

EXPERT SERIES

The "Expert Series" is a collection of articles, papers and writings by PM Solutions' associates and other industry experts that provides insight into the practice and value of project management.

Crisis Management: Project Management's Role by, Karen R.J. White, PMP

AS I SIT HERE ALMOST THREE MONTHS AFTER THE ATTACKS OF SEPTEMBER 11, I find myself thinking about some of the articles I read about the turmoil that the companies in the area of the World Trade Center went through to put their business continuity plans into action. As I think about it, it occurs to me that what many of these companies lacked was project management before crisis management. If they had applied project management principles before the crisis struck, a portion of the turmoil would not have existed.

Let me explain what I mean by using an example. A few years ago, I was involved in the development of a business continuity plan for a major national museum. One of the areas covered by the plan was the facility itself, a facility often identified as a potential terrorist target. During the information gathering phase of the plan's development, I asked the human resources director two questions: Did she have access to her employees when they were not at their worksite, and how would the employees continue to earn their salaries should the office space become uninhabitable? The perplexed look on her face told me to walk through a scenario with her. I led her through the minutes and hours following a fire in the administrative wing of the facility. She quickly realized that she did not have a way to determine where her employees were or how to reach them to tell them of alternative work locations; that she did not have any idea where those alternative work locations would be, or even where her Disaster Recovery Team should meet for directions and guidance.

This example demonstrates that the proper planning before a crisis can prevent turmoil. Individuals tasked with the development of an organization's disaster recovery plan need to apply the management practices associated with project planning to the development of their business continuity plans. But, unlike other projects, this planning needs to occur prior to the project initiation.

Activity Identification

- Develop multiple work breakdown structures (WBS), identifying all activities that will need to be accomplished, and identify redundant resources. Have the WBS in the business continuity plans.
- Make sure your business continuity plan addresses all business functions. Many times business continuity plans address only the IT side of the business.
- Establish a budget and spending authorization process. Someone will have to approve the living expenses your recovery team might incur. Be sure to include easy-to-follow expense processing guidelines. Be ready to quickly reimburse employees who might be using personal assets to acquire emergency equipment and supplies or who might be incurring unusual travel expenses.
- Institute processes by which your entire business continuity plan is tested, including having employees working remotely. One of the issues identified during the validation test of the business continuity plan for a major government agency was the inability of half the team assigned to recovering the agency's mission-critical applications to re-locate to the remote facility for the required time period. The reason? Family responsibilities that included evening childcare problems.

- Plan for grieving/counseling. Make arrangements for additional trained human resource specialists and employee assistance staff to address problems that might arise, especially for those folks on your emergency response teams.
- Include activities that need to be completed after the immediate crisis has been addressed. These activities include conducting a Lessons Learned session to determine what worked smoothly and what didn't; updating and re-distributing contact lists with new contact information; updating and re-distributing the business continuity plan accordingly.

Resource Identification

- Develop a roles and responsibilities matrix that clearly defines the expectations for each member of the recovery teams and of each major organizational unit. Some units will have the responsibility to ensure recovery of data systems. Others will be tasked with the job of reconstructing personnel files. Be sure that each activity in your WBS has an individual responsible for its completion, and the resources by which to complete it.
- Assign pre-determined emergency response teams, who will decide what needs to be recovered for each major business unit and identify where your command center will exist. Determine who will lead the command center.
- Assign multiple recovery teams associated with each business function; consider decomposing your business continuity plan so that each business function's recovery effort is contained in its own section.
- Know who in your organization could be subject to a call from local or national authorities (i.e., retired policemen, reservists, recently discharged military personnel, Red Cross volunteers) and make sure they are not on your emergency response and disaster recovery teams. If they are crucial to your business continuing to function, start now with identifying and training their backup.
- And don't forget the physical resources. As Pimm Fox stated in his October 1, 2001 *Computerworld* article: Many firms don't have fire hoods, flashlights or light sticks as part of their standard emergency kits. I would venture to say that many companies don't even have standard emergency kits readily available to their staff. Another often overlooked tool is some form of communications device (pagers, two-way radios, cell phones) that could be used to reach key personnel.

Communications Planning

- Make sure a directory of your staff's home phone numbers is available off-site to all emergency response team and disaster recovery team members. Make it a requirement that these lists be maintained and retained at each person's home.
- Determine how you will communicate with your staff during the crisis (phone, e-mail, public announcements). Ensure that your resource plans include the vital communications tools, be they two-way radios on the disaster site or cell phones that individuals have in their personal possession. Consider establishing emergency websites that staff can use to get latest updates.
- Develop a communications plan that addresses who will call who in the staff. Consider using a "calling tree" to share the burden among managers and other leaders. When I was in the U.S. Army Reserves, this is the method we used to communicate an alert to members of our units. The company commander received the alert notice from Headquarters. He in turn called each of his officers, who in turn called their assigned NCOs. Each NCO then called (and kept calling until contact was

achieved) the four or five individuals in his/her squad. As each branch of the tree was completed, a call was placed back up the tree to report the status of each individual. This way, everyone in the unit was contacted very quickly.

- Include in that communications plan a clear statement of who will handle customer communications, who will handle press releases, what information will be communicated to the various audiences, etc. This is one area that needs to be carefully thought through to prevent general panic among employees, their families, and your customers. Both the message and the delivery of that message need to be credible and foster trust in the company.
- Develop a training program that familiarizes all staff with the contents of the business continuity plan: its purpose, the roles and responsibilities of the various teams, the role each staff member will play should the plan be placed into action, and under what circumstances that activation would happen.

If you have planned your business continuity project correctly, you will be prepared to execute it during a crisis. Key points to remember when in the recovery mode include:

- Invoke clear decision-making guidelines
- Follow the pre-determined roles and responsibilities
- Most important: Communicate!

POSTSCRIPT: After this article was completed, an article in *Computerworld* ("Looking Beyond IT for Redundancy," by Jaikumar Vijayan, 17 Dec. 2001) noted that, "The events of September 11 are forcing companies to think beyond information system uptime when it comes to disaster recovery and business continuity planning." Vijayan goes on to cite the efforts of firms in the World Trade Center that were most successful in the resumption of business activities after the tragedy. He noted that many of them had followed strategies cited in this article. A word to the wise!

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