
VIRTUAL	[Insert]

# Activation Information

## TRIGGERS AND ACTIVATION CRITERIA

The CMT will be activated by the CMT Leader upon the onset or identification of an enterprise-level disruptive incident that is or may reasonably be expected to have detrimental impacts to any identified product or service. The table below describes pre-identified activation levels, criteria, and necessary actions that should be used to determine if activation is necessary:

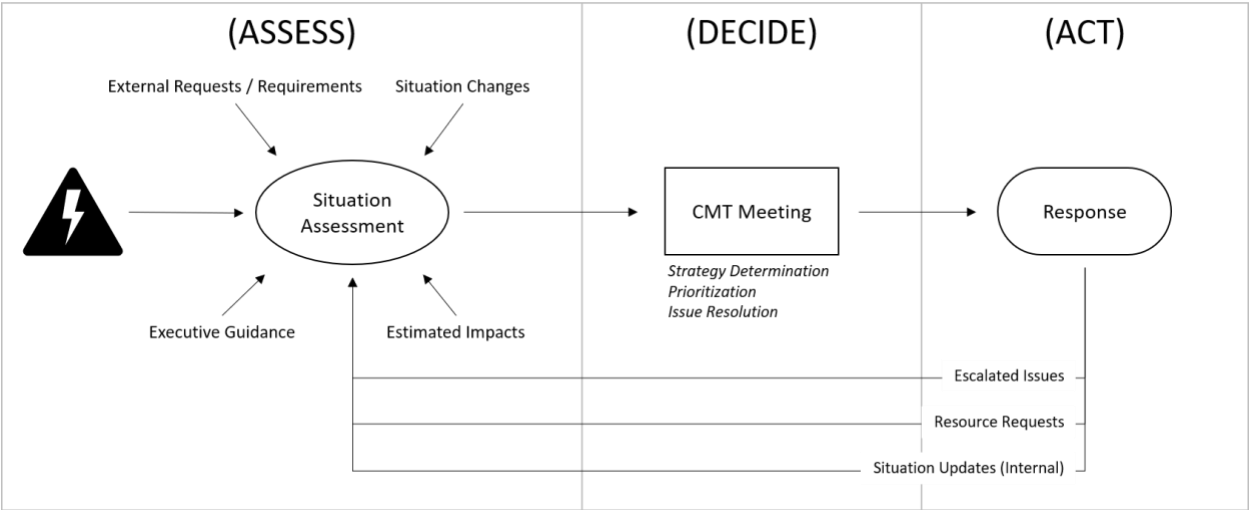
ACTIVATION LEVEL	ACTIVATION CRITERIA	ACTIONS
<b>COMPLETE</b> Decisions may require the Executive Leadership Team Requires full CMT Activation	[Insert]	[Insert]
<b>PARTIAL</b> Decisions require the CMT or the CMT leader Notify the CMT Coordinator Activation of the CMT may be required Notify the Executive Leadership Team	[Insert]	[Insert]
<b>NOTIFICATION</b> Decision can be made at the functional or site level Inform the CMT Coordinator Activation of the CMT is not required	[Insert]	[Insert]

# Recovery Strategies

INCIDENT	ACTIVATION CRITERIA	ACTIONS TAKEN
LOSS OF FACILITY(IES)	[Insert]	[Insert]

INCIDENT	ACTIVATION CRITERIA	ACTIONS TAKEN
LOSS OF TECHNOLOGY	[Insert]	[Insert]
LOSS OF CRITICAL SUPPLIERS	[Insert]	[Insert]
LOSS OF PERSONNEL	[Insert]	[Insert]

# Crisis Management Procedures



## INITIAL RESPONSE AND ASSESSMENT

#	TITLE	ROLE
1	<p><b>CONDUCT NECESSARY EMERGENCY NOTIFICATION AND COORDINATION</b></p> <p>Based on the nature of the incident and the information available, initiate necessary emergency notification via [INSERT TOOL OR METHOD]. See Crisis Communications Plan for additional information.</p>	[Insert]
2	<p><b>PERFORM INITIAL ASSESSMENT AND DETERMINE INTENT</b></p> <p>Select necessary CMT roles (as appropriate) to perform the initial situation assessment using the [INSERT LINK TO ASSESSMENT TOOL]. Following the initial assessment, determine the CMT Intent for recovery by answering the following question:</p> <p><b><i>“What milestone(s) need to be achieved in order to deactivate the CMT?”</i></b></p>	[Insert]



#	TITLE	ROLE
3	<p><b>DETERMINE ACTIVATION REQUIREMENTS</b></p> <p>Based on the recovery intent, determine the response strategy (see Response Strategy Table and Triggers and Activation Criteria).</p>	[Insert]
4	<p><b>ACTIVATE THE CMT AND MONITOR RESPONSE</b></p> <p>If full or partial CMT activation is required, activate the necessary members via [TOOL OR METHOD TO ACTIVATE THE TEAM]. Provide the initial CMT Meeting Agenda to include:</p> <ul style="list-style-type: none"> <li>• The CMT Leader’s Recovery Intent</li> <li>• Initial Situation Assessment</li> <li>• Response and Recovery Guidance and Priorities (as necessary)</li> <li>• Reporting Requirements</li> <li>• Support from the CMT or other groups (as necessary)</li> </ul>	[Insert]
5	<p><b>REVIEW TEAM MEMBER GUIDE</b></p> <p>CMT members review their respective Team Member Checklist (Appendix II) to ensure that they are aware of the expectations for their participation. If additional considerations should be added to the CMT Agenda, notify the CMT Coordinator prior to the meeting.</p>	[Insert]

## CRISIS MANAGEMENT

#	TITLE	ROLE
1	<p><b>CONDUCT CMT TEAM MEETING</b></p> <p>Conduct the CMT Team Meeting, leveraging the CMT Meeting Agenda and [OTHER RESOURCES AS NECESSARY]. CMT Meetings should be focused on identifying and reviewing information necessary to make decisions, solve issues, and communicate requirements.</p>	[Insert]
2	<p><b>EXECUTE CRISIS COMMUNICATIONS</b></p> <p>Based on the decisions made by the CMT, execute necessary communications leveraging the Crisis Communication Plan and [OTHER TOOLS].</p> <p>Crisis communications includes the potential requirement to facilitate effective communication between recovery groups and the CMT. Communications personnel should ensure that information is effectively provided to the CMT and CMT Leader as the situation is managed.</p>	[Insert]

#	TITLE	ROLE
3	<p><b>COORDINATE RESPONSE STRATEGY</b></p> <p>Coordinate response and recovery strategies leveraging [CATALYST INCIDENTS MODULE] in accordance with the CMT Leader’s Recovery Intent, additional guidance provided, their respective Team Member Guide, and supporting plans and procedures.</p>	[Insert]
4	<p><b>MONITOR AND ASSESS EFFECTIVENESS</b></p> <ul style="list-style-type: none"> <li>• Review the status and activities of impacted areas of the organization</li> <li>• Approve activity and procedure changes as necessary</li> <li>• Review and approve resource and/or funding requests</li> <li>• Identify issues with implemented response strategies and develop recommended course of action (for approval as necessary)</li> <li>• Review and provide recommended changes to the CMT Meeting Agenda as necessary to facilitate resolution of identified issues</li> </ul>	[Insert]
5	<p><b>INFORM WITH THE EXECUTIVE LEADERSHIP TEAM</b></p> <p>As necessary, notify the Executive Leadership Team via [TOOL] of decisions made or of decisions that require Executive Leadership input. Reference the Crisis Communications Plan and Decision-Making Criteria.</p>	[Insert]
6	<p><b>CONDUCT ONGOING CRISIS MANAGEMENT</b></p> <p>Conduct the Crisis Management Process (based on frequency of meetings determined by the CMT Leader) until the CMT Leader’s Recovery Intent is achieved and the CMT can prepare for deactivation. This process may require sustained activation for extended periods of time or may be completed within a short timeframe based on the nature of the incident and CMT Leader’s Recovery Intent.</p>	[Insert]
7	<p><b>PREPARE FOR DEACTIVATION AND SUPPORT ONGOING RECOVERY</b></p> <p>When the CMT Leader’s Recovery Intent for the organization’s response has been achieved, the CMT Leader prepares to deactivate the CMT. Conversely, the CMT may remain active until all subordinate recovery teams are formally deactivated.</p>	[Insert]
8	<p><b>DEACTIVATE THE CMT</b></p> <p>To deactivate the CMT, the CMT Leader plans for and facilitates the final CMT Meeting. Information to be reviewed and discussed includes:</p> <ul style="list-style-type: none"> <li>• Overview of the response and recovery effort to include actual impact (financial, operational, reputational, regulatory, and others as available)</li> <li>• Ongoing recovery activities to include additional guidance as necessary and those needed to participate</li> <li>• Documented key issues requiring resolution</li> <li>• High-level lessons learned for the CMT (as necessary)</li> </ul>	[Insert]

#	TITLE	ROLE
	<ul style="list-style-type: none"> <li>Time, date, location, and participation for the formal Post-Incident Review</li> </ul>	

## ONGOING RECOVERY AND RETURN TO NORMAL

#	TITLE	ROLE
1	<p><b>DEFINE AND SUPPORT ONGOING RECOVERY OPERATIONS</b></p> <p>Assess ongoing recovery requirements and monitor the execution as necessary. This may include:</p> <ul style="list-style-type: none"> <li>Receiving situation updates from business areas still returning to normal operations and support ad-hoc coordination as necessary</li> <li>Liaising with Executive Leadership to acquire approval for financial support to impacted areas (if necessary)</li> </ul> <p>The CMT Coordinator will continue to consolidate information provided by recovery teams until each is formally deactivated.</p>	[Insert]
2	<p><b>PLAN AND CONDUCT POST-INCIDENT REVIEW</b></p> <p>Prepare for the CMT Post-Incident Review. Ensure the right participants and distribute the agenda prior to the meeting.</p>	[Insert]
3	<p><b>UPDATE CRISIS MANAGEMENT DOCUMENTATION AND SUMMARIZE POST-INCIDENT REVIEW</b></p> <p>Based on the outcomes of the Post-Incident Review and additional post-incident review discussions, review and update necessary preparedness, response, and recovery documentation.</p>	[Insert]

## Crisis Communications Guidance

The CMT should consider the following items when developing and delivering crisis communications to internal stakeholders:

- Consult with Legal/HR and the affected sub-business unit to determine the extent of the interruption and gather information concerning those impacted by a disruption for use in messaging. Be sure to only communicate correct/verified information and avoid speculation.
- Develop specific messaging for various crisis communication methods.
- Continue communications even if the situation has not changed and updates are not available so that stakeholders are aware of ongoing communications efforts.

The following table describes key stakeholder groups and their associated message requirements and timing. During an incident, consult the Crisis Communications Leader Guide and the Crisis Communications Plan if applicable:

GROUP	MESSAGE REQUIREMENTS	TIMING	COMMUNICATION METHODS	DELIVERY RESPONSIBILITY
EMPLOYEES				
CUSTOMERS				
LOCAL AUTHORITIES				
MEDIA				
VISITORS				
[OTHER]				

## Appendix I: Contact Information

NAME	JOB TITLE	WORK EMAIL	WORK PHONE	HOME PHONE

# Appendix II: CMT Meeting Agenda

**EVENT NAME:**

---

**DATE/TIME:**

---

**MEETING PARTICIPANTS:**

1. Review situation assessment or status update
  - a. Discuss facts
  - b. Discuss assumptions
  - c. Review previous decisions and actions (as applicable)
2. Discuss realized or anticipated impacts
3. Discuss and reach consensus regarding the organization’s response and recovery strategy
4. Discuss and provide input to the business continuity and ITDR Teams regarding organizational response and recovery priorities
5. Review crisis communications efforts to date; identify upcoming, required communications to key stakeholders

# Appendix III: Supporting Documents

The following additional materials may be needed by plan users.

FILE NAME	DESCRIPTION	FILE LOCATION

# History Log

VERSION	DATE	ACTION
1		



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