



Information Triage

Developing A Systemic Approach To Crisis

Findings:

Crisis communications is an important capability of modern public-facing organizations

Effective organizations have:

- **A system to triage information in real time**
- **Planning and preparation exercises to test capabilities**
- **An understanding of situational risks and opportunities that allows for timely decision-making**

YELLING at the news sometimes makes you feel better, but it doesn't solve your problem. We have seen numerous recent examples of companies that got into trouble with intense public scrutiny and then struggled to explain themselves, with serious reputational and market consequences.

Especially in the current media environment, there are going to be times when individuals or companies will experience high levels of public scrutiny. It may be a single inarticulate comment, it may be a systemic challenge within a company resulting in litigation, or it may be a persistent public misunderstanding of the facts. The question is: what do you do about it?

There are commonly two

very different types of crisis situations. In the first, there is significant risk of litigation or regulatory scrutiny. This is a situation where for liability reasons, a firm or organization may want to avoid public release of information, according to guidance of the legal team. In the second, there is little litigation risk, and the problem is not whether to release information, but

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how fast you can get it out the door and in front of your audiences. Somewhere in between these two is a scenario where a company may win the litigation, but have no reputation or brand left after the dust clears, perhaps the worst outcome of all.

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audiences, subject to the constraints of legal considerations. The information may be the organization's side of the story, or it may be a mea culpa. Audiences may be as broad as the general public, or may be specific stakeholders in the media or within a company.

Operationally, we think of this goal in terms of information triage, and we deploy systems developed for presidential campaign rapid response teams to facilitate that process, along with deep-dive preparation for high-scrutiny moments, like congressional testimony or a regulatory fine.

There are key questions to understand before a crisis hits: How do we track and react to information that is public? How do we access

relevant internal information to understand the reality on the ground? How do we facilitate the decision-making process so that the organization is addressing the situation actively instead of passively?

Complementing these processes is preparation. Organizations that plan effectively for crises know where to get answers quickly, have contact information handy for key sources of information and audiences, have a response team in place with defined roles, and have run drills that anticipate potential scenarios.

Strategically, when an organization faces a challenge, the critical question is often: what do you respond to and at what level of volume? It doesn't make sense to an-

swer every critique with a response from the CEO, but it is important to maintain control of the news and narrative around your issue by defining it on your own terms rather than allowing your critics to do so. Understanding these choices and tensions beforehand and then acting decisively in the moment make for a successful response.

Systems

Thinking about a crisis situation as a system can be very helpful in bringing order to a situation that is by definition chaotic (Figure 1). The system offers a process to follow when the situation is uncertain and decisions can be unclear.

Borrowing from rapid response communications, the foundation of dealing with a crisis has to be situational awareness. This process starts with a comprehensive monitoring of the news and

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Fig. 1: Enabling Communications Decision-Making In A Crisis

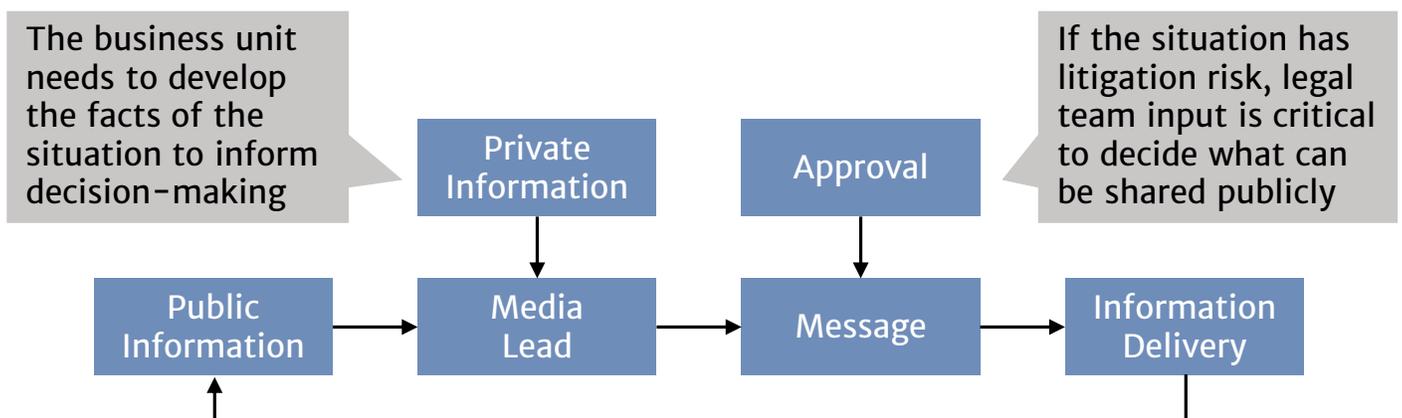


Fig. 2: Crisis Management Stages



any other external sources of information in real time. Errors in coverage can compound if left unchecked and new issues can crop up unnoticed if there is not a comprehensive system to monitor news.

Situational awareness also includes access to internal subject matter experts and a catalogue of facts and arguments

about the issue in question. If your company has a workplace safety protest, it helps to have documentation of all the work that is done to mitigate risks. If you have a product safety recall, you need to have the product engineers on speed dial to get a thorough understanding of what happened. Along with this internal understanding comes the internal response. How are we fixing the problem in question, or how can we explain that it isn't the situation critics claim?

An important goal in any crisis scenario is matching the public understanding of the situation with the internal understanding and response.

This is the message development function, and to facilitate this process, it helps to have a designated crisis lead or crisis team.

Commonly this function will have inputs from relevant internal legal, communications, and functional stakeholders, but understanding the process of approval is

perhaps the most important operational aspect of avoiding paralysis in a moment of decision. The designated crisis lead has to have either approval to make decisions on messaging or they need to have authority to interrupt meetings to get that approval. Anything short of that will result in missed news cycles and frustration by all parties when the needed message does not get out.

Once a decision is made on

the message, the communications team needs to choose a channel for distribution and figure out how that channel can most appropriately impact the news, thus changing and improving the external information flow to target audiences and ideally creating a positive feedback loop on the issue or situation.

Preparation

Creating the systems to handle a crisis situation is just one element of effective preparation. In addition to identifying the people, roles, and processes, organizations need to catalogue information, engage in scenario planning, and then run simulations using the established process. There is no substitute for practice and experience, especially in high stress situations.

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most important. If the event has not become public, organizations will have more time and space to prepare, and it is important to take advantage of that opportunity (Figure 2).

Establishing the fact base of the situation is perhaps most important. If you do not have a command of your own facts, you will never be able to persuade others to see the world as you do. At the same time, it can be helpful to have a red team exercise and look at the situation from your critics' point of view to understand your own weaknesses and vulnerabilities.

As the organization plans for the crisis moment, each possible scenario should be mapped out with the relevant messaging, activities and materials ready to be executed. Preparation can take the guesswork out of basic tactics and allow the team to focus on the unexpected challenges that always come up.

Action

While systems and preparation are necessary for dealing with a crisis, they are not sufficient. Ultimately, strategic understanding of risks and opportunity in response make the reaction to a crisis a success or failure (Figure 3).

Fig. 3: Balancing Response In A Crisis

| | | | |
|------------------|----------------------|---------------------|-------------------------|
| Severity Of News | High (Fraud) | Flatfooted | Rising To The challenge |
| | Low (Staff Turnover) | Business-As-Usual | Overreaction |
| | | Low (Press Release) | High (CEO On TV) |
| Response Level | | | |

The goal is to know when you are in a crisis moment and rise to the challenge at that time.

Other aspects of crisis management described in this paper are operational and tactical, but the level of response is very much a matter of balance and strategy.

Deciding what not to say is as important as what you say and what vehicle you use to say it.

lose control of the story and the situation may spiral out of control.

The goal is to know when you are in a crisis moment and rise to the challenge at that time. With preparation this is not only possible but necessary for any organization that operates with public exposure. []

If an organization uses a TV interview with the CEO as a response to a relatively small issue, they risk increasing attention to a critique that otherwise would die off or lose attention. Alternatively, if the organization goes into bunker mode when there truly is a crisis, the organization will