

A person wearing a white lab coat is seen from the side, looking at a laptop. The laptop screen shows a video conference with a man in a dark suit and white shirt. The background is a blurred office setting. The overall image has a blue tint.

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**WEBINAR TOOLKIT**

Chief of Staff COVID-19  
Response Webinar

## CHIEF OF STAFF:

# Crisis Playbook

External crises are a natural part of high-performing organizations in competitive industries. When those situations arise, the best prepared organizations know their current approach does not fully meet the demands of the current reality. They also know that during such times Chiefs of Staff must play instrumental role in ensuring an organization rises to meet the challenge of the crisis.

McChrystal Group's "Leading Through Crisis Framework" grows out of our leader's lived experience fighting and overcoming crises in both war rooms and boardrooms over the last forty years. What their scars and experience taught them is this: During times of crisis, leaders should leverage a cyclical, iterative process to focus their efforts by rapidly moving from Assess to Align to Act.

Chiefs of Staff play an important role in every step of this process and are particularly critical in the Align Phase. To prepare you for that role, the following Playbook provides you with practical guidance in the areas of Developing a Prioritized plan, Cultivating 360-degree Communication, and supporting your Principal through this crisis. Not everything will apply to your specific situation, but our hope is that you will find useful insights and suggestions that will equip you to lead your organization through the challenges ahead.



# Develop a Prioritized Plan

Crises are a natural part of high-performing organizations in competitive industries. The checklist below offers a foundation from which you can help your principal build a prioritized plan that can be clearly articulated and easily executed.

## SET THE EXPECTATIONS

### Publish your 1-page priorities

- Are your priorities simple, clear, and actionable?
- Have you coordinated them with all stakeholders?
- Who decides on implementing these priorities?
- What actions will be delegated and to whom?
- How will you monitor execution of these priorities?
- What sources are you using to monitor the external cause and changes that would inform your priorities? Are these credible? Potential sources are:
  - Foreign, Federal, State, local government policies/directives
  - Medical authorities
  - Transportation authorities
  - Industry groups
- What sources are you using to assess the impact of the crisis on your stakeholders and adjust your priorities.
  - Customers
  - Suppliers/vendors
  - Employees/unions
  - Communities
- Which members of the team are responsible for updating leadership on changes?
- How often are you convening leadership to Assess, Align, and Act?

### Clarify what needs to stop

- Are your current objectives still valid?
- What assumptions have you made and are those still valid?
- Are there any low-impact actions on your list?
- Are there any actions that don't directly contribute to achieving your priorities?

## SET THE TEAM

### Split your forces

- Dedicate a team to crisis response to address challenges as they unfold.
  - Who's on the team?
  - Do they represent the company as a whole?
  - Are they strategically positioned?
  - Do they have enough elevation to understand the front lines up to the C-suite?
  - Who's the designated spokesperson?
  - Have they anticipated tough questions?
  - What guidance, if any, they have given the stakeholders? Work from home, work in small groups, etc.
  - What is their responsibility?
  - How often are they checking in?

### Conditions and Guidance

- Is crisis response team's guidance still valid? Has a change, internal or external, called for its adjustment?
- What parts of the organization (by function or geography) have reduced or diminished capacity due to this guidance? What are its effects on other parts of the organization and stakeholders?
- Does your current technology have sufficient capacity to support the crisis response? (Devices, bandwidth, applications)
- Which changes in your crisis response should remain in place post-crisis, and which should revert to pre-crisis?
- What is the potential effect of contemplated changes on your operations?
- What conditions need to exist for you to ramp up/down parts of the organization that are currently diminished/at full capacity? What will be the effect on other parts of the organization?
- What changes in the external environment represent threats or opportunities?
- Does the team have a contingency plan if the situation gets worse, or better?

# Cultivate 360° Communication

As mentioned above, crisis will happen in life of most organizations. It's not so much a matter of it, but when. Use this checklist as a starting point for how you can support your principal to make sense of the situation and communicate that narrative to the rest of the organization in order to address confusion, bewilderment, and disorientation.

## SET THE CLIMATE

### Be clear that change is imminent

- Do you have a good understanding of the current reality?
- Is your message factual?
- Is your message simple and clear?
- Can you leverage graphics or diagrams to illustrate your point and make it memorable?
- Who is the information gatherer?
- Have we incorporated credible updates from reliable sources?
- Does it include what's happening and what the organization is doing to address it?
- Does it provide actionable guidance and include the information people need?
- Are you expressing concern, empathy, and compassion?
- What are people feeling? What emotions need to be considered?
- Have you identified and disseminated Critical Information Requirements (CIRs) to your organization (if X happens, inform Y within Z hours)

### Break down barriers inhibiting inclusion

- Have you engaged stakeholders from a range of backgrounds?
- Are you easily accessible?
- Are you sensitive to the non-verbal messages you are communicating?
- Are you sharing your own stories of vulnerability, learning, and growth?
- Whose ideas/comments are you encouraging and praising?
- When do you shut people out versus listening?
- Are you open and honest about the organization's capabilities, needs, and problems?
- Have you considered at least one plausible alternative to the course of action being recommended?

## SET THE CONDITIONS

### Leverage the rule of 3

- Communicate at three times the frequency of the normal operating rhythm
  - Have you determined and communicated the new frequency for recurring meetings during a sprint period?
  - Have you revisited and revised agendas for all recurring meetings?
  - Do you leverage 3 channels (email, video, messenger, etc.) to push out major information?
  - Have you build standard meeting kick-off and sign-off points to quickly align the team?
  - Have you distributed and enforced guidance on audio discipline in remote meetings?
    - Remote forums should be joined in a quiet area
    - When speaking, meeting attendees need to introduce themselves with a name, title, and location
    - Speak at 75% speed and over-articulate your words
    - Ensure any microphone is well positioned
    - Dial in over the phone if the internet bandwidth is slow
    - When you're not speaking go on mute
    - Assume positive intent
    - Call all people by name, not by region or department
    - Let the controller lead the meeting
    - Turn off arrival/departure sounds

### Conduct an IT audit

- Test platforms, software, devices, and bandwidth to ensure success

### Utilize video

- Have you set expectations for employees to use video for richer, more effective communication?
- Have you set expectations for leveraging chat channels to keep things on track?
- Have you set expectations for and enforced recording recurring meetings?

# Responding to Crisis

Under stress, most people tend toward a fight, flight, or freeze response. With benefits and drawbacks to each response, recognizing your principal's typical response to stress will help you leverage the benefits and minimize the downsides.



BENEFITS	BENEFITS	BENEFITS
Decisive Fast Action-Oriented	Inclusive Builds coalitions Empathetic	Calm Data-driven decisions Thoughtful
DRAWBACKS	DRAWBACKS	DRAWBACKS
Moves too quickly Rash Overly directive	Overly consensus-driven Slow and inefficient Abdicates responsibility	Indecisive Analysis paralysis Gives little direction
How to Counterbalance?		
<ul style="list-style-type: none"> <li>• Close the information gap</li> <li>• Level set on priorities repeatedly everyday - overcommunicate the priorities</li> <li>• Translate your principal's intent and vision</li> <li>• Keep expectations in check</li> <li>• Resource the priorities and de-resource everything else</li> <li>• Keep your principal healthy: get ahead of CIR</li> </ul>	<ul style="list-style-type: none"> <li>• Create a decision forum (driven by crisis response team - productive conflict, diversity of thought)</li> <li>• Help the principal to identify the people-pleasing triggers to develop strategies and disrupt the pattern - CoS plays bad cop</li> <li>• Implement daily comms plan from principal to entire organizational priorities, decisions, actions</li> <li>• Keep your principal healthy: keep the principal emotionally connected</li> </ul>	<ul style="list-style-type: none"> <li>• Create a decision forum (involve SME, provide relevant data, COAs, highlight risks and mitigation plans)</li> <li>• Carve out time to think strategically - get out of fire fighting and think long term</li> <li>• Identify SME that the principal trusts and be sure they are on the crisis response team</li> <li>• Keep your principal healthy: Synthesize datadown to CIRs</li> </ul>

# Personal Action Plan

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Stop/Start/Continue is a valuable approach that you can constantly leverage to autopsy what has happened so far and how you can optimize a situation and develop next steps in the midst of a crisis.

**Stop:** What specific actions needs to stop?

**Start:** What specific actions makes most sense to execute on?

**Continue:** What specific actions continue to show positive results?

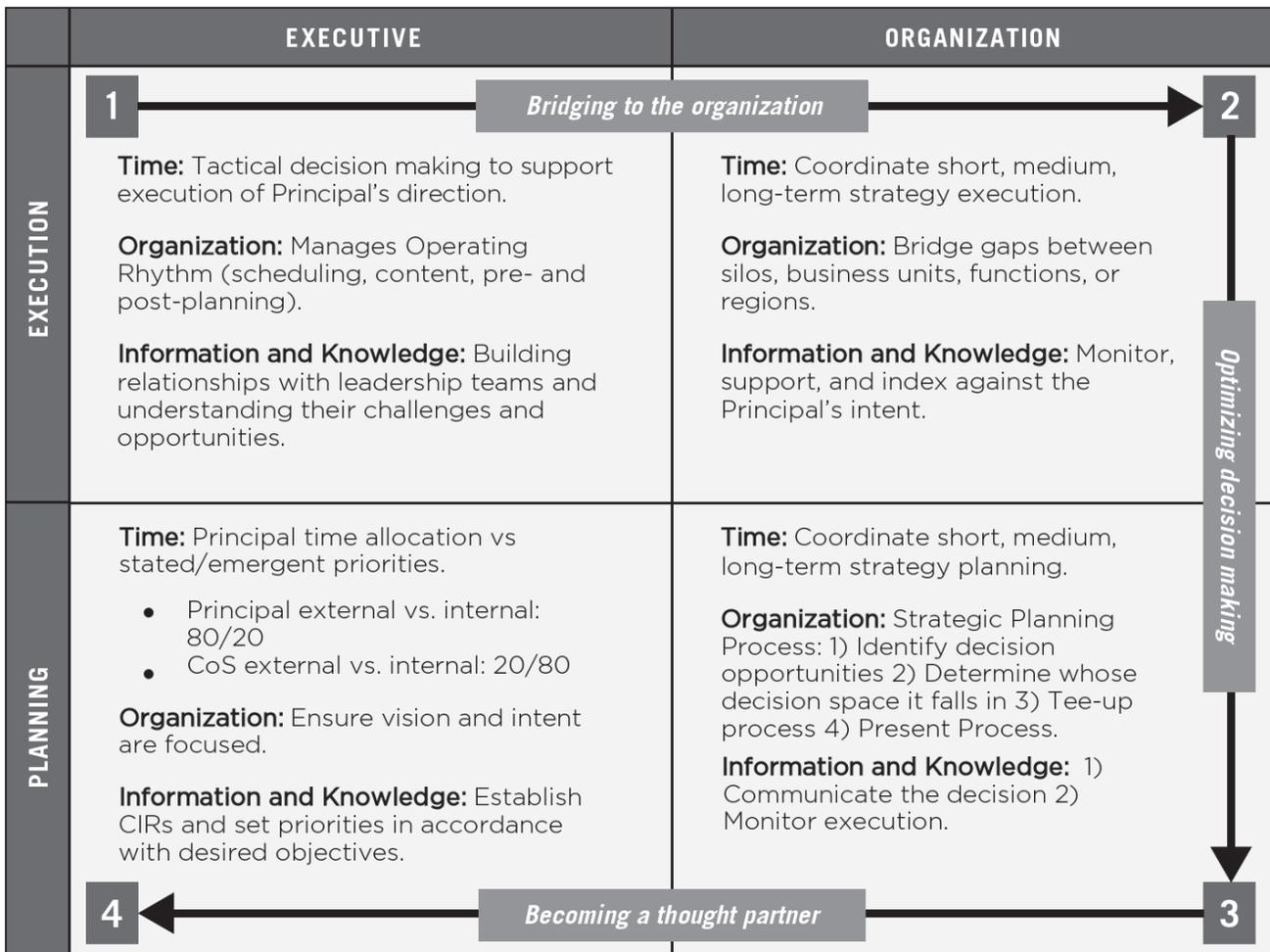
STOP	START	CONTINUE

## APPENDIX:

# Chief of Staff Model

The Chief of Staff (CoS) model is broken into four quadrants along the lines of what a CoS is expected to accomplish as he or she develops in the role to support the success of a task- saturated senior executive. You can leverage the model in the following ways:

- Both the executive and the CoS review the model and map each quadrant and subsequent line of effort to your own institutional leadership:
  - What is currently going well?
  - What is not working?
  - Where are the proverbial “blind spots”?
- Use this mapping as a starting point for a discussion and identify a plan for moving forward.
- Use the mapping as a baseline for periodic check-ins (monthly at least) to track your progress and identify where you should focus next.



Source: Fussell, C., & Goodyear, C. W. (2017). *One Mission: How Leaders Build a Team of Teams*. Penguin.

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**McChrystal Group** is your people performance partner. We help organizations leverage human potential to achieve business outcomes by applying our Team of Teams framework to three critical areas of performance: developing your leaders, implementing strategy, and measuring your organization's performance.

For more information on our services, please visit [mchrystalgroup.com](https://mchrystalgroup.com) or email [contact@mchrystalgroup.com](mailto:contact@mchrystalgroup.com)

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