

### About This Checklist

Following a crisis, there are three phases that a business goes through – Conservation, Recovery and Rebuilding. Each phase requires a separate plan to ensure the business balances protecting and running the business today (Conservation) while retooling the business for tomorrow (Recovery). Businesses who navigate from reactive to proactive will position themselves to not only survive the crisis, but to thrive after the pandemic.

This Checklist provides you with an understanding of the key considerations and steps involved in developing the Conservation Plan for your business so you can identify what you have done and what else you need to complete.

#### > Financial Considerations

- Establish immediate freeze on non-essential and 'new' spending even if already approved or budgeted
- Set interim budget and cash-flow forecast based on projected declines in core revenue streams
- Pivot resources to mitigate loss of primary revenue sources and to generate or grow non-traditional sources
- Review cost structure to determine opportunities for savings, deferral of expenses and/or optimization
- Outline scenarios and how translate into revenue decline, cash flow implications and P&L impact
- Secure government financial supports including wage subsidies, loans, credits and deferred payments

#### > People Considerations

- Identify and secure critical roles, functions and people essential through to recovery phase
- Identify performance issues, risks and gaps to determine who should go first, who should not return
- Evaluate how to 'right size' the structure without impacting recovery
- Identify people-related cash conservation alternatives to reduction that may be implemented immediately
- Establish order and approach to reducing workforce (workforce reduction plan)

#### > Workplace & Cultural Considerations

- Secure the health, safety and well-being of employees
- Align decisions to guiding principles / values of organization
- Define communication strategy including "in-person" and two-way
- Establish new rules or guidelines for working in new context
- Establish new traditions for maintaining engagement and cultural continuity as employees are impacted

#### > Leadership Considerations

- Assess skills of the organization's leaders to lead effectively during conservation and recovery
- Set up dedicated war-room team to deliver critical business action plans
- Identify how best to support leaders
- Address leadership conflicts, behavioural gaps and dysfunctions (e.g., silos) that will interfere

*Note: Additional resources for completing each of these elements is provided in the attached workbook.*

### About This Resource Guide

Following a crisis, there are three phases that a business goes through – Conservation, Recovery and Rebuilding. Each phase requires a separate plan to ensure the business balances protecting and running the business today (Conservation) while retooling the business for tomorrow (Recovery). Businesses who navigate from reactive to proactive will position themselves to not only survive the crisis, but to thrive after the pandemic.



This Resource Guide provides you with a step-by-step roadmap for establishing your Conservation Plan. It includes additional details or explanations for each element of the checklist, guiding questions to ensure you can define your plan, examples to clarify where relevant as well as potential risks to decision making on the element mitigate.

### Section 1: Financial Considerations

The most critical consideration from the start is for every business to get a strong handle on the financial perspective and the implications, short and medium term, on the cash position of the business in order to ensure its survival. It is important during this process though to not take action that will undermine the ability of the business to recover or to avoid planning with a wait and see attitude. Working through the financial considerations of your conservation plan requires involvement of leaders with different viewpoints to develop and evolve the best approaches.

<b>ELEMENT: Establish immediate freeze on non-essential and ‘new’ spending even if already approved or budgeted</b>	
<b>Additional Element Details</b> <i>(What else is included?)</i>	<b>Guiding Questions</b> <i>(What leaders need to ask?)</i>
<ul style="list-style-type: none"> <li>– Urgent cost cuts focused on conservation cash such as hiring freeze, opex, capex, working capital, deferring of salary increases, travel</li> <li>– Also consider collections process and how to increase pace and likelihood of collections</li> <li>– May need to identify initial freeze and then more aggressive cost actions necessary to save the company</li> </ul>	<ul style="list-style-type: none"> <li>– What significant spending can be stopped, deferred or slowed down without risk to the business operations or penalty?</li> <li>– What spending is underway that is essential to our recovery?</li> <li>– What controls do we need to ensure compliance?</li> </ul>
<b>Supporting Examples</b> <i>(What other businesses did?)</i>	<b>Decision Making Risks</b> <i>(What to avoid?)</i>
<ol style="list-style-type: none"> <li>1. Reviewed all non-contracted projects and initiatives in process to renegotiate with suppliers</li> <li>2. Paused any non-essential programs, e.g., product training, but continued upskilling for sales reps</li> <li>3. Cancelled sub-contractor assignments and re-allocated work internally</li> </ol>	<ul style="list-style-type: none"> <li>– Cutting leaders off from expertise or resources they need to get it done right, quickly, and without risking burnout in the process</li> <li>– Stopping strategic projects that are essential for recovery such as those generating cost savings or improving revenue generation</li> <li>– Avoiding freezing expenses over potential negative reactions from employees or other stakeholders</li> </ul>

**ELEMENT: Set interim budget and cash-flow forecast based on projected declines in core revenue streams**

<b>Additional Element Details</b> <i>(What else is included?)</i>	<b>Guiding Questions</b> <i>(What leaders need to ask?)</i>
<ul style="list-style-type: none"> <li>- Initial eight to twelve week projection that reflects cost cutting / freeze efforts, cash position, collection projections, and revenue impact</li> <li>- Projected revenue declines should be conservative and reflect potential for full or partial shut down</li> </ul>	<ul style="list-style-type: none"> <li>- What are our revenue projections for next 60 - 90 days?</li> <li>- What expenses will we incur during this period, after cuts and deferrals are taken into consideration?</li> <li>- What is our cash flow projection as a result?</li> </ul>
<b>Supporting Examples</b> <i>(What other businesses did?)</i>	<b>Decision Making Risks</b> <i>(What to avoid?)</i>
<ol style="list-style-type: none"> <li>1. Considered worst case scenario of full closer to create a business survival budget</li> <li>2. Included triggers in the budget, so dynamic and responsive as new information emerged daily</li> <li>3. Tasked each leader with providing inputs to ensure right people involved</li> </ol>	<ul style="list-style-type: none"> <li>- Being overly optimistic or pessimistic in creating revenue projections</li> <li>- Treating certain expenses as fixed which limits creative problem solving</li> <li>- Setting one budget that does not evolve over the period based on new data</li> </ul>

**ELEMENT: Pivot resources to mitigate loss of primary revenue sources and to generate or grow non-traditional sources**

<b>Additional Element Details</b> <i>(What else is included?)</i>	<b>Guiding Questions</b> <i>(What leaders need to ask?)</i>
<ul style="list-style-type: none"> <li>- Identifying lines of business or revenue sources that will not be impacted in same way</li> <li>- Identifying other revenue generating options</li> <li>- Fast tracking plans to secure new sources of revenue if viable</li> </ul>	<ul style="list-style-type: none"> <li>- What lines of business can we grow or solidify during this phase (still in demand)?</li> <li>- What non-traditional sources of revenue might we be able to grow or add?</li> <li>- How can we shift our offer to be more competitive and generate immediacy?</li> </ul>
<b>Supporting Examples</b> <i>(What other businesses did?)</i>	<b>Decision Making Risks</b> <i>(What to avoid?)</i>
<ol style="list-style-type: none"> <li>1. Increased efforts (and spending) to offload inventory for immediate cash infusion</li> <li>2. Created new packages / kits for re-sell direct to consumer, which simplifies purchasing process during store closures</li> <li>3. Re-targeted past customers with promotional offerings to generate quick sales (shorter buying cycle given existing relationship)</li> </ol>	<ul style="list-style-type: none"> <li>- Maintaining status quo thinking and not generating options for revenue generation, even if on smaller scale</li> <li>- Dramatically dropping prices as creates challenges when shift to recovery</li> <li>- Making decisions with long term negative ramifications, e.g., cutting out 'middle man'</li> </ul>

**ELEMENT: Review cost structure to determine opportunities for savings, deferral of expense or optimization**

<b>Additional Element Details</b> <i>(What else is included?)</i>	<b>Guiding Questions</b> <i>(What leaders need to ask?)</i>
<ul style="list-style-type: none"> <li>– Comprehensive look at all aspects of the existing business model and practices to determine where opportunities to make changes to conserve cash</li> <li>– Focus is on business expenditures and practices excluding employee headcount to determine options to avoid reducing workforce</li> </ul>	<ul style="list-style-type: none"> <li>– What do we spend money (or too much) on our business that we do not need to moving forward?</li> <li>– Where are their opportunities to improve our practices to free up cash?</li> <li>– Where do we lose money that we could minimize with changes to our practices?</li> </ul>
<b>Supporting Examples</b> <i>(What other businesses did?)</i>	<b>Decision Making Risks</b> <i>(What to avoid?)</i>
<ol style="list-style-type: none"> <li>1. Suspended all car allowance payments given employees not using vehicles for work</li> <li>2. Implemented new inventory management practices to reduce working capital required</li> <li>3. Increased quality controls to minimize errors and cost overruns</li> </ol>	<ul style="list-style-type: none"> <li>– Cutting too deeply and hurting the business’ ability to quickly recover</li> <li>– Taking too much of a black and white or bottom-line approach, risking the bigger picture of business investments</li> <li>– Treating things as ‘sacred’ and not considering ALL opportunities to generate savings or optimization</li> </ul>

**ELEMENT: Outline scenarios and how translate into revenue decline, cash flow implications and P&L impact**

<b>Additional Element Details</b> <i>(What else is included?)</i>	<b>Guiding Questions</b> <i>(What leaders need to ask?)</i>
<ul style="list-style-type: none"> <li>– Include best, worst and mid-case as well as ‘in-between’ points that trigger other actions</li> <li>– Consider duration and extent of revenue decline, degree of closure, time to recover to pre-crisis revenue levels</li> <li>– Include extreme downside scenario of 12 - 18 month recovery</li> </ul>	<ul style="list-style-type: none"> <li>– For each scenario, what does it look like financially for our business?</li> <li>– For each scenario, how much cost cutting will be required to remain financially viable?</li> <li>– For each scenario, what assumptions are we making that need to be validated?</li> </ul>
<b>Supporting Examples</b> <i>(What other businesses did?)</i>	<b>Decision Making Risks</b> <i>(What to avoid?)</i>
<ol style="list-style-type: none"> <li>1. Factored in forced 2-week closure for COVID outbreak in facility</li> <li>2. Included lost productivity of staff working from home with children present in revenue projections</li> <li>3. Included lost productivity resulting from implementing distancing on site</li> </ol>	<ul style="list-style-type: none"> <li>– Cutting leaders off from expertise or resources they need to get it done right, quickly, and without risking burnout in the process</li> <li>– Stopping strategic projects that are essential for recovery such as those generating cost savings or improving revenue generation</li> <li>– Avoiding freezing expenses over potential negative reactions from employees or other stakeholders</li> </ul>

**ELEMENT: Secure government financial supports including wage subsidies, loans, credits and deferred payments**

<b>Additional Element Details</b> <i>(What else is included?)</i>	<b>Guiding Questions</b> <i>(What leaders need to ask?)</i>
<ul style="list-style-type: none"> <li>– Variety of options for financial support being offered with different implications longer term for the business</li> <li>– Need to explore ‘what-if’ when considering the options, not just eligibility, to ensure it’s the right approach</li> </ul>	<ul style="list-style-type: none"> <li>– What options are available from the government?</li> <li>– What options do we qualify for? How can we best use the options to our advantage?</li> <li>– What options ensure our survival and which may hurt us longer term?</li> <li>– What do we need to plan for if secure options?</li> </ul>
<b>Supporting Examples</b> <i>(What other businesses did?)</i>	<b>Decision Making Risks</b> <i>(What to avoid?)</i>
<ol style="list-style-type: none"> <li>1. Took HST deferral, however, built a repayment plan into interim budget</li> <li>2. Pursuing wage subsidy as eligible, but only topping up certain roles, recognizing cannot afford to do it for everyone</li> <li>3. Using government loan to advance strategic initiatives that ready them for recovery faster than if funded internally</li> </ol>	<ul style="list-style-type: none"> <li>– Refusing to accept government support out of a sense of pride or discomfort</li> <li>– Making short term decisions that may have long term impacts given actual duration is unknown</li> </ul>

**Section 2: People Considerations**

As leaders, we have spent a long time building our team and cultivating the performance of the people who work for us. It is why people related decisions are always the toughest to make. While we would all like to keep these people that we have invested in, conservation planning requires leaders to take an objective look at employees, setting aside relationships, history and personal biases. There may be performance legacies that need addressing, and our structure may not be the right one to facilitate our recovery. Hopefully, with government support, we can maintain our workforce, however, it is still an ideal time to consider addressing any people-related challenges in the business.

**ELEMENT: Identify and secure critical roles, functions and people essential through to recovery phase**

<b>Additional Element Details</b> <i>(What else is included?)</i>	<b>Guiding Questions</b> <i>(What leaders need to ask?)</i>
<ul style="list-style-type: none"> <li>– Roles that are essential to the continuity and functioning of the business, as well as for its quick recovery</li> <li>– Functions that are critical given specialized expertise or role in generating cash flow</li> <li>– Individuals who are high performers, flexible contributors who can do more or who have specific knowledge or expertise</li> </ul>	<ul style="list-style-type: none"> <li>– What roles and/or functions will ensure our survival over next 3 months?</li> <li>– What roles and/or functions will position us to recovery quickly post ‘pause’?</li> <li>– Which individuals are essential to our business now and moving forward?</li> </ul>
<b>Supporting Examples</b> <i>(What other businesses did?)</i>	<b>Decision Making Risks</b> <i>(What to avoid?)</i>
<ol style="list-style-type: none"> <li>1. Identified a core group in Payroll as critical given the transitioning on and off of people</li> <li>2. Designated key individuals as ‘essential’ and communicated their role moving forward to give them a sense of security</li> <li>3. Separated sales reps based on skill sets and identified those skills essential to recovery</li> </ol>	<ul style="list-style-type: none"> <li>– Protecting individuals or functions from sense of loyalty (not being objective)</li> <li>– Not considering whether some internal functions could be outsourced to increase flexibility, lower costs</li> <li>– Not securing key individuals, leaving them in possible state of anxiety, for fear of upsetting others</li> </ul>

**ELEMENT: Identify performance issues, risks and gaps to determine who should go first, who should not return**

<b>Additional Element Details</b> <i>(What else is included?)</i>	<b>Guiding Questions</b> <i>(What leaders need to ask?)</i>
<ul style="list-style-type: none"> <li>– Objective consideration of actual performance levels of employees as well as potential to step up during recovery and take on more</li> <li>– Assessment of whether the individual is right fit for the recovery team (behavioral issues will be even more challenging during recovery)</li> <li>– Acknowledging performance issues that have been tolerated / gone unaddressed</li> </ul>	<ul style="list-style-type: none"> <li>– Who are our lowest performers that we can no longer carry moving forward?</li> <li>– What employees create disruption, difficulty and dysfunction that should not be part of recovery?</li> <li>– Where do we have risks related to an individual’s performance but the individual cannot be moved out?</li> </ul>
<b>Supporting Examples</b> <i>(What other businesses did?)</i>	<b>Decision Making Risks</b> <i>(What to avoid?)</i>
<ol style="list-style-type: none"> <li>1. Moved non-performers immediately to working notice or terminated with severance where feasible based on dollar value</li> <li>2. Terminated all employees still in probationary period who were not performing at highest levels</li> <li>3. Reset performance expectations to actively manage performance issues out</li> </ol>	<ul style="list-style-type: none"> <li>– Refusing to terminate employees that need to go with the idea of conserving cash (short term thinking - use it as their ‘working notice’ instead)</li> <li>– Believing performance is ‘unchangeable’ and there is nothing that you can do, instead of being creative about supporting performance, especially in key roles</li> </ul>

**ELEMENT: Evaluate how to ‘right size’ the structure without impacting recovery**

<b>Additional Element Details</b> <i>(What else is included?)</i>	<b>Guiding Questions</b> <i>(What leaders need to ask?)</i>
<ul style="list-style-type: none"> <li>– Levels of hierarchy, span of control, number of incumbents, reporting relationships are all part of the structure that require review</li> <li>– Analysis of cost of work based on level of role and salary paid to complete work to ensure work is being done by the least expensive role capable</li> </ul>	<ul style="list-style-type: none"> <li>– Where do we have too many layers or too many incumbents at same level relative to volume of work now and in foreseeable future?</li> <li>– What functions or roles can we combine to reduce the cost of operating through to recovery?</li> <li>– How can we optimize the cost of the structure and get work performed at the lowest cost?</li> </ul>
<b>Supporting Examples</b> <i>(What other businesses did?)</i>	<b>Decision Making Risks</b> <i>(What to avoid?)</i>
<ol style="list-style-type: none"> <li>1. Identified long-standing structural issues and developed plans to address as move forward</li> <li>2. Where multiple incumbents in same role, prioritized reduction of lowest performers</li> <li>3. Developed structures for each revenue scenario to determine right organizational model</li> </ol>	<ul style="list-style-type: none"> <li>– Holding on to senior leaders, especially those underperforming or costly, and cutting professional and admin level staff instead</li> <li>– Not being creative about blending functions which is commonly done when organizations are smaller</li> </ul>

**ELEMENT: Identify people-related cash conservation alternatives to reduction that may be implemented immediately**

<b>Additional Element Details</b> <i>(What else is included?)</i>	<b>Guiding Questions</b> <i>(What leaders need to ask?)</i>
<ul style="list-style-type: none"> <li>- Consider wage reductions, government subsidies, job sharing, early / encouraged retirement, rolling leaves of absence, cancellation of non-essential benefits to conserve cash</li> <li>- Explore ideas with leaders and teams, as some employees may opt for work share or early retirement given personal circumstances</li> </ul>	<ul style="list-style-type: none"> <li>- What other options do we have to reduce employee related costs without laying off staff?</li> <li>- Are there any opportunities to be creative around work and retirement arrangements, that conserve cash without impacting recovery</li> </ul>
<b>Supporting Examples</b> <i>(What other businesses did?)</i>	<b>Decision Making Risks</b> <i>(What to avoid?)</i>
<ol style="list-style-type: none"> <li>1. Negotiated with individuals that would not be suitable for recovery phase to retire</li> <li>2. Identified where work volume had dropped, and gave teams option of layoff or job share, which allowed for continuation of benefits</li> <li>3. Implemented 25% cut in salaries for senior leaders</li> </ol>	<ul style="list-style-type: none"> <li>- Protecting salaries and benefits out of personal interest</li> <li>- Avoiding these options over concerns as to how employees will react</li> <li>- Not pursuing discussions on early retirement out of loyalty or personal considerations</li> </ul>

**ELEMENT: Establish order and approach to reducing workforce (workforce reduction plan)**

<b>Additional Element Details</b> <i>(What else is included?)</i>	<b>Guiding Questions</b> <i>(What leaders need to ask?)</i>
<ul style="list-style-type: none"> <li>- Development of detailed reduction plan including order of reductions – whether done in waves, all at once, by functional area, etc.</li> <li>- Includes triggering events to determine timing</li> <li>- Prioritizes reduction of non-performers, and protects critical roles, people and functions</li> </ul>	<ul style="list-style-type: none"> <li>- What roles or individuals will be first in our reduction plan, and not returning for recovery?</li> <li>- What roles and individuals will be next in our reduction plan and how will we approach each?</li> <li>- What events will trigger the timing for each</li> </ul>
<b>Supporting Examples</b> <i>(What other businesses did?)</i>	<b>Decision Making Risks</b> <i>(What to avoid?)</i>
<ol style="list-style-type: none"> <li>1. Established decision making criteria for each area of the business that recognized its not one size fits all for reduction planning</li> <li>2. Committed to preserving as many people as possible, but not necessarily keeping them whole</li> <li>3. Terminated poor performing employees despite laying off peers to send a clear message</li> </ol>	<ul style="list-style-type: none"> <li>- Not creating a reduction plan (even if you never have to use it)</li> <li>- Treating everyone the same in the reduction process, and not recognizing what the business will need for recovery as you carry out steps for conservation</li> </ul>

**Section 3: Workplace & Cultural Considerations**

When focused on the survival of the business, it is easy to deprioritize thinking about the culture and workplace. After all, we first need to ensure that there will be one. However, it is essential that leaders take right action in the eyes and hearts of employees during this time, as that will set the stage for their engagement in your recovery. Many organizations have invested heavily in building a culture that is unique, and a key part of their competitive differentiation. Now is not the time to lose that, but to invest in its continuity through the conservation phase so that you are well positioned with your people for recovery.

**ELEMENT: Secure the health, safety and well-being of employees**

<b>Additional Element Details</b> <i>(What else is included?)</i>	<b>Guiding Questions</b> <i>(What leaders need to ask?)</i>
<ul style="list-style-type: none"> <li>- Ensuring employees have a safe work environment and adapting work practices to protect employee health</li> <li>- Being transparent with communications about these measures as well as COVID-19 outbreaks</li> </ul>	<ul style="list-style-type: none"> <li>- How do we need to adapt our work practices to keep our employees safe?</li> <li>- How will we continue to function safely and productively through these adaptations?</li> <li>- How will we respond to probable and confirmed cases of COVID-19 amongst our employees?</li> </ul>
<b>Supporting Examples</b> <i>(What other businesses did?)</i>	<b>Decision Making Risks</b> <i>(What to avoid?)</i>
<ol style="list-style-type: none"> <li>1. Provided very clear expectations around employee behaviour with consequences</li> <li>2. Provided all employees with 80-hours of paid time for them to use as needed to stay home if sick or needing to care for someone who is</li> <li>3. Committed to immediately closing any location or site upon confirmed case for 2-weeks</li> </ol>	<ul style="list-style-type: none"> <li>- Trying to hold on to business as usual practices</li> <li>- Not making it clear to employees to stay home and giving them financial support to ensure they do if have possible contact with COVID-19</li> <li>- Downplaying possible contact to avoid potentially upsetting or scaring people</li> </ul>

**ELEMENT: Align decisions to guiding principles / values of organization**

<b>Additional Element Details</b> <i>(What else is included?)</i>	<b>Guiding Questions</b> <i>(What leaders need to ask?)</i>
<ul style="list-style-type: none"> <li>- Reconfirming the company’s values or principles and how they will be held central in all decision making</li> <li>- Identifying other guiding principles that the leaders will use during this time to facilitate best decisions</li> <li>- Protecting against decisions that will harm the reputation of the leaders and the organization</li> </ul>	<ul style="list-style-type: none"> <li>- What guiding principles will we use to make decisions as leaders during this time?</li> <li>- What is most important for us to protect? What is most important for us to create or build?</li> <li>- How do we want to be seen while we lead through this crisis and into recovery?</li> </ul>
<b>Supporting Examples</b> <i>(What other businesses did?)</i>	<b>Decision Making Risks</b> <i>(What to avoid?)</i>
<ol style="list-style-type: none"> <li>1. Added a ‘with abundance of caution’ mindset to their guiding principles</li> <li>2. Identified three critical priorities based on their values to simplify their decision making during the crisis</li> <li>3. Each decision was tested as to whether it was ‘right action’ or ‘fear action’</li> </ol>	<ul style="list-style-type: none"> <li>- Making emotionally-driven or subjective decisions which come from fear and survival-based reactions (fight, flight, freeze)</li> <li>- Making decisions to avoid conflict or upsetting employees vs. taking right action</li> </ul>

**ELEMENT: Define communication strategy including “in-person” and two-way**

<b>Additional Element Details</b> <i>(What else is included?)</i>	<b>Guiding Questions</b> <i>(What leaders need to ask?)</i>
<ul style="list-style-type: none"> <li>– Detailed approach to communicating to employees and other stakeholders</li> <li>– Involves multiple approaches including opportunities to be seen and engage two way</li> <li>– Defining of new standards for transparency, honesty, empathy and voice in communications</li> </ul>	<ul style="list-style-type: none"> <li>– What are the key messages that we need to deliver? How will we deliver them?</li> <li>– What approaches do we need to take to support employees through this crisis?</li> <li>– What role will different leaders play in the communication process?</li> </ul>
<b>Supporting Examples</b> <i>(What other businesses did?)</i>	<b>Decision Making Risks</b> <i>(What to avoid?)</i>
<ol style="list-style-type: none"> <li>1. CEO started recording and distributing weekly videos with more personal anecdotes, giving employees a different lens into him</li> <li>2. Senior leaders launched weekly virtual town halls with employees, letting them submit questions</li> <li>3. Company launched a website for current and laid off employees as a one stop shop for everything</li> </ol>	<ul style="list-style-type: none"> <li>– Only using communication approaches that are within your comfort zone</li> <li>– Not considering psychological safety of employees and the role communication plays in it</li> <li>– Relying on one approach or one leader, and not delegating communications to ‘best’ ones to do it</li> </ul>

**ELEMENT: Establish new rules or guidelines for working in new context**

<b>Additional Element Details</b> <i>(What else is included?)</i>	<b>Guiding Questions</b> <i>(What leaders need to ask?)</i>
<ul style="list-style-type: none"> <li>– Expectations for working from home, participating in video calls, availability, responsiveness, etc.</li> <li>– New performance and productivity requirements, that consider other factors that may impact</li> <li>– Behavioural expectations relating to emotional self-management, team interactions and communications</li> </ul>	<ul style="list-style-type: none"> <li>– What is the performance and behaviour that we require from employees to maintain productivity?</li> <li>– What rules do we want employees to follow when working at home or on site during this period?</li> <li>– What prior performance gaps might we address now by introducing clear expectations and rules?</li> </ul>
<b>Supporting Examples</b> <i>(What other businesses did?)</i>	<b>Decision Making Risks</b> <i>(What to avoid?)</i>
<ol style="list-style-type: none"> <li>1. Clarified work from home dress code (no pajamas), work environment (not on bed), etc.</li> <li>2. Employees being paid but without sufficient workload, reassigned or given developmental activities to be completed</li> <li>3. Flexed hours of work to recognize parents working from home with kids who cannot separate in same way as in office</li> </ol>	<ul style="list-style-type: none"> <li>– Tolerating poor performance and ineffective behaviour under the guise of being ‘supportive’</li> <li>– Introducing new ‘rules’ given all the change already happening (its what everyone needs)</li> <li>– Allowing employees to do whatever they feel like even though being paid</li> </ul>

**ELEMENT: Establish new traditions for maintaining engagement and cultural continuity as employees are impacted**

<b>Additional Element Details</b> <i>(What else is included?)</i>	<b>Guiding Questions</b> <i>(What leaders need to ask?)</i>
<ul style="list-style-type: none"> <li>– Identifying all the elements of your workplace culture that employees appreciate and that foster a sense of teamwork and belonging</li> <li>– Identifying options for continuing, modifying or introducing new ones in the current environment</li> <li>– Determining how to keep employees engaged and supported in a consistent, predictable way</li> </ul>	<ul style="list-style-type: none"> <li>– What do employees need to continue to feel connected to their leaders and the organization?</li> <li>– How can we replace our in-person activities that foster connections and reinforce our culture in our new workplace norms?</li> <li>– How do leaders ensure that cultural continuity is a priority so that time is invested in these activities?</li> </ul>
<b>Supporting Examples</b> <i>(What other businesses did?)</i>	<b>Decision Making Risks</b> <i>(What to avoid?)</i>
<ol style="list-style-type: none"> <li>1. Friday wrap up virtual “cocktail” hour</li> <li>2. Daily virtual huddle first thing in the morning to say hello, kick day off, and remain connected</li> <li>3. Weekly learning spotlight where each team member shares something that they learned during the week, or pushed themselves out of their comfort zone to do</li> </ol>	<ul style="list-style-type: none"> <li>– Not prioritizing the need to create the structure for social connections that naturally occur in the office or site environment for your team</li> <li>– Being so busy that you are unavailable to team members for consistent and predictable connections</li> <li>– Not personalizing your interactions to maintain your own preference for privacy</li> </ul>

**Section 4: Leadership Considerations**

During times of crisis, an organization’s leaders often get overlooked. The reality is that not all leaders have the skills necessary to lead through a crisis like the one created by COVID-19, or the skills to lead the organization into recovery. Equally, times like this push our leaders as they bear the burden of the work, and burn out is a risk, if we are not proactively considering what they need to remain effective during the crisis and into recovery. It is constantly being said that this is a marathon and not a sprint, so we need to consider that in how we plan our approach to leading. Finally, if there were any conflicts, behavioural challenges or dysfunctions in place – all part of our normal realities as organizations – a crisis like this can cause them to escalate and undermine leadership effectiveness at a critical time.

**ELEMENT: Assess skills of the organization’s leaders to lead effectively during conservation and recovery**

<b>Additional Element Details</b> <i>(What else is included?)</i>	<b>Guiding Questions</b> <i>(What leaders need to ask?)</i>
<ul style="list-style-type: none"> <li>– Objective assessment of strengths and weaknesses of individual leaders</li> <li>– Analysis of gaps between skills needed to lead through crisis and recovery vs. skills of team</li> <li>– Identification of other organizational leaders or external resources required to strengthen team</li> </ul>	<ul style="list-style-type: none"> <li>– Do our key senior leaders have the skills to meet all or some of the challenge?</li> <li>– What critical skills are our leaders / leadership team missing that may undermine effectiveness?</li> <li>– Who else can help to ensure our effectiveness and capacity to lead?</li> </ul>
<b>Supporting Examples</b> <i>(What other businesses did?)</i>	<b>Decision Making Risks</b> <i>(What to avoid?)</i>
<ol style="list-style-type: none"> <li>1. Leveraged external experts strategically</li> <li>2. Brought non-executive leaders into the discussions based on skills and capabilities</li> <li>3. Set up process for delegating to sub-groups with differing skill sets vs. trying to do it all themselves</li> </ol>	<ul style="list-style-type: none"> <li>– Thinking senior leaders are good at everything, regardless of actual evidence of skills</li> <li>– Not recognizing that different skill sets and perspectives are required to navigate the crisis</li> <li>– Avoiding dealing with leadership gaps</li> </ul>

**ELEMENT: Set up dedicated war-room team to deliver critical business action plans**

<b>Additional Element Details</b> <i>(What else is included?)</i>	<b>Guiding Questions</b> <i>(What leaders need to ask?)</i>
<ul style="list-style-type: none"> <li>– Identifying key leaders who will run the planning process which may be different from exec team</li> <li>– Create a space (time, structure, process) to facilitate the planning</li> <li>– Support the individuals by back filling on other projects and/or providing resources to delegate to</li> </ul>	<ul style="list-style-type: none"> <li>– Who are the best 3 - 4 people to be at the centre of our action planning approach?</li> <li>– How will this group function? How will it report and get approval on its recommended plans?</li> <li>– How do we ensure their success while protecting business as usual activities?</li> </ul>
<b>Supporting Examples</b> <i>(What other businesses did?)</i>	<b>Decision Making Risks</b> <i>(What to avoid?)</i>
<ol style="list-style-type: none"> <li>1. Appointed CIO to lead war room team given expertise in Agile and heavy reliance on technology for business continuity</li> <li>2. Assigned leader from operations, HR and finance to drive the action planning (recommended)</li> <li>3. Set the CEO to focus on government, supplier and employee relations, while rest of team focused on business conservation planning</li> </ol>	<ul style="list-style-type: none"> <li>– Believing that the entire executive team as it exists today is the right war-room team</li> <li>– Not defining clear deliverables and timelines, as well as parameters for action planning</li> <li>– Centralizing decision making to one person who is being autocratic (not listening to team)</li> </ul>

**ELEMENT: Identify how best to support leaders**

<b>Additional Element Details</b> <i>(What else is included?)</i>	<b>Guiding Questions</b> <i>(What leaders need to ask?)</i>
<ul style="list-style-type: none"> <li>– Assess capabilities of leaders with respect to communications and change management</li> <li>– Identify support, resources and skill development required to effectively lead</li> <li>– Identify how to support personal well-being</li> </ul>	<ul style="list-style-type: none"> <li>– How effective are our leaders with communicating, managing change &amp; performance?</li> <li>– What do we need to give our leaders so that they can be effective through the transition?</li> <li>– How do we protect our leaders from burn out and other mental health challenges?</li> </ul>
<b>Supporting Examples</b> <i>(What other businesses did?)</i>	<b>Decision Making Risks</b> <i>(What to avoid?)</i>
<ol style="list-style-type: none"> <li>1. Provided leaders with talking points every day on messages as well as answers to frequently asked questions from employees</li> <li>2. Gave leaders access to group coaching support and opportunity to talk to each other about challenges</li> <li>3. Paired high effective communicators with less effective leaders to support</li> </ol>	<ul style="list-style-type: none"> <li>– Thinking the leaders do not need support, only the employees</li> <li>– Believing all leaders have the same skill set and are comfortable with delivering these types of messages to employees</li> <li>– Ignoring the risk of burnout in your leaders, leaving them without personal reserves to lead through recovery</li> </ul>

**ELEMENT: Address leadership conflicts, behavioural gaps and dysfunctions (e.g., silos) that will interfere**

<b>Additional Element Details</b> <i>(What else is included?)</i>	<b>Guiding Questions</b> <i>(What leaders need to ask?)</i>
<ul style="list-style-type: none"> <li>– Identifying and addressing behaviour that undermines the effectiveness of the team</li> <li>– Establishing new norms of behaviour, what need to start doing / stop doing</li> <li>– Implementing issue resolution and decision-making practices that minimize conflict</li> </ul>	<ul style="list-style-type: none"> <li>– What leadership and team behaviours did we complain about prior to the crisis that need to be addressed?</li> <li>– What behaviours do we need to start to increase our effectiveness? Stop?</li> <li>– What approach will we take to resolving issues to prevent reactions and conflict?</li> </ul>
<b>Supporting Examples</b> <i>(What other businesses did?)</i>	<b>Decision Making Risks</b> <i>(What to avoid?)</i>
<ol style="list-style-type: none"> <li>1. Removed a highly disruptive senior leader from the executive team after repeated requests to stop being defensive and reactive</li> <li>2. Established new rules of behaviour for the leaders, including not yelling or dismissing concerns raised</li> </ol>	<ul style="list-style-type: none"> <li>– Working around or avoiding dealing with conflicts amongst the leadership team</li> <li>– Not reflecting on how one’s own reactions, behaviours and fears might be contributing</li> <li>– Refusing to define rules for fear of how the group may react or own discomfort</li> </ul>

**WANT MORE SUPPORT ON HOW TO APPLY THESE CONSIDERATIONS IN YOUR ORGANIZATION’S CONTEXT?**

- ▶ Register for one of our upcoming webinars that drills even further down and provides you with the opportunity to get your questions answered. BILD will be co-facilitating these sessions with Heather Hilliard of Caliber Leadership Systems, who specializes in helping entrepreneurial organizations through major transitions including growth and recovery. Heather lent her expertise in the development of these resources for BILD.
- ▶ Join one of our upcoming ‘town halls’ to talk about recovery planning within your sector of the industry including discussions about your concerns and suggestions.
- ▶ Reach out to Heather directly, [hhilliard@caliberleadership.com](mailto:hhilliard@caliberleadership.com), to access support for your organization’s specific circumstances.