

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 that 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 Recovery Plan for your business so you can identify what you have done and what else you need to complete.

Please note: This Checklist provides general guidance that must be scaled and adjusted for your company. In a larger organization planning for recovery may involve a cross functional management team, while for smaller companies and sole proprietorships decisions, the owner/operator will make the key decisions and certain sections of this guide may not apply. References within the guide are meant to be directional and while terms used may not fit exactly with your internal structure or organization they should be used as a guide.

Business Model Considerations

- Review pre-crisis norms, beliefs and assumptions that influenced the business model
- Anticipate potential scenarios and impacts of the pandemic on the business post-COVID-19
- Define recovery model and strategy in terms of business, people and culture
- Identify potential barriers to quick and effective recovery (internal and external)
- Determine actions to implement now to build readiness for recovery

Market Considerations

- Develop virtual platforms and strategies to connect to customers, key stakeholders
- Define how you can expand your core products, services and experiences
- Rethink marketing strategy, sales channels, pricing model and customer confidence building
- Leverage innovation, community experience and social responsibility in offerings

People Considerations

- Determine new model for ensuring health and safety of employees and customers
- Identify roles changes, new or clarified performance expectations and accountability processes
- Develop process for recalling and re-onboarding employees that aligns to new expectations
- Build capacity for change management at all levels

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

RECOVERY PLANNING

COVID-19 Resource Guide

About This Resource Guide

This Resource Guide provides you with a step-by-step roadmap for establishing your Recovery Plan. It includes additional details or explanations for each element of the checklist, guiding questions to ensure you are able to define your plan, examples to clarify where relevant as well as potential risks to decision making. While some of these considerations may already have been covered off in your organization, there is value in reviewing the recommended approaches to ensure that you have considered all of them appropriately and effectively, in support of your company's ability to recover and thrive in the next phase.

Section 1: Business Model Considerations

The most critical consideration as we look towards recovery is how will the impact of the pandemic affect our business model and strategy. Our businesses and our markets will not simply return to the way they were pre-COVID-19 so it is essential to start to understand the ways in which things will be different and how that translates to the way we do business.

► STEP 1. REVIEW PRE-CRISIS NORMS, BELIEFS AND ASSUMPTIONS THAT INFLUENCED THE BUSINESS MODEL

| Why This Is Important | What to Cover | Possible Approaches |
|---|---|---|
| <ul style="list-style-type: none"> – Need to acknowledge all the underlying beliefs, assumptions and norms in order to challenge them and develop plans based on new reality vs. maintaining status quo – Opportunity for leaders to let go of past perceptions and more clearly understand how changing moving forward | <ul style="list-style-type: none"> – How work gets done by employees – How customers purchase – Customer decision making criteria – Government regulations – Supplier relations and capacity – Leadership requirements – Financial practices and disciplines | <ul style="list-style-type: none"> – Meeting with senior leaders to explore at organization-wide perspective – Task key functional leaders to look at own areas and report up |

► STEP 2. ANTICIPATE POTENTIAL SCENARIOS AND IMPACTS OF THE PANDEMIC ON THE BUSINESS POST-COVID-19

| Why This Is Important | What to Cover | Possible Approaches |
|---|--|---|
| <ul style="list-style-type: none"> – Need to explore all the possible ways in which the pandemic can impact on the business in order to develop targeted strategy – While can anticipate, not clear, so important to use most likely or a range of scenarios to generate best strategies to position business to thrive | <ul style="list-style-type: none"> – Expectations of customers, changing customer buying approaches and habits – Expectations of employees, changing work approaches and habits – Impact on government processes and capacity – Impact on suppliers, capacity and practices – Implications for health and safety management | <ul style="list-style-type: none"> – Gather data from 'experts' readily available and industry sources – Speak with key stakeholders as to how they anticipate their recovery / new normal – Task scenario development to internal experts |

► STEP 3. DEFINE RECOVERY MODEL AND STRATEGY IN TERMS OF BUSINESS, PEOPLE AND CULTURE

| Why This Is Important | What to Cover | Possible Approaches |
|--|--|--|
| <ul style="list-style-type: none"> – Existing business models and strategies will not be relevant post-COVID-19 and do not reflect the strategy for the recovery phase – Recovery model looks at short term as well as long term | <ul style="list-style-type: none"> – How business will respond to scenarios of impact through changes to its model and development of new strategies – Internal and external focus – model and strategies must address customer, suppliers, government, employees, culture, operations, technology and financial | <ul style="list-style-type: none"> – Key individuals in senior team with high orientation towards strategy development, innovative thinking, tolerance for ambiguity may be tasked with initial work on plan – Executive team to develop |

➤ STEP 4. IDENTIFY POTENTIAL BARRIERS TO QUICK AND EFFECTIVE RECOVERY (INTERNAL AND EXTERNAL)

| Why This Is Important | What to Cover | Possible Approaches |
|---|---|---|
| <ul style="list-style-type: none"> – Always barriers to moving from current reality to desired (or required) future state – Organizations that identify barriers and develop tactics to address are more successful in progressing towards vision – Ignoring the potential barriers prevents effective action planning and gets in the way of effective accountability | <ul style="list-style-type: none"> – Lack of internal capability to drive new approaches (e.g., digital) – Organizational weaknesses pre-pandemic (e.g., quality, on-time completion) – Behavioural and cultural norms that may prevent effective change management – Leadership gaps and ineffectiveness – External factors outside control and how to mitigate or get ahead of | <ul style="list-style-type: none"> – May be done with Executive team – Consider including key functional leaders or other high potential employees with different perspectives – Look at themes and trends to help focus action planning |

➤ STEP 5. DETERMINE ACTIONS TO IMPLEMENT NOW TO BUILD READINESS FOR RECOVERY

| Why This Is Important | What to Cover | Possible Approaches |
|---|--|--|
| <ul style="list-style-type: none"> – Potential barriers need to be tackled now, before start moving towards actual recovery as part of approach to building readiness – Need to identify what capabilities missing to tackle new realities and strategies so can start building or adding now – Capacity of employees and leaders allows organization to get ahead on some of the requirements | <ul style="list-style-type: none"> – Capability building in terms of upskilling, cross-training, development as well as adding key expertise required – Process / program improvement, disciplined / standardized approaches – Infrastructure development including technology – Stakeholder / supplier relationship development – Strategic customer development – Leadership effectiveness and change management | <ul style="list-style-type: none"> – Action planning should be cascaded through organization so each key function and team have specific plan of action – Identify need for external support <ul style="list-style-type: none"> – do not wait till entering into recovery as leaders and employees may become too busy with getting back to business |

Section 2: Market Considerations

COVID-19 will create a lasting change on human attitudes and behaviours. It will forever change the experience of being a customer for our businesses, and this behavioural change will continue to evolve for some time to come. To prepare for the recovery and ultimately, rebuilding of our businesses, we need to think about how these changes to attitudes and behaviours need to affect the way we approach our market.

➤ DEVELOP VIRTUAL PLATFORMS AND STRATEGIES TO CONNECT TO CUSTOMERS, KEY STAKEHOLDERS

| Why This Is Important | What to Cover | Possible Approaches |
|--|--|---|
| <ul style="list-style-type: none"> – COVID-19 is the catalyst for shifting everyone to adopt digital practices and many will not want to go back – Companies will seek to transform virtual experiences to differentiate themselves – Virtual connections and communities will continue to be a priority post pandemic – Companies will need to reimagine virtual communications, commerce and brand experiences | <ul style="list-style-type: none"> – How to shift sales and customer support to online longer term and continue to enhance the brand experience – Transition strategies from current reality to recovery phase including how to get customer back out – New experiences and virtual spaces to create and enhance customer connections – How virtual and real experiences co-exist and complement each other – Processes to listen and respond | <ul style="list-style-type: none"> – Identify in-house experts to lead development of strategies and solutions – Resource external experts to compliment internal team – Engage front-line employees to generate ideas and test potential approaches |

▷ **DEFINE HOW YOU CAN EXPAND YOUR CORE PRODUCTS, SERVICES AND EXPERIENCES**

| Why This Is Important | What to Cover | Possible Approaches |
|---|--|--|
| <ul style="list-style-type: none"> – People may postpone purchases due to uncertainty or want different purchasing options in terms of products and services – Increased emphasis on ‘home’ and the familiar may cause people to seek out established, known brands – May be new market opportunities as ‘normal’ life resumes | <ul style="list-style-type: none"> – Core competencies of the organization – Changing needs of customers and buying patterns – Supplier gaps on either side of your offer – Related products and services (increase share of spend) – Modified products – Pre-pandemic needs unsatisfied | <ul style="list-style-type: none"> – Direct customer research / inquiry by customer facing teams – Industry reports and data analysis on projections – Supplier and competitor analysis, discussions (joint initiatives?) |

▷ **RETHINK MARKETING STRATEGY, SALES CHANNELS, PRICING MODEL AND CUSTOMER CONFIDENCE BUILDING**

| Why This Is Important | What to Cover | Possible Approaches |
|---|---|---|
| <ul style="list-style-type: none"> – Erosion of confidence will make trust even more important than before – Customer confidence will be low and organizations need to consider how to rebuild quickly through every channel – How customers view premium products, price points and value for dollar like to have evolved | <ul style="list-style-type: none"> – Brand health – Marketing strategy – Sales channels – Marketing and sales budgets – Product pricing, and product / pricing spectrum – Other factors influencing decisions | <ul style="list-style-type: none"> – Direct customer research / inquiry – Audit of existing practices – Roadmap customer need for products & services going forward – Leverage in-house expertise and challenge assumptions |

▷ **LEVERAGE INNOVATION, COMMUNITY EXPERIENCE AND SOCIAL RESPONSIBILITY IN OFFERINGS**

| Why This Is Important | What to Cover | Possible Approaches |
|--|---|--|
| <ul style="list-style-type: none"> – People may postpone purchases due to uncertainty or want different purchasing options in terms of products and services – Increased emphasis on ‘home’ and the familiar may cause people to seek out established, known brands – Maybe new market opportunities as ‘normal’ life resumes | <ul style="list-style-type: none"> – Reimagining of product / service, how households are innovating / reimagining home – How business can create value around health plus Health assessment of your product / service – Supply chain and how may be leveraged or negatively perceived – Role in community, social responsibility | <ul style="list-style-type: none"> – Run an innovation workshop – Triple bottom line commitment (people, planet, profit) – Expedite sustainability commitments through in-house dedicated teams – Identify strategic community investments |

Section 3: People Considerations

Our people are at the heart of our business and without their engagement the recovery of the business will be challenging. However, employees will be returning post-pandemic with different perspectives, changed personal circumstances and evolving expectations. As a business, how we interact with our employees and how we protect our workplaces will continue to transition in the months and years to come.

▷ **DETERMINE NEW MODEL FOR ENSURING HEALTH AND SAFETY OF EMPLOYEES AND CUSTOMERS**

| Why This Is Important | What to Cover | Possible Approaches |
|--|---|--|
| <ul style="list-style-type: none"> – Increased demands and expectations on businesses to provide healthy workplaces <ul style="list-style-type: none"> – physical and mental – New health and safety standards / operating requirements will impact on business practices (see Guidance Documents from Ontario government) – Returning employees may be struggling with new personal challenges including addiction | <ul style="list-style-type: none"> – New health measures and practices to be put into place in physical workspaces such as enhanced sanitation and screening – New operating practices that support worker and customer health such as staggered shifts, continued remote work, continuation of physical distancing – Mental health needs of returning employees and how best to support – Approaches to handling higher rates of mental health challenges stemming from isolation, financial and relationship stress | <ul style="list-style-type: none"> – Access resources provided by ministry and assign Joint Health & Safety Committees to plan – Survey employees to assess their mental and physical health to identify needs – Engage with EFAP and other service providers to set up return to work supports |

➤ **IDENTIFY ROLE CHANGES, NEW OR CLARIFIED PERFORMANCE EXPECTATIONS AND ACCOUNTABILITY PROCESSES**

| Why This Is Important | What to Cover | Possible Approaches |
|--|--|---|
| <ul style="list-style-type: none"> – Performance expectations and role definitions need to evolve as employees return to work during recovery – Clarity provides employees with much needed sense of stability, and expedites speed at which they are operating at full capacity – Zero tolerance of low performance during recovery is essential, set stage to actively drive accountability | <ul style="list-style-type: none"> – How the role has / will evolve based on the new reality, both immediate term and short to mid-term – How workplace processes and practices that impact role performance need to change and approach to implementing – New (or clarified) performance expectations, what is non-negotiable and how performance will be managed – How individuals will be held accountable, especially if not norm pre-pandemic | <ul style="list-style-type: none"> – Review organizational structure and roles based on new business model organizationally and by function / department – Equip leaders to redefine role expectations based on transition into recovery plus new model – Document standards, metrics, expectations, and non-negotiables – Strengthen performance-based leadership capabilities |

➤ **DEVELOP PROCESS FOR RECALLING AND RE-ONBOARDING EMPLOYEES THAT ALIGNS TO NEW EXPECTATIONS**

| Why This Is Important | What to Cover | Possible Approaches |
|---|---|---|
| <ul style="list-style-type: none"> – Workplace and cultural norms will be impacted, including changes to HR policies and work practices – Need to bring employees back to work, or reorient them as transition into recovery to ensure everyone aligned – Employees re-integration requires careful management of approach | <ul style="list-style-type: none"> – Updating of HR policies / employee manual to reflect new workplace requirements – Process for recalling including communications, timing, and steps in the process (collective and individual) – Expectations of leaders regarding assessment of employee readiness, performance, (re-) orientation and work management | <ul style="list-style-type: none"> – Gather input from employees and leaders regarding needs – Create tools and resources to facilitate including updated Policy Manual (sign off) – Prepare leaders to handle transition with empathy while directing performance |

➤ **BUILD CAPACITY FOR CHANGE MANAGEMENT AT ALL LEVELS**

| Why This Is Important | What to Cover | Possible Approaches |
|--|--|---|
| <ul style="list-style-type: none"> – Recovery represents a massive change management process for employees and leaders – Most do not have the skills or experience to navigate effectively plus brain prefers to maintain status quo – Change will be continuous in days and months to come, not a one-time event | <ul style="list-style-type: none"> – Change requirements, process and communications including key messages – Assess change capabilities of leaders and employees, where greatest risk – Build change readiness – what needs to happen now to get everyone ready – Development of change leadership capabilities | <ul style="list-style-type: none"> – Assign a Champion of change leadership in organization – Build a dedicated team focused on supporting leaders to plan and implement change effectively – Identify early adopters and create process of engagement |

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 worked with BILD on the development of these resources. *Watch for more details!*
- 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. *Watch for more details!*
- Reach out to Heather directly, hilliard@caliberleadership.com, with any questions and to access support for your organization’s specific circumstances.