

## Toolkit Template Communication Plans

**Objective:** This template has been developed to document critical activities and information related to your business in the event of the incapacitation of your executive leader or owner. This toolkit profiles strategies and provides a guide for communicating with staff and customers effective during the absence of the leading executive or business owner.

Sudden leadership changes can generate panic and uncertainty with the company and across its customers. Companies with communication plans that succinctly message to staff and customer and maintain a healthy flow of information during a leadership absence perform much better than those firms with no plan in place.

### Internal Communications - Critical Messaging to the Staff

When an event results in the sudden absence of the leader or owner of a business, staff naturally worry about the implications of the event, specifically their jobs and futures with the firm.

Some strategies for interim leadership and their staffs to implement internally during these times include the following:

- Provide information to the staff as soon as possible. Better to get in front of the messaging and ensure its accuracy before rumor or incorrect information spreads from poorly informed staff members.
- Inform staff of the interim leadership quickly. This can be accomplished in a town hall format, webcast, email or calls and individual meetings with employees.
- Focus messaging on next steps and continuity rather than specifics about the condition or prognosis of the leader or business owner.
- Weekly updates to staff regarding key initiatives and progress being made contributes to a positive culture and outlook.
- Respect the privacy and wishes of the absent leader, but make certain that any remarks from that individual are internally consistent with other messaging from interim leadership.



GIS

Global Institutional Solutions

## Business Growth & Continuity (BG&C)

- Weekly updates to staff regarding key initiatives and progress being
- made contributes to a positive culture and outlook.
- Respect the privacy and wishes of the absent leader but make certain that any remarks from that individual are internally consistent with other messaging from interim leadership.

### External Communications

Unfortunate news travels quickly and it is essential to reach out to key customers and suppliers and reassure them that a plan for such an event has been in place for a while and that operations and delivery will continue without disruption.

Competitors may use the opportunity to spread fear or raise questions of firm viability, again making it essential to get in front of the messaging and allay any customer fears.

Strategies for communicating with customers during an absence include the following;

- Prepare a list of contacts, ordered by the importance (revenue or size of account) of the customer and have the interim leader reach out with calls and/or personalized emails to the lead contacts at each of these customer firms.
- Messaging should include mention of long-standing contingency planning for such an event and the immediate execution of the business continuity plan.
- Emphasize that there will be no disruption in services and deliveries and provide a number to call if customers have any additional questions.
- Focus messaging on the positive and provide minimal information about the condition of the leader/owner. Looking forward and driving towards continued success is the superior theme for any communication.
- Proactively provide an interim update via calls and/or email with a succession plan in the event of the leader or owner's death.
- Similarly, if there is the need for an exit, this should be positively and proactively shared with customers. Better they hear it from you than from competitors or other sources.
- Transparency breeds success.