McChrystal Group

Operating in Crisis:
A Leader's Guide

Get in touch.

Visit us at mcchrystalgroup.com for more information, or reach out to one of our team members below if you have any questions.

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FOREWORD

I grew up in a Special Operations community run through centralized, top-down management. Like any other organization, this style of management is dependent on a cascading series of daily, weekly, quarterly and annual meetings, the vast majority of which are face-to-face interactions. After 9/11, that face-to-face model quickly became a thing of the past.

When I took command of the United States' many-thousands-large global counterterrorism units, I knew I needed to create a paradoxical organization – both remote and highly connected, decentralized and structured, geographically separated and closely aligned. "The heartbeat of this organization," I started saying, "will be our ability to be geographically separated, and communicate as if we were in the same room." It wasn't easy – but working effectively at distance quickly became an essential part of our DNA.

We established an early guiding principle: anything and everything about how we operate was open to change. The expectation was that we would make many errors along the way, but we would not fail. We pledged to exist and thrive long after we beat the enemy.

Leaders, and our society at large, are facing a similar enemy today. The COVID-19 crisis is an amorphous enemy that will require us to evaluate how we do everything. Our mantra would eventually lead us to adjust our strategy, communications, decision-making, infrastructure, methodology, and processes – but we never lost sight of winning. The challenges ahead will be very real for leaders in business - but from experience, I know that with focus and intention, they are surmountable.

Today's leaders must adjust their thinking, and their footing, immediately. Your new norm is to adapt to remote work with little warning or planning, for an indefinite period of time. The hidden bonds that acted as a sort of glue for your team – the hallway conversations, the quarterly offsites, attending key client meetings together – have evaporated almost instantaneously, and you are left forming a new culture and way of working all in flight.

Humans are tribal in our nature. We cluster, we read body language, we draw context from contact with our teammates. There is not a simple answer here; the precise solution will be different for every organization. In the following pages you'll find a guidebook to behavioral and process changes that will kick start your effort to build and maintain a culture of trust, candor, and performance in a distributed workforce. Your mindset as a leader must shift dramatically – and it must shift today.

- Stan McChrystal

This document outlines our Leading through Crisis Framework:

SECTION 1: LEADING THROUGH CRISIS

Leaders are critical in crisis response – now more than ever, they must balance the steps needed to keep the organization viable and the team committed.

SECTION 2: ASSESS YOUR OPERATING ENVIRONMENT

Define the current reality, both internally and externally. Based on what you know (i.e., facts) and what you believe to be true (i.e., assumptions), develop a prioritized plan.

SECTION 3: ALIGN YOUR TEAM ON THE PRIORITIZED PLAN

Decide on the plan, coordinate it horizontally across your leadership team, and then cascade it vertically within your organization. Set simple rules for communication that will provide you with the feedback loops you will require to adjust your plan as the environment changes – which it will.

SECTION 4: ACT ON YOUR PLAN

Ensure communications are robust and frequent enough to empower leaders at every level, so that you are receiving regular feedback on what is working, what is not, and what has changed in your operating environment. Based on this feedback, restart the cycle and adjust your plan.

The **Assess, Align, Act** steps are repeated at a frequency that matches the rate of change in your operating environment. Every time you turn this wheel it should take less and less time to complete, since you will become capable of validating assumptions, incorporating new facts, and implementing changes faster and faster.

In addition, there are appendices that provide further details on the tactics required to sustain this operating system over the long term by a geographically remote team:

- Appendix 1 – Pressure Testing Your Plan
- Appendix 2 – Human Factors in Crisis Response
- Appendix 3 – Fusion Cells
- Appendix 4 – Role of the Chief of Staff
- Appendix 5 – Operating Rhythm Components
- Appendix 6 – Best Practices for Remote Meetings
- Appendix 7 – Decision Making and Plan Development
- Appendix 8 – Solutions Roadmap

Figure 1: *In our Leading through Crisis Framework, the outer loop represents the outcomes necessary to emerge on the other side of a crisis, and the inner loop reflects the associated fundamental actions leaders must take to lead during a crisis.*

INTRODUCTION

Crises are a natural function of all organizations in competitive industries. But when crises arise, the best-prepared organizations know that their standard practices can no longer meet the demands of the current reality. To adjust, they must effectively re-focus their efforts before rapidly moving to act.

U.S. Special Operations Forces have a philosophy, "slow is smooth and smooth is fast." Members of those teams often find themselves in situations where moving quickly is imperative. Survival depends on quick decision making and on-the-spot execution. But even in the direst of circumstances, they recognize that rushing without purpose and intent can be fatal. These same principles apply to crises, where teams and organizations need to take a deliberate approach to coordinate their actions and move in unison toward an objective to respond effectively to threats and risks. In short, "slowness" at the micro level translates into smoothness at the macro level — representing acceleration, efficiency, and overall improved performance. McChrystal developed the "Leading through Crisis Framework" based on research, best practices, and our leaders' real-world experiences successfully leading teams and organizations through crises. The **outer loop** of the above graphic represents the outcomes necessary to emerge on the other side of a crisis, and the **inner loop** reflects the associated fundamental actions leaders must take to lead during a crisis.

SECTION 1

Leading Through Crisis

The COVID-19 outbreak has ravaged communities worldwide. Amidst this crisis, organizations have been forced to adapt to radical new ways of working while dealing with widespread fear and uncertainty. Leaders are faced with highly consequential decisions as they are confronting unprecedented change and disruption. This journey will not be easy, but there are concepts and steps you can take to help.

1. COMMUNICATE WITH GREATER INTENSITY AND REGULARITY

Do not just execute your normal Outlook calendar remotely. In a time of change, the organization should hear from its leaders, in some form, multiple times per week. I recommend any text-based email you send company-wide is also accompanied with a video that transmits the same message so people can hear and see you. Open your meetings to a broader audience – context is more important than ever. In my military role, I modified my daily staff meeting into an open communication forum that lasted 90-minutes and included 7500 people, 7-days per week. Determine the pace your environment is changing – that must be the new cadence of your meetings.

2. BE INCLUSIVE

Do not just invite people by layer. Consider a daily video forum that anyone in your organization can join. In times of crisis, people will be looking to their leaders for calm and accurate information – ensure they are invited to those conversations.

3. KNOW THE LIMITS OF YOUR CRISIS RESPONSE TEAM

Every CEO I have spoken to has established some form of COVID-19 contingency planning and response team. Good. But the most important thing is not what they are doing, it is what everybody else is thinking. Allow your crisis response team to operate but spend the bulk of your time communicating to your organization at large and make sure people are focused on the priority projects and products that your customers need so they can get back in action.

4. THE CAMERA IS YOUR NEW BEST FRIEND

Steps for utilizing the value of video conferencing capabilities:

- Be real. The camera makes us act scripted. Talk to the camera as if you are talking face-to-face with real people.
- Refer to people by name, not by office or city. For instance, take the extra few seconds to say hello to Karen, wish her happy birthday, or ask her how her kids are doing. Doing this in front of thousands of other listeners is not wasting time. It is telling people you are still a family of teammates. If you do not automatically know all the names, ask your leaders at various locations to provide lists and photos – it will pay dividends to show that you care enough to know who they are.
- Be conscious of your body language in a remote setting. Swiveling around in your chair, looking at your phone, or going on and off camera repeatedly will distract the team and add to their sense of disconnect. You are on stage. Be present and aware of that fact. It is now part of your job description.
- Most importantly, create dialogue by asking powerful questions. Do not ask yes or no questions. Ask why. Ask what it means to others. Ask what they think about a new insight. Ask anything that forces longer-form answers, if nothing else, simply to build connectivity in the virtual-environment.
- Finally, ensure your team has a disciplined plan in place for regular, remote communication. This is not business as usual and flipping the switch on a particular piece of software will not cut it.

5. LEAD WITH PURPOSE

First, leaders must clearly and repeatedly articulate their company's vision, strategy, and objectives – keeping the organization oriented to your "north star." In a remote-work environment, leverage every opportunity to remind your teammates of the fundamentals of your culture, and work to do so as a real-person, not a verbatim read out of your corporate vision.

For example, a steady refrain from leaders, over remote platforms, saying, "remember team, we exist to serve our clients, and we only accomplish that by being there for our teammates," is a reminder that teammates cannot hear too often from their leaders in a time of great uncertainty.

These foundational concepts should be published in one universally accessible strategy document that can serve as a north star for front-line employees who are working at a distance. But do not just hang this on your portal and consider it done. Talk about it in every meeting to keep a remote workforce aligned. In the digital age, you can have this discussion with thousands at one time. Inclusion at scale will be critical.

6. OVER-COMMUNICATE CONFIDENCE IN YOUR TEAM

Decision-making authority should be delegated down to the lowest appropriate level. Dispersed, front-line employees understand the market conditions and customer needs at a granular, intuitive level. They have unparalleled insights on the best decisions for their local context, often better than headquarters-based executives, and they can reach the right conclusions faster. This degree of delegation requires leaders to have faith in the performance and risk-taking of the frontlines. If leaders and their teams are misaligned around risk appetites, teams and individual contributors will default to slower, safer and smaller decisions.

We are often oblivious to how the second-order effects of geographic proximity solve for some of these issues. If I am that front-line teammate, I can get clarity about my boss's intent through a quick chat in the hallway, or through the peers to my left of right. When I am remote, this becomes orders of magnitude harder. Most people hunker down and default to inaction when direction is unclear, and authorities are vague. Leaders should fight this by constantly and consistently telling their teammates, "there will be points of uncertainty as we are separated, but I trust this team. I trust you to make decisions and take action when you know the time and opportunity is right."

After your team starts making new decisions, small changes in tone and reaction by you, the leader, will have magnified impact on their future decisions. Encouragement, support and coaching will breed confidence and openness. Second-guessing and "this is how I would have done that differently" interventions will erode or eliminate any gains you have made in empowering your remote workforce. Remember, in a remote work environment, you are on stage with your organization. Be very intentional about your language and approach – the impact will be amplified.

7. RE-EVALUATE SUCCESSFUL DECISION-MAKING FRAMEWORKS AND SET DECISION BOUNDARIES WHERE POSSIBLE

Distance will change the way your people interact to make decisions. In remote environments, an instant message to ask a question might feel more disruptive than a chair-swivel in an open office floor plan. A quick call to a teammate who you have not seen in person for two-weeks sounds far more intimidating than to someone you saw at their desk an hour ago. The desire not to intrude on others, and to hesitate before asking for clarification or information, is dangerous—especially when an urgent decision arises in a dispersed organization.

Leaders must fight this. During remote-work conditions, leaders must constantly emphasize, "this is not business as usual. Leverage technology to remain connected. Reach out far more often than you normally would. You will not see your teammates in the hallway, so pick up the phone, send a quick text just to say good morning, etc. "Our culture will live on these platforms for as long as necessary, and we each play a role in this."

I recommend a very aggressive, detailed mapping of decision-space authorities in your organization. A remote, decentralized environment cannot be a linear, back-and-forth system of giving direction, acting, then waiting for the next set of orders. Instead, begin now to clearly define the decisions that each individual or team is expected to make.

In our experience, the simplest way to start this is at the top:

- Consider the decisions you hold at your level on any given day, then ask how many of those decisions you can push down one level.
- This will inform your design and implementation of the meeting cadence needed so that the next level down has access to the information required to support their decision authorities.
- Repeat this process by level, and you will find that your frontline is now far more empowered with decision authorities.

Document, publicize, and adapt decision-space authorities so there is a regular understanding of who owns what decisions. There will not be a hallway for you to sort this out.

8. ESTABLISH CLEARLY UNDERSTOOD ACCOUNTABILITY MECHANISMS

The "did you meet your numbers?" question is a banal form of accountability. A glance at a simple spreadsheet can answer it. What senior leaders should care about is whether the decisions that their teams are making are having measured and demonstrated outcomes. In remote work environments where information is often stripped of context, clear, substantive results that align with the strategy are harder to come by. For this reason, ownership and accountability is critical.

In remote work environments, work on creating a new form of accountability – one that mitigates against vague and non-contextual forms of written communication. Challenge yourself as a leader to ask building questions, not binary ones. "Why is that working so well, in your opinion?" creates far more opportunity for dialogue than does something like, "great job for hitting your numbers on that product!" The latter might feel more positive to one individual but is top-down and does little to create a culture of connected ideas.

9. BROADCAST DECISION MILESTONES: PHASE 1 VERSUS PHASE 2

So far, I have mostly addressed the culture you should create for empowerment and decision-making for routine decisions. When you face a strategic decision, the organization needs you to be much clearer, over-communicate and over-share throughout your decision-making process.

We find an easy framing tool you can use is telling your team when you are in "Phase 1" or "Phase 2". It is a simple way to help your team know what sort of input to give.

Phase 1: you are still in the information collection and analysis phase, and you are open to new options and perspectives. Every stakeholder in the decision has an obligation to bring facts and assumptions to the table.

Phase 2: you have decided and now you are transitioning to how we will execute the plan. Now it is time to support execution.

For example, when a leader suggests a solution, they can say, "I see us as still in Phase 1 on this, but it seems to make sense that we push the deadline by two weeks." That tells her team, "I need your thoughts and input. Do not let me bias the outcome."

Alternatively, and especially in a remote-work environment, a leader can say, "OK, great discussion. Based on the input, I see us in Phase 2 – we are going to push this deadline by two weeks." Here, her team is hearing a clear and declarative statement; "I am convinced, and here is the decision. When we hang up, execute against that plan."

A simple system like this will help your remote teammates know how to help, without the benefit of the normal body language cues, hallway conversations, and head-nods that we are all masters at transmitting and receiving during face-to-face work.

10. TRUST MORE THAN EVER

Simply put, trust is the glue that binds people during heightened times of crisis, and it is even more crucial amongst widely dispersed organizations. Maintaining, and even improving, the trust between teammates who have suddenly lost the ability to interact physically is challenging but possible.

This requires leaders to:

- communicate with increased intentionality – increasing the regularity and breadth of how you communicate;
- maintain a positive and prosocial voice coupled with an honest view on the situation;
- demonstrate empathy over organizational frustrations; and,
- express authentic concern for the challenges facing your organization and your individual teammates.

This degree of trust includes the assumption that remote decision-makers are not acting with bad intent when their choices seem – from a distance – unwise or uncertain.

Decisions sit at the heart of every business. In a remote-work environment, your role as a leader is more critical than ever, and a disciplined approach to cascading decision-making can be a powerful tool for you and your team.

More than anything, leaders must immediately acknowledge that things have already changed for the unforeseeable future – and start taking action now. History shows us time and again that the best leaders move before they are forced to. If you are waiting for a directive in a time of unprecedented events, you are already losing the fight. As my Navy colleagues always liked to remind their Army teammates, "you can't turn a ship that isn't moving."

It is your job as a leader to keep the ship in motion. You can adjust the plan as you go, but inertia is a bigger threat right now than a few wrong choices. In this moment of international crisis, history will remember the vanguard leaders that stepped into the arena first and took action.

SECTION 2

Assess Your Operating Environment

Define the current reality, both internally and externally. Then, based on what you know (i.e., facts) and what you believe to be true (i.e., assumptions), develop a prioritized plan.

1. EXTERNAL ENVIRONMENT

a. **Identify reliable sources:** Obtaining factual data such that you can make decisions and act accordingly is essential in crisis. This is particularly challenging in the current climate where fake news and misinformation is rapidly transmitted through social media and other outlets. To counteract these forces, you need to seek out a variety of sources:

   i. Foreign, federal, state and local government policies and/or directives
   ii. Recognized medical authorities and transportation authorities
   iii. Industry groups
   iv. Competitors
   v. Subject matter experts within your own organization
   vi. Customers
   vii. Suppliers and vendors

It's not enough to simply gather data, you must then synthesize and relate that data to your organization. Ask yourself the following questions:

- Where are we now? What has changed since our last assessment? What do we believe will happen in the near, mid and long term (i.e., our assumptions)?
- What guidance have we given to our stakeholders – customers, suppliers, employees, communities – such as work from home, work in small groups, etc.?
- Is that guidance still valid – has a change in the external environment caused us to adjust our guidance?
- Which members of the team are responsible for updating leadership on changes?
- How often are you convening leadership to Assess, Align and Act?
- What parts of the organization – by function or geography – have reduced or diminished capacity due to this guidance? What are its second order effects on other parts of the organization and stakeholders?
- Does your current technology have sufficient capacity to support the crisis response and remote work environment (e.g., devices, internet bandwidth, applications, etc.)?
- What conditions need to exist for you to ramp up/down parts of the organization that are currently diminished or at full capacity? What will be the second order effects be 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? See Appendix 1 for more information on pressure-testing your plan.

b. **Challenge your assumptions:** In crisis, emotions are heightened and timelines are compressed, making us more susceptible to biased decision making, which can lead to catastrophic results. You must make an intentional effort to proactively identify and challenge your assumptions to ensure you have a clear view of the external reality.

   i. Listen to differing views. Do not automatically dismiss differing perspectives, even if they are at odds to your own. Make sure you can logically articulate WHY you disagree.

   ii. Expand your circle. Communicate with leaders outside of your own organization or field, have conversations with people who do not hold the same beliefs as you, and read news from respected sources that are at odds with your normal media diet.

   iii. Try perspective taking. Perspective taking is the process of changing your frame by envisioning an issue from another's viewpoint. Try to argue from the other side – can you think of any valid reasons why someone might disagree with your belief?

c. **Leverage collective wisdom:** It is tempting for leaders to adopt a more directive role in crisis, often making decisions alone or with a few trusted colleagues. This can create a very myopic and distorted view of reality as leaders create an echo chamber that artificially reinforces their conclusions. It is essential that leaders allow more people into those conversations so they can hear different perspectives. However, simply inviting others to participate is often not enough. Leaders need to create the conditions to encourage others to speak their mind.

   i. Model truth telling. Explicitly articulate the limitations of your understanding and encourage them to do the same.

   ii. Encourage voicing up. Ask people for input before sharing your own and do so by name, starting with the most junior people on the team. Otherwise junior staff will unintentionally adjust their messages to coincide with the senior staff.

   iii. Challenge opinions. Question definitive statements not backed up by data explicitly, in order to avoid bias and subjectivity.

   iv. Don't shoot the messenger. Respond to bad or good news with appreciation all the same. Otherwise messengers will withhold information from you out of a fear they will professionally suffer.

2. INTERNAL ENVIRONMENT

a. **Leverage network influencers:** Every team and organization have a subset of individuals that have a disproportionate amount of influence and connectivity. They are often informal leaders that shape the culture and the information that is transmitted. These network influencers are the key to getting a pulse on your people and the state of the organization.

   i. Think 360 degrees. Can you identify a good source of information above you? Across different functions? Among your peers? Among the people below you?

   ii. Survey your team. Ask a variety of people the simple question, "Who do you go to for help?" Inevitably a few names will begin to standout of the crowd. Those are likely your network influencers that can be leveraged in crisis.

b. **Identify the needs:** During crisis, people naturally shift into a "fight or flight" mode of operation, focusing on risks and preserving themselves. If these risks are not addressed, your people will fixate on them and will have a difficult time being productive. Often all they need is someone to listen for them to process their feelings, identify a path forward and move beyond the stress response to being part of the solution.

   i. Listen. Are you actively listening? Do you monitor how often you speak compared to everyone else?

   ii. Create a safe space. Do your people feel safe enough to directly and publicly disagree with you?

   iii. Step back from emotion. What tactics do you use to step back from your own and others' feelings to analyze them in a more objective manner?

See Appendix 2 for more information on human factors in crisis response.

c. **Assemble your task force:** You need to create a small cross functional team to conduct planning and make recommendations in response to changes brought on by the crisis. It is critical that you identify the right people and give them the proper authority and guidelines to act quickly and decisively. See Appendix 3 for additional ideas on how to assemble this group, called a Fusion Cell.

   i. Who's on the team? Consider assembling a cast of multidisciplinary individuals with varying skills who possess the knowledge and expertise necessary to accomplish the task.

   ii. What will they accomplish? Articulate the common purpose and specific objectives that need to be met.

   iii. Who will do what? Identify clear roles and responsibilities to reduce/eliminate redundancy, increase efficiency, and ensure accountability.

   iv. How will they do it? Define the task force's strategy in relation to activities for execution, meaning the tasks serve your overall strategy.

   v. When will they meet? If it's not scheduled, then it's not a priority.

d. **Take a hard look at your current capability:** Crisis creates accelerated timelines, increased risk, resource limitations and coordination challenges. You cannot simply conduct business as usual. Instead, you need to take a hard look at the feasibility of your current processes and systems as you make decisions to respond to the changing situation. Ask yourself these questions:

   i. Reality check. Where are we now? What has changed since our last assessment? What do we believe will happen in the near, mid and long term (assumptions)?

   ii. Organizational impact. What parts of the organization – by function or geography – have reduced or diminished capacity due to this guidance? What are its second order effects on other parts of the organization and stakeholders?

   iii. Technology audit. Does your current technology have sufficient capacity to support the crisis response and remote work environment (e.g., devices, internet bandwidth, applications, etc.)?

   iv. Forecasting assumptions. What conditions need to exist for you to ramp up/down parts of the organization that are currently diminished or at full capacity? What will be the second order effect on other parts of the organization?

   v. External factors. What changes in the external environment represent threats or opportunities?

   vi. Contingency plan. Does the team have a contingency plan if the situation gets worse, or better? See Appendix 1 for more information on pressuring testing your plan.

e. **Utilize your Chief of Staff:** The Chief of Staff role is critical to managing information, decisions and communications as the leadership quickly cycles through the Leading through Crisis Framework repeatedly with increasing speed. If trust is the glue that binds your organization, the Chief of Staff is the duct tape that keeps it from coming apart at the seams. At the core of the Chief of Staff role are two fundamental objectives:

   i. increase the leader's and organization's ability to execute with efficiency, and

   ii. increase speed and precision of decision making and execution at the leadership and operational levels of the organization.

See Appendix 4 for our Chief of Staff framework.

SECTION 3

Align Your Team on the Prioritized Plan

Decide on the plan, coordinate it horizontally across your leadership team, and then cascade it vertically within your organization. Set simple rules for communication that will provide you with the feedback loops you will require to adjust your plan as the environment changes – which it will. Be clear that additional change is imminent. **To determine your priorities, ask yourself:**

1. Do you have a good understanding of the current reality?
2. Is your message factual?
3. Is your message simple and clear?
4. Can you leverage graphics or diagrams to illustrate your point and make it memorable?
5. Have we incorporated credible updates from reliable sources?
6. Does it include what is happening and what the organization is doing to address it?
7. Does it provide actionable guidance and include the information people need?
8. Are you expressing concern, empathy, and compassion?
9. What are people feeling? What emotions need to be considered?
10. Have you identified and disseminated critical information requirements (CIRs) to your organization (i.e., if X happens, inform Y within Z-hours)?
11. Have you delegated authority to adjust actions if the facts on the ground do not match your direction?

SECTION 4

Act on Your Plan

Ensure the communications is robust and frequent enough, and your leaders at each level are empowered, so that you are receiving regular feedback on what is working, what is not, and what has changed in your operating environment.

Communicate at least three times as frequently as during your normal operating rhythm.

1. Have you determined and communicated the new frequency for recurring meetings during the crisis period?
2. Have you revisited and revised agendas for all recurring meetings to ensure that only relevant information is addressed?
3. Do you leverage three channels (email, video, messenger, etc.) to push out major information?
4. Have you built standard meeting kick-off and sign-off points to quickly align the team?
5. Have you engaged stakeholders from a range of backgrounds?
6. Are you easily accessible?
7. Are you sensitive to the non-verbal messages you are communicating?
8. Are you sharing your own stories of vulnerability, learning and growth?
9. Whose ideas/comments are you encouraging and praising?
10. Are you open and honest about the organization's capabilities, needs and problems?

See Appendix 5 for more information on operating rhythm components.

In addition to having the right technical capabilities, conducting remote communications requires excellence in both behaviors in and structure of the communications.

1. **Behaviors.** Set expectations and simple rules for participants on the behaviors needed to increase the effectiveness of remote operations.
2. **Structure.** Set the agenda and/or meeting structure that provide operational clarity for remote forums and operations.

See Appendix 6 for more information on best practices for remote meetings.

Have you communicated changes effectively?

1. How are you monitoring execution of these actions and reporting efficacy back to leadership and to the organization at large?
2. Have you met the criteria to implement one of your contingency plans?
3. Which changes should remain in place post-crisis, and which changes should revert to pre-crisis?
4. Have you established feedback loops in our cadence that allow us to assess efficacy of your plan? Do these feedback loops include innovations or lessons learned?

External Communications:

1. What are your communications objectives, channels and cadence for communicating to:
    - Foreign, Federal, State, and local government policies/directives;
    - Regulatory authorities;
    - Industry groups;
    - Customers;
    - Suppliers/Vendors;
    - Communities?
2. Have you established feedback loops in your cadence that allow you to assess the effectiveness of your communications?
3. Who will approve themes and messages?
4. Are your internal and external communications aligned?

Have you created the right teams to ensure cross-functional communication and execution?

See Appendix 3 for more information on Fusion Cells.

CONCLUSION

What you find outlined above, and will find in more detail in the appendices, may seem obvious – in fact, that is the point. Operating in crisis is challenging not because you need to develop new and complex processes, but rather because your success will be determined by your ability to commit to the basics with supreme discipline and calibrated to the right speed. What we outline here should feel intuitive, but I know from both the battlefield and corporate crises that employing intuition in high-stress environments becomes harder and harder. Give yourself every advantage possible, including quick reference tools and guides contained here written by people who wished they had them when they led in harm's way.

APPENDIX 1

Pressure Testing Your Plan

ABOUT RED TEAMING

Red teaming is a structured process that is semi-independent from an institution, which attempts to better understand that institution's interests, intentions and capabilities—or those of a competitor or clients. The fundamental need for red teaming is based upon the truth that leaders—and their planning teams—cannot grade their homework. Those who develop or approve a plan cannot identify all the risks, vulnerabilities or opportunities that exist within that plan.

The typical planning process starts with a group of people who have developed comparable views, norms and assumptions—thus, the groupthink start point. They then follow a routinized, formulaic process that produces a plan that narrowly hews to the groupthink of the planners—the expected output (Figure 2). Facilitated red teaming exercises overcome the restrictions of groupthink and hierarchy to open the aperture for divergent ideas and thought. After uncovering otherwise-hidden risks and opportunities, the exercises then converge toward a more resilient and refined plan.

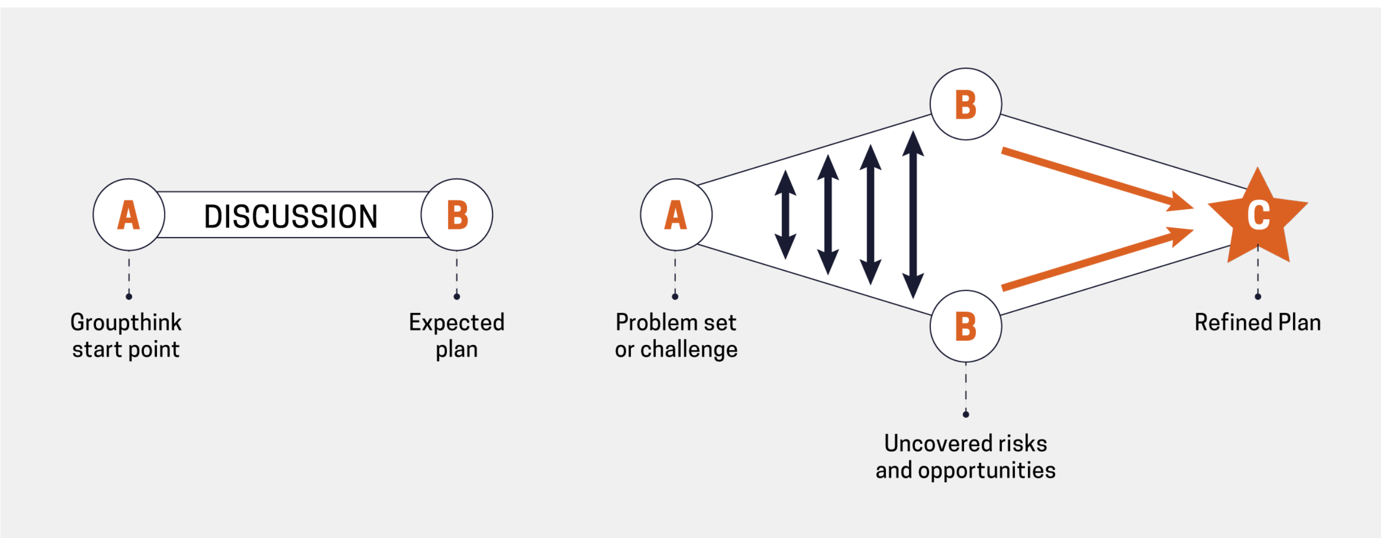


Figure 2

At McChrystal, we have adapted red team exercises from the field and created new exercises as well. To learn more about the red team exercises published by the University of Foreign Military and Cultural Studies, explore the U.S. military's Liberating Structures Handbook.

CRISIS RED TEAMING

In the best-case scenario, red teaming occurs far in advance of a hypothetical "what if?" However, in times of crisis, the red teaming approach to pressure test plans must shift to a "what now?" lens. At the same time, crisis red teaming can be far more critical, and especially when – in an effort to exert some sense of control – planning becomes tactical and incremental. In times of crisis, leaders need "outside the box" thinking to validate strategies and plans. **Here are our five best practices for implementing facilitated crisis red teaming exercises:**

1 ASSEMBLE THE RED TEAM

- Virtual or in-person
- Combine "core team" (individuals with the technical expertise and familiarity with the specific problem set) and and "cold eyes" (smart outsiders who can provide alternative perspectives, but have no direct vested interest in the outcomes)
- Survey the team to understand culture and interpersonal dynamics

2 DEFINE THE CURRENT PROBLEM SET

- Clearly identify, then articulate, the purpose of the crisis red teaming exercises
- Use ranked prioritization, categorization, group brainstorming, anonymied voting to facilitate red team exercises

3 ENVISION THE SHORT-TERM FIRST

- Select a date to envision in the future
- Immerse team in known "truths" about that date in the short-term and their individual lives at that date
- Allow individauls to assess random peices of information about the short term date
- Create an aggregted forecast for the week ahead

4 CONSIDER EMPLOYEE WELLNESS

- Check-in with team individually
- Explore organization-specific interventions to reduce sense of personal anciety and promote wellbeing
- Speak candidly and personally to the challenges faced

5 STAY ACTION-ORIENTED

- Focus on"must dos" that can be integrated into a practical, near-term action plan.
- Be honest with what plans and initiatives their organization has agency to implement soon
- Assign roles and responsibilities and deadlines
- Capture a clear aligning message that will be shared with the wider organization

FOSTERING RED TEAM THINKING

Beyond pressure testing specific plans or processes during crisis, leaders should seek to cultivate critical and divergent thinking within their organization more generally. A workforce that is more capable of thinking "outside the box," will be more adaptable to the new and unexpected circumstances that are manifest during crisis. The following section outlines ten ways to foster red team thinking within individuals, teams, and organizations.

1. RECOGNIZE AND MITIGATE AGAINST YOUR BIASES

Review the common biases and develop personal strategies to mitigate against each. Red teaming and the information provided in this guide will aid you as you continue to increase you understanding of your individual biases and organizational pathologies.

Halo effect – The tendency for an impression created in one area to influence the opinion in another area.

Status quo bias - An emotion bias where one believes the current state of affairs is "correct" and effective.

Blind spot bias - The tendency to recognize the impact of biases on the judgment of others, while failing to see the impact of biases on one's own judgment.

Anchoring - The tendency to rely too heavily on an initial piece of information (the "anchor) when making decisions and judgments.

Confirmation bias - The tendency to interpret new evidence as a confirmation of one's existing beliefs or theories.

Examples of organizational pathologies include:

Groupthink - The collective and illusion of unanimity enforced by bosses, mind guards and the "Highest Paid Person in the Office" (HIPPO). As a result, individuals adopt their coworkers' preferences and become captured by institutional culture

Hierarchy – A division of ranks within an organization that senior leaders typically assume to not exist. With this bias, individuals are likely to believe their doors are always open, that their organization is "horizontal," and that "if there's a problem, I'd know."

2. READ AND LISTEN OUTSIDE YOUR INTERESTS OR EXPERTISE

Here are a few recommended sources of reading materials:

- **Our World in Data** – Long-run global trends.
- **Society for Judgement and Decision Making** – Rigorous readable journal.
- **Science Daily** – Curated summaries of breaking scientific discoveries.
- **World Economic Forum** – Authoritative source of economic trends.
- **World Health Organization** – Authoritative source of human progress trends.
- **Stanford Encyclopedia of Philosophical Ideas** – Expert-curated summaries of philosophical ideas.
- **Wikiquote** – Memorable quotes from history.
- **Project Gutenberg** – Excellent source of literary classics.

3. VOICE UP AND RECEIVE VOICE

Voicing up is an essential team behavior required to overcome the constraints of hierarchy and groupthink in organizations. It is about expressing ideas—problems, concerns, solutions—to a leader who can do something with those ideas. Certain considerations must be made to that ensure voicing up is done as productively as possible.

Voice Up...

- New ideas or problems in a way that is aligned with organizational values and goals
- In a way that is affirmative and encouraging
- Directly to the most relevant leader who is in control of the corresponding resources or decisionmaking
- In a way that flatters the impacted senior leader, or enhances that senior leader in their area of responsibility

In a way that takes into account the resources, timelines, and stakeholders involved in the issues that you are voicing up about

How to Receive Voicing Up

ACKNOWLEDGE the junior member's contributions.

PUBLICLY DO SOMETHING with the idea or problem that was voiced up to you – establish that it is encouraged and productive.

SET THE TONE that the junior member's communication matters despite their relative lower position of power.

RECOGNIZE THE CONTRIBUTION OF JUNIOR MEMBERS, who have a valuable unique perspective on the organization. For example, in a group setting where an individual has shared feedback:

- Thank the person providing feedback, presenting information, or raising a question, even if you don't like it or agree with it (it takes courage to have a tough conversation and demonstrates they care about you/your development if they are willing to do it).
- Summarize what the person has shared to ensure the message intended was the message received.
- Recognize why and how the information they have shared or question they have raised is important.

4. CREATE ADJACENCIES

ENCOURAGE INCIDENTAL CONCEPT CRYSTALLIZATION

Incidental concept crystallization is the phenomenon whereby discoveries and insights are gained, by chance, during general conversations around a problem.

CREATE MOMENTS OF TRANSITION

Walking, rather than sitting, and other examples of transitions can improve the mental connections made between divergent thoughts, and thus improve the outcomes of red teaming.

INITIATE OUTSIDER CONVERSATIONS

Brainstorm with people outside of your team. Connect with individuals from disparate functions.

ESCAPE NORMAL PHYSICAL SPACES

Individuals seated outside of 5x5 cardboard boxes perform better on creativity tests than when seated inside *(Leung, A. "To "Think Outside the Box", Think Outside the Box," Association for Psychological Science)*. Acting out metaphors increases convergent thinking – an important component of creativity.

INCUBATE AND SELECTIVELY FORGET

Incubation is the process of nurturing in a purposeful environment for growth. Unconscious processes contribute to creative thinking. After conscious preparation, but before "illumination," incubation is an important stage for creative processes. Selective forgetting is the psychological process of allowing memories to take free form; it is also important for allowing free-forming ideation.

5. REWARD DIVERGENT THINKING

You can incentivize divergent thinking within teams with actions as small as gift cards to robust evaluation processes for team members that account for demonstrated creativity. After all, it is difficult to set expectations that are not structurally rewarded.

6. SET THE RIGHT GROUP SIZE

In order to amplify out-of-the-box thinking in teams, the team composition must be set up to harness that creative thinking. Studies have shown that large teams are more innovative thank smaller teams because they have greater knowledge and diversity of roles. This benefit of larger teams is facilitated in prosocial climate where team members help one another and share information. However, too large of a team requires more coordination effort which can detract from group ideation.

7. ENSURE ADEQUATE LEADER SIGNALING

In order for team members to feel safe and comfortable raising new ideas during red team exercises, the senior leader must signal to the team that they are bought into the red teaming and that they are willing to hear bad news and act on it. This needs to be communicated and signaled to participants, either in a public communication or other gesture.

8. USE PRIMING

Priming, a technique that uses exposure to a stimulus to influence a separate response, can be used to both bolster and stifle red team thinking. By believing that their ability to be innovative and divergent was not set at birth and is rather malleable, and that they can be a hyper-critical thinker, individuals can be better red teamers. A general application for priming is simply to surround teams with examples of creativity and other outside the box thinking.

9. ASSEMBLE DIVERSE TEAMS

Another measure for creativity is the diversity of the team. Countless studies have found the teams with members from different cultures and disciplines increase creativity by preventing group think. This is due to the adjacencies of perspective, knowledge, skills, and abilities created. Assembling a diverse team is important foremost in recruiting practices, and down the line when it is time to assemble a diverse team for red team exercises. When assembling participant groups, consider diversity in background, tenure, seniority, skills, abilities, and relationships, among other factors.

10. NORMALIZE FAILURE

"Failure" occurs when the result does not match the expected outcome. It is not pejorative. To normalize failure, individuals must erase it of negative connotations. One way facilitators can achieve this is by delivering feedback effectively. This means you…

- Acknowledge contributions.
- Summarize what the person has shared to ensure the idea intended was the idea received.
- Set the tone that the contributor's ideas matter.
- Publicly recognize the contribution of junior members, who have a valuable unique perspective on the organization.

APPENDIX 2

Human Factors in Crisis Response

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?		
• Close the information gap • Level set on priorities repeatedly everyday – overcommunicate the priorities • Translate your principal's intent and vision • Keep expectations in check • Resource the priorities and de-resource everything else • Keep your principal healthy: get ahead of CIR	• Create a decision forum (driven by crisis response team – productive conflict, diversity of thought) • Help the principal to identify the people-pleasing triggers to develop strategies and disrupt the pattern – CoS plays bad cop • Implement daily comms plan from principal to entire organizational priorities, decisions, actions • Keep your principal healthy: keep the principal emotionally connected	• Create a decision forum (involve SME, provide relevant data, COAs, highlight risks and mitigation plans) • Carve out time to think strategically – get out of fire fighting and think long term • Identify SME that the principal trusts and be sure they are on the crisis response team • Keep your principal healthy: Synthesize datadown to CIRs

Personal Action Plan

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 during 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 3

Fusion Cells

A Fusion Cell is a collaborative, cross-functional team intended to rapidly interpret and distribute information and coordinate activity across the organizations. By combining personnel, resources and information from multiple pieces of the organization (and even multiple organizations), the Fusion Cell can achieve far more than its individual members would be able to accomplish alone.

The following are essential to ensure that the benefits of a Fusion Cell are realized:

Make Information-Sharing the Priority:

The core concept of the Fusion Cell is to 'fuse' information. This requires complete sharing of all information and an honest exchange about each department's perspective. The reticence of even a single member can reduce the effectiveness of a Fusion Cell. It should be made clear immediately upon the Fusion Cell's creation that full and transparent sharing of information should be the norm.

Reticence is often caused when team members mistakenly believe that they have to go back to their departments to ask for clarity or permission to share information. Every member of the Fusion Cell must feel fully empowered to speak on behalf of their department.

Make Yourself Accessible:

Fusion Cell members need to know that the innovative plans being produced are reaching key decision-makers. The purpose of a Fusion Cell is to make the organization faster and more responsive in a time of crisis; this can only be achieved if members are able to circumvent the typical layers that exist in a company hierarchy and have direct access to leadership.

Choose the Right People:

If you are not sending your best personnel to work in the Fusion Cell, it will not succeed. You need individuals who can speak on behalf of their department in a sufficiently timely manner and will manage the cross-departmental relationship. If the Fusion Cell is to fulfil its purpose of bringing together viewpoints and innovations from across the organization—and then drive fast-paced, focused activity—it must be made up of your most experienced, well-informed and well-connected personnel.

Define Success:

Fusion Cell members need to know their mission. It is critical that company leadership understands what they expect of the Fusion Cell and clearly relay those expectations to the Fusion Cell leadership. The Fusion Cell leadership, in turn, then makes it clear to every member of the Fusion Cell what his or her role is in supporting the Fusion Cell's mission. Without clear guidance on goals and expectations, the Fusion Cell will be unable to determine whether or not they are succeeding, and therefore whether or not they need to innovate or double-down on current activities.

APPENDIX 4

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:

1. 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"?
2. Use this mapping as a starting point for a discussion and identify a plan for moving forward.
3. Use the mapping as a baseline for periodic check-ins (monthly at least) to track your progress and identify where you should focus next.

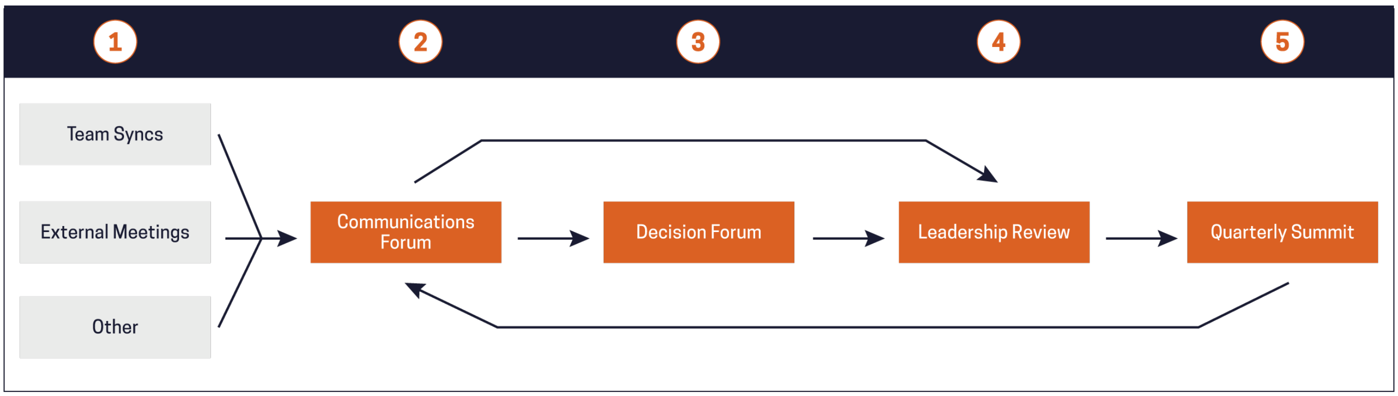
	EXECUTIVE	ORGANIZATION
EXECUTION	1 — *Bridging to the organization* → **Time:** Tactical decision making to support execution of Principal's direction. **Organization:** Manages Operating Rhythm (scheduling, content, pre- and post-planning). **Information and Knowledge:** Building relationships with leadership teams and understanding their challenges and opportunities.	2 **Time:** Coordinate short, medium, long-term strategy execution. **Organization:** Bridge gaps between silos, business units, functions, or regions. **Information and Knowledge:** Monitor, support, and index against the Principal's intent. ↓ *Optimizing decision making*
PLANNING	**Time:** Principal time allocation vs stated/emergent priorities. • Principal external vs. internal: 80/20 • CoS external vs. internal: 20/80 **Organization:** Ensure vision and intent are focused. **Information and Knowledge:** Establish CIRs and set priorities in accordance with desired objectives. 4 ← *Becoming a thought partner* —	**Time:** Coordinate short, medium, long-term strategy planning. **Organization:** Strategic Planning Process: 1) Identify decision opportunities 2) Determine whose decision space it falls in 3) Tee-up process 4) Present Process. **Information and Knowledge:** 1) Communicate the decision 2) Monitor execution. 3

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

APPENDIX 5

Operating Rhythm Components

Your operating rhythm is the disciplined cadence of activities that drives individuals and teams towards their strategic priorities. Keeping activities aligned with priorities requires a cadence designed to create mutually supporting feedback loops and operate at the speed of your environment.



1. **Communications Forum:** updates on the external and internal environments
    - **Purpose:** Exchange information on changes in the operating environment, create feedback loops on efficacy of plan execution, articulate decisions made by leadership (and the "why" behind them), build the situational awareness that powers execution in context.
    - **Occurrence:** High frequency.
    - **Inputs:** Organizational priorities; progress, challenges, and risks in execution; market and environmental data; leadership messages; "hot topics"; functional updates.
    - **Outputs:** Progress on operational execution (key tracking metrics), decisions that need to be made.
    - **Attendance:** All stakeholders to executing on goals and priorities.

2. **Decision Forum:**
    - **Purpose:** bring together stakeholders in a given decision to analyze and provide inputs to the decision maker as he/she conducts analysis of the available options available (Phase 1), and then to provide their support to execution (Phase 2) once the decision is made.
    - **Inputs:** Stakeholder expertise and information.
    - **Outputs:** Decisions and cross-functional commitment to execute on them.
    - **Occurrence:** Driven by the number of decisions to be made.
    - **Attendance:** Decisionmaker, stakeholders in the decision to be made (this will vary by decision).
    - Attendees at the meeting (except for the decision maker) will vary based on the whether or not they are stakeholders in the decision.

3. Leadership Review:

- **Purpose:** Adjust strategy and execution.
- **Inputs:** Communications forum can identify strategies that are not working, or if gaps emerge between strategy and execution.
- **Outputs:** Changes to strategy and execution to be vetted and aligned in the Quarterly Summit
- **Occurrence:** Low frequency, as needed.
- **Attendance:** Senior leadership team and relevant functional experts.

4. Quarterly Summit:

- **Purpose:** Evaluate the alignment of resources against strategic goals, and the progress of operational execution against those goals.
- **Inputs:** Decisions and concerns.
- **Outputs:** Adjustments to goals highlighted in the Communications Forum, metrics tracked, and agenda items discussed.
- **Occurrence:** Quarterly.
- **Attendance:** Senior leadership team and relevant functional experts.

5. Daily Stand Up (Not listed in diagram):

- **Purpose:** Align team on priorities and current issues.
- **Inputs:** Leader states their current priorities and current issues. Team members state their current priorities and issues/impediments.
- **Outputs:** Alignment of team on work to be done, priorities, and guidance for issue resolution.
- **Occurrence:** Daily 15-30 minutes.
- **Attendance:** All Team Members.

APPENDIX 6

Best Practices for Remote Meetings

1. START NOW

This will take more time than you'd like. Connecting people, even into the thousands, is just a flip of the switch with today's technology. But productive connection that drives effective action is a bigger challenge. If you run a town-hall every quarter and teammates dial-in from around the world, don't assume you're prepared for true remote-work status. Large, top-down forums like most town-halls (even when leveraging remote- connectivity systems) are designed for transmission, not for real dialogue and emergence of insights.

2. ANALYZE YOUR IT TOOLS - AND HOME KITS:

You will need a proper IT backbone in place for remote work at scale, so do a quick analysis here. Most large organizations we work with have these systems at their fingertips (though most are underutilized), while some smaller organizations might not have the needed software in place. But there are countless tools that are very accessible and cost effective for remote communication. At McChrystal, we leverage the Microsoft 365 stack for project work, knowledge management, scheduling, and remote communication (both video and text) through the Teams platform. But smaller organizations can quickly assess what they have in place and find a range of products that are affordable and effective. Don't assume your people have what they need at home. Ask your managers to run a quick survey of home-level readiness of your employees. Do your people have sufficient home bandwidth to support video communication? Are your remote security protocols updated? Are your people familiar and comfortable with this model?

3. PRACTICE!

Start running meetings that would normally be face-to-face through a remote platform to work out the bugs. You can do this from inside the same building - just separate yourselves and see if the systems are up and running. Ensure you're assessing both your video/audio capabilities, and your real-time chat platforms.

4. MAP YOUR OPERATING RHYTHM (see Appendix 5)

Our time in a traditional office space is filled with scheduled meetings, ad hoc meetings, and chance encounters throughout the day. It's easy to underestimate how much productivity comes from those sidebar discussions, quick gatherings in someone's office or a chat around the lunch table. Start now looking at the operating rhythm of your organization.

5. BIG TO SMALL

As you consider the right mix of standing, remote meetings - start big and work your way down. People in your organization will want a place to go for a single picture of the organization, market, etc. from their leaders but also a forum where they can share what they're seeing and hearing on the ground. As a thought experiment, imagine the several hundred folks (or more) that you might pull into your quarterly town-hall. What if you started and finished each work week, during purely remote conditions, with all of those team members dialed into a single communication forum? Your remote employees would know, at a minimum, that every three to four days they would hear from their leadership, connect with peers across the enterprise, and have a forum to share ground level insights or clarify key issues.

Once the senior-most level of your organization establishes the operating rhythm with which it will communicate broadly with the company, leaders one level down can decide where and how they'll build the necessary supporting communications forums with their teams and external partners. This methodology can cascade quickly down to front-line managers and operators, and a natural operating rhythm will start to emerge.

But don't just map your existing outlook calendar into an operating rhythm. Your calendar is likely more dependent on the "meeting after the meeting" than you'd assume, and those physical encounters will disappear in a remote situation.

By starting with high inclusivity at the very top, combined with leaders who are sharing real insights and encouraging dialogue from the bottom up, you'll be amazed at how much useful information will be available quickly to large numbers in your organization. The more aggressive senior leaders are willing to be with inclusion and transparency, the more you can avoid meeting after meeting down into the organization.

6. CREATE AGENDAS

This sounds painfully obvious but structured agendas are more important than ever in a remote environment. McChrystal's suggestion is to write your agenda in excel-format. From left to right, the key columns should be time (minute by minute), topic, briefer (to include title and contact information), and links to key read-ahead materials. In that way, your agenda is doubling as a knowledge management tool for future reference.

Hang these agendas in the calendar invites – something that is easy to overlook and underestimate. This gives your teammates another knowledge management tool – and ability to look forward and backwards at topics discussed over time.

Do a quick review after each meeting on the effectiveness of the agenda. As dynamic as most businesses must be these days, if your agenda isn't in a state of constant improvement, you're probably falling behind in some way.

TIME	DESCRIPTION	LINKS
8:00AM - 8:50AM	**Frame the Conversation** Welcoming the Team and outlining the goals of the meeting. McChrystal Group will provide an overview and set expectations. *Led By: Barry S., Stan M., Chris F.*	• Pre-read for discussion
8:50AM - 9:00AM	**Updates and Priorities** Review current priorities and provide updates on the current situation at hand. *Led By: Jeff B.*	• Best practices

Figure 3: *Sample agenda*

7. ESTABLISH CONTROLLERS

In a remote meeting, you need a single person who is responsible for keeping the group on track. This should not be the person overseeing the meeting, but a support position that introduces the intent of the meeting, keeps it on time and leads by gently steering teammates when things are running over time or getting off heading, and who captures the key points of each topic/discussion.

The controller should quickly clean up the meeting notes, capture any due-outs, and distribute meeting notes broadly to all in attendance. This is yet another knowledge management tool, and the due-out list (where applicable) should be the first thing you start with during the next iteration of that forum. As opposed to a face-to-face environment, where folks are constantly bumping into one another and getting quick updates on project and deal status, a remote system requires great discipline to maintain awareness and accountability. A forum-controller can quickly fill this void.

This is a very high-level starting point, but we hope it will serve as a baseline for how you can start to structure and execute these types of remote forums.

8. USE VIDEO

It requires more bandwidth but the personal connection of seeing a teammate's face far exceeds what a conference call alone can provide. Any good collaboration platform (at McChrystal, we leverage Microsoft Teams) will provide video connectivity that can put people "face-to-face" all the way down to smartphones over existing wireless networks. If your organization doesn't use the video feature today, start practicing now. When bandwidth is constrained, the leader should maintain a video connection even if the other attendees cannot. This allows you to project calm and focus, as well as encouraging people to stay fully engaged in a remote meeting.

9. USE CHAT

We recommend a video platform that will allow chat rooms to run in parallel. Use the chat room attached to the meeting for questions or comments to the group to be posted without constant interruption and confusion. Chat is also a great channel for point-to-point communications around a meeting topic, and general comments that are not time sensitive.

10. HAVE A STANDARD, SCRIPTED KICKOFF FOR VIRTUAL MEETINGS

In an office environment, we stroll into meetings, catch the small talk in the hallway, and naturally orient ourselves to the meeting and the people around us. In a remote environment, we're abruptly connected. Be aware of this difference and have a standard opening script. Welcome your team, make it personal and orient them to the meeting's intent. We've all sat through countless painful conference calls where the first five minutes is people talking over each other until someone takes control. The owner of a remote meeting might start with:

"Good afternoon, everyone, and thanks for joining. This is Mary Smith, Vice President for Supply Chain. I hope your week is off to a great start! It's 2pm Eastern Time on Tuesday, March 17th, and this is the weekly regional resourcing sync. I run this meeting at this time every week, and the intent is to talk through any resourcing issues from the past seven days and forecast requirements for the next seven days. It's great to see that we have over 200-folks dialed in today! For those of you joining us for the first time, you should see our agenda on your screen, but if it's not coming through, you'll also find it attached in the calendar invite in your outlook. I'm running this meeting from my home office in St. Louis, and I see that we have folks dialed in from six time zones around the world! We'll capture and send out detailed minutes at the end of this 60-minute meeting. If you have tactical questions throughout this meeting, please use the chat room, which I've asked Peter Jones, my deputy here in St. Louis, to monitor throughout the meeting. With that, let's turn to our first region update…"

In less than a minute, you can quickly align hundreds of teammates around the world. Connect with them, orient them to where they are in virtual meeting space, underscore the intent, and set the parameters through agenda and time allocation. But remember, you'll have new folks joining almost every time in a large and complex organization. Using the standard introduction every meeting will feel repetitive, but your remote employee who can't rely on hallway conversations will appreciate the connection and feel like they're part of the team.

11. OFFER GUIDANCE ON SOUND DISCIPLINE

We've all dealt with the conference call when you can't hear Bob because his Bluetooth is crackly or Sarah because she's boarding a flight. In normal circumstances, we can live with this. But if large-scale, remote work is the new norm, it is everyone's responsibility to be as clear and crisp as possible—out of respect to others in the meeting and in service to the mission, as possible. We recommend that you establish some standing norms, distribute them and highlight them regularly.

- Join remote forums from a quiet area out of respect to others on the line.
- Introduce yourself with name, title and location if you ask a question or offer a comment.
- Speak at 75% speed and over-articulate your words.
- Ensure your microphone is well positioned. Headsets are better than laptop speakers.
- If you're speaking for the first time, ask for a quick sound check (from a specific person! Don't ask 200-people, "can you hear me ok?")
- When you're not speaking – go on mute.
- Turn on your video - it's important that we can see each other while we're remote.
- Most importantly – assume positive intent. There are challenges with large scale remote collaboration, but we'll figure it out as a team!

12. CALL PEOPLE BY NAME

Don't say, "ok, over to the New York office," but instead, "OK, over to Laura and Mike, our co-heads in New York. Great to see you both, and thanks for dialing in. Really appreciate what you're doing to keep our 50 teammates there tied in, and thanks for the report you posted yesterday. Laura, we'll start with you."

It takes 30 additional seconds, but a little touch from you as a leader can overcome some of the challenges of remotely connecting your team.

13. LET THE MEETING CONTROLLER CONTROL

We discussed the importance of a controller who introduces briefers, takes meeting notes, keeps the agenda on heading, and monitors the general chat room for key issues or questions to highlight. The controller isn't the executive hosting the meeting – he or she is the chief of staff, director of operations or director of finance who knows the whole organization well and can free up the executive to think and ask questions. Allow this person to do their job. If a topic is running over, the controller can gently nudge, "team, we're a few minutes over on this topic. I'd recommend that Ted and Laura have a side-bar call afterwards and update us all over email." The executive who owns the meeting can always override, but it's a great way to show the other 198-teammates that you're being respectful of their time and focus.

14. HAVE A SCRIPTED CLOSING

Just like the opening, have a baseline script that you close with. Thank your teammates, hit some highlights that jumped out at you, give some personal commentary about your focus in the days ahead. This is also a perfect time for things like, "and, happy birthday to Mitch, who is dialed in from his Seattle home office!" Little personal touches like that go an incredibly long way to keep people connected into the culture.

15. TURN OFF YOUR ARRIVAL/DEPARTURE PING SOUNDS

Folks calling in may experience connectivity issues and need to redial. Don't let these glitches disrupt the flow of content.

16. RECORD NOTES, QUESTIONS AND DECISIONS

This is a knowledge management tool. Record your meetings, and they can be watched by teammates that weren't able to join and can be available for future reference. This is doubly important for companies operating globally, so you don't force people to dial into meetings at 3am local time routinely.

17. BE GENUINE

Most importantly, if you're running a large, remote forum, try to forget that there are hundreds dialed in. Just be yourself, talk as if there are teammates on the other end who need to hear from the real-you, and be reassured that they're still part of an effective and cohesive team! This is where leadership matters most.

Each of these tips are small individually – but they add up to a completely different, and radically more effective, remote meeting. They take discipline from the executives and meeting controllers to enforce but get easier with time and practice. Don't wait until everyone is in a remote-work status to start piloting these rules! Start today, with a few of the steps above, and build up from there.

Working remotely requires excellence in three categories

1

TECHNOLOGY

Necessary tech systems to effectively execute remote operations

2

BEHAVIORS

Participants know what behaviors increase the effectiveness of remote operations

3

STRUCTURE

Meeting structures that provide operational clarity for remote operations

1 TECHNOLOGY

Check the necessary technology systems to effectively execute remote operations

ORGANIZER CHECKLIST	TECHNOLOGY CHECKLIST	PARTICIPANT CHECKLIST
○ Video of main room	○ File Sharing	○ Archive of chat & files
○ Chat function	○ Raise-hand function	○ Phone dial-in option
○ File sharing	○ Mobile accessibility	○ Mute mic; Unmute before speaking
○ Archive of chat & files	○ Video for all presenters	○ Turn on video camera
○ Phone dial-in option	○ Mic for all presenters	○ Message moderator if you have an important point to raise
○ Recordable	○ Chat function available to all participants	○ Relay other relevant information via chat

2 BEHAVIORS

Know what behaviors increase the effectiveness of remote operations

Craft a Purpose

A **meeting purpose** allows all information and conversations to support the desired goal

Set Rules of Engagement

- Role model positive leadership behavior
- Seek opportunities to make decisions
- Connect with other teams and leaders, or on cross-functional opportunities
- Assume positive intent
- Be physically and mentally present
- Get the big issues on the table
- Ask direct questions to a team lead or individual

Define Roles

EVERYONE

- **Request** information that you need from others
- **Actively listen and identify what happened, what it matters, and what can be done about it**
- **Signal to the moderator** by showing your video or raising your hand if your input needs to be raised immediately

BRIEFERS

- **BLUF:** state a "bottom line upfront" (BLUF), your main point, before providing additional narrative
- **Keep your questions open;** you don't know who in the organization has the information you need
- **Pay attention** to time allocation, volume and tones

3

STRUCTURE PT. 1

Support and provide operational clarity during remote operations

GUIDANCE ON MEETING STRUCTURE

DESIGN	LEAD	ENGAGE
Set the Foundation for Information Flow • Align the team • Sequence meetings to ensure progress • Empower operations to manage meeting cadence **Define the Meeting Purpose** • Adapt meetings that you currently have • Decide the meeting format • Define meeting purpose **Structure the Agenda to Drive Outcome** • Assign an agenda owner • Use the objectives to inform the agenda • Allot time after agenda is set **Ensure that Attendees Know Their Role** • Invite participants who support the purpose • Define roles in the invite • Clarify prep needed	**Nail the First and Last Five Minutes** • Kickoff meeting with focus on objectives • Define desired outcomes of meeting • Close with actions required and next steps **Facilitate the Meeting, Don't Drive** • Provide continuity through guided discussion • Allow participants to play their role • Engage key voices **Seize Moments to Develop Team** • Reinforce right dialogue through feedback • Unpack leaders' process	**Focus on the Task at Hand** • Come prepared with objective and role • Use a camera • Re-orient to objective when needed **Move the Ball** • Identify the impact and dependencies when speaking • Answer "What? So what? Therefore?" • Clarify action items and owners **Use Candor to Connect** • Raise the tough decisions • Recognize valuable contributions • Direct discussion to each other, not leader

3 STRUCTURE PT. 2

Support and provide operational clarity during remote operations

GUIDANCE ON ROLES + RESPONSIBILITIES

ROLE	RESPONSIBILITES	HOW
SPONSOR	• Set the tone • Communicate importance of forum	• In opening comments, share current progress on major projects
FACILITATOR	• Execute logistics • Ensure accountability • Facilitates conversation	• Remind participants of expectations during forum • Assign and track action items
BRIEFER	• Input information concisely • Connect it to relevant lines of effort	• In 3 minutes or less, communicate "so what" and "therefore"
OTHER PARTICIPANTS	• Push and pull additional information	• Share link to materials on a similar past project

APPENDIX 7

Decision Making and Plan Development

Every large organization will experience a "strategic surprise." When it happens, what matters most is positive leadership that can inspire the best efforts of their team to achieve a successful outcome.

The purpose of this appendix is to provide a quick crisis action planning framework to help senior leaders organize their teams for action.

Three elements require excellence with crisis planning:

1. leaders must participate and engage;
2. crisis planning teams must leverage the experience and expertise of the entire organization;
3. the process must help the senior decision-maker "unpack their logic" to enable an effective decision. We recommend the McChrystal 3-Step Crisis Planning Framework.

Set Conditions

Assemble the Crisis Planning Team

- Ensure appropriate subject matter experts and experienced teammates from every key function across the organization are represented.
- Balance the planning team with leaders who will offer a contrarian view—avoid groupthink.
- Select a mature planning team leader who can remain relatively neutral to the ultimate outcome, keep the team organized, drive the process steps and ensure all critical voices are heard.

Provide Initial Leader Guidance/Context

- The senior leader must provide some initial background, assumptions, and context on the scale and planning horizon (e.g., what the organization needs to do in 60-days, 3 months or through 2020).
- Confirm the timeline when a crisis plan must be approved and communicated (e.g. must communicate something in 12 hours, two days or one week).

Three-Step Process (the decision-maker must validate each step before allowing the team to proceed to the next step)

The following McChrystal crisis planning framework provides a process checklist for "unpacking the logic" and leveraging the expertise of a given organization to shape an effective plan or major decision. It is critically important throughout the process that the crisis planning team be succinct and keep inputs at the executive level necessary to get to a decision. Otherwise, too much information will overwhelm the decision-maker and increase uncertainty.

Step 1: Scope the Crisis

Facts

- What resources are available? Capabilities? Capacity? Time & Distance?
- What known variables about the external environment impact on the decision? (Customers, Competitors, The Market?)
- Challenge the source of information; if an untrusted source, then a potential fact is probably better categorized as an assumption.

****Assumptions**

- What supposition(s) must be made to proceed to a decision?
- What information gaps must be validated to confirm a decision?
- The most critical discussion that must occur when "scoping the crisis" is to intellectually challenge the key assumptions.

Risks

- What are the risks if a key assumption fails?
- What are the critical concerns with the external environment?
- What are the key vulnerabilities of our organization?

What is Essential?

- What are the key actions/outcomes that must be accomplished?

PAUSE HERE. Brief the decision maker and gain approval to proceed to Step 2.

Step 2: Develop/Analyze Options

- Does the decision maker believe there are multiple options to address the crisis?
- Each option should be developed as a business case.
- Confirm the evaluation criteria that will be used to make a decision on the plan. Evaluation Criteria examples include:
    - Impact on the Market;
    - Quality of Customer Experience;
    - Fastest Solution;
    - Fewest Resources;
    - Short Term Risk v. Long Term Gain;
    - Do any of the variables deserve more weight than others?
- Identify the advantages and disadvantages of each option. Advantages/Disadvantages include:
    - Don't let the pride of ownership skew the result;
    - Logic should shape the discussion vice emotions;
    - Candor is critical;
    - Look for the vulnerabilities.

PAUSE HERE. Brief the decision-maker and gain approval to proceed to Step 3.

Step 3: Decide & Communicate

Crisis Planning Team Recommends/Leader Decides (the Decision Brief)

- Crisis planning team provides a coordinated recommendation.
- All equities (business units/functional groups) have an opportunity to provide comments.
- Capture inputs from business units/functional group leaders in writing.

Communicate the Decision

- Decision maker approves/modifies the plan and provides any additional guidance on implementation.

Transition to Execution

- Determine how often to transmit/reinforce.
- Roll out plan if required.
- Incorporate into the operating rhythm to monitor/control results.

** Contingency Plans are developed AFTER the base plan is complete. Development is accomplished by going back to your assumptions and changing one or two critical assumptions to a best or worst case and repeating the remainder of the process. Contingency plans are implemented IF one of the base plan assumptions proves to be false.

APPENDIX 8

Solutions Roadmap

McChrystal's Solutions Roadmap illustrates how we can serve our clients from the point of crisis into the new normal.

ACADEMY

The blue arrow bordering the top of the roadmap represents McChrystal's Leadership Academy and consists of two lines of effort.

1. Our Crisis Leadership Coaches have led during turbulent times at the highest levels of the military and civilian world. An hour spent with them could save many, many more in your near future.
2. Complementing our Crisis Coaching, we've rolled out a series of Leadership Crisis Webinars and Virtual Trainings that focus on offering practical and actionable value in under 90 minutes.

ANALYTICS

The blue arrow running along the bottom of the road map symbolizes the McChrystal Analytics wing, made up of two data-backed offerings.

1. Our Critical Risk Pulse, surveys newly distributed employees to provide leaders and organizations with feedback in under two days that is packaged by our team to inform leadership of actions that you can take right now.
2. The Crisis Response Tool dives even deeper and provides employee-responded insights by week's end that identify network influencers and allow you to act on crisis pain points.

IMPLEMENTATION

Finally, our three implementation teams run through the middle of the roadmap

1. Communications
   - Our communications team can stand up a Rapid Response & Execution Forum in a three-day turnaround, increasing your organization's speed of communication, depth of collaboration, and effectiveness of decision making.
   - Led by experts in remote work and digital leadership, our communications team can also implement a remote meeting system within 10 days, providing you with an operating rhythm, decision points, and feedback loops.
2. Red Team
   - Our Read Team experts can pressure test an organizations current plan against the uncertain climate in as little as two hours and uncover even more through their half and full day workshops.
3. Strategy
   - Finally, over three-day sprints, our Strategy team works beside leaders throughout industry to assess their current crisis plan and formulate how the organization must pivot to sustain their success.

McChrystal Group

McChrystal 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 **mcchrystalgroup.com** or email **contact@mcchrystalgroup.com**