



eModeration and Carrot Communications

Crisis planning and management for social media

A full crisis planning and management package



1. Introduction

With social media now part of the vast majority of marketing and communications campaigns, eModeration and Carrot Communications have combined their expertise in community management and digital communications to create a crisis planning and management package that includes managing a crisis unfolding over social media. This document will take you through the separate modules that make up the crisis planning and management package and give you an idea of what to expect from this hands-on and highly practical process. The modules can be commissioned individually or as a complete package.

If you would like to discuss any aspect of the crisis planning and management modules please do not hesitate to contact either Tamara at eModeration or Kate at Carrot.

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2. Crisis workshop

This half-day workshop is designed to help brands integrate social media to their existing crisis plans, and is facilitated jointly by Tamara Littleton and Kate Hartley.

Aim of session:

- Attendees will have a better understanding of the impact of social media on
 - how a crisis unfolds
 - how a crisis is handled
 - how damage from a crisis can be minimised
- Attendees will leave the session armed with actionable advice and tools to:
 - Integrate social media to existing crisis plans
 - Monitor and manage a crisis as it unfolds
 - Respond to communities in crisis in order to minimise damage

Structure of session:

The session is workshop-based, rather than presentation style. We split the session into four distinct areas:

1. Examine **case studies** of companies who have managed their communities through a crisis – whether a 'real world' crisis like Nestle or BP, or a 'virtual' crisis such as Peta's Facebook-based brand attack on DKNY. Tamara and Kate will discuss in depth how the crisis for each unfolded over social media and what each company did to manage it – the good and the bad

2. **Practical tools** of social media crisis management. This section of the workshop will look at what tools can be put in place for crisis readiness, and how to prepare for (and reduce the likelihood of) a crisis. It will cover:
 - a. Monitoring online chatter to spot a crisis early
 - b. Integrating social media to existing plans
 - i. Adapting messaging for social media
 - ii. Plans, processes and policies
 - c. Solving practical issues around creating social media elements for those plans, and brainstorming solutions
3. **Crisis scenarios.** This is a workshop to discuss, confidentially, the kind of crisis scenarios that the brand might face. We ask each attendee to come armed with a likely or possible scenario facing them, and examine the impact social media might have on that crisis. This session gets the whole group involved in creating solutions and is geared towards helping attendees 'think digitally' about these scenarios
4. **Crisis simulation.** Using an invented scenario, we role play how a crisis will unfold over social media. Attendees will be put into teams to play 'brand attackers' and 'brand defenders' so they can see the direct impact of different actions on communities' responses.

Preparation: Each attendee should think up a likely or possible crisis scenario affecting a brand they work with (or a competitor of that brand). The kind of things that might arise such as health scares, recalls, medical testing issue, environmental issues etc.

Cost: the half day workshop costs £5000, including use of the simulation tool, all preparation and follow up materials.

Crisis process audit

The first stage of crisis planning is to understand just how prepared you are for a possible crisis. We do this by running a structured but practical audit of the materials, systems and processes that are in place currently, including social media communications and management practices; and identifying where there are gaps, or improvements to be made.

The audit is split into two main sections:

Processes audit

- Written processes – a detailed analysis of the existing processes with specific attention to:
 - Completeness:
 - Do the processes cover all aspects of the organisation's operations?
 - Do they include social and digital media?
 - Is there a crisis management team identified?
 - Are the contact details and passwords up to date and correct?
 - Is the crisis plan easily available 24 hours a day, seven days a week?
 - Is there a practical and understood revision system for the processes?

- Team preparedness:
 - Face-to-face interviews with key members of the crisis team to test their understanding of the processes and policies
 - Are resources sufficient to manage a crisis, or are standby resources available?
 - Are the team members trained and used to using social media?
- Scenario testing:
 - Review and testing of crisis scenarios that the crisis plan and processes address
 - Are they up to date?
 - Do they address social media specifically?
 - Are they realistic?
 - Have they been used and if so when with what result?
- Social media management
 - Social media monitoring system (spotting the issue early) and response
 - Social media management policies
 - Social media team and resources
 - Approach to managing online audience communities owned by the brand (such as Facebook pages, Twitter streams etc)
 - Approach to managing online audience communities not owned by the brand (such as review sites, forums, blogs, 'unofficial' pages etc)

Gap analysis

- Documentation of gaps in plans, processes and resources necessary to successfully identify and management of potential issues and crises
- Recommendations for suggested improvements
- Identification of brand team to carry out improvements to plan, and timeline for completion

Output

- A clear, written, action plan of changes and developments required for crisis plan and processes to be effective

Cost

Costs will be agreed with the client before work starts, and will be based on the scale of the audit (taking into account factors such as number of client locations, size of team to be interviewed, number of client brands for review).

Our cost is built on an initial senior level consultancy rate of £1500 per day, and a lower, variable rate for any follow up work, based on level of staffing required. All costs are in line with industry standard rates and will be quoted before work starts.

3. Crisis preparation package

For brands that are serious about being prepared for a crisis, particularly in a social media landscape when crises unfold in real-time, developing a comprehensive crisis management plan is crucial. This module covers every aspect of the planning process from issues identification through identifying a crisis team to an immersion day.

Team identification

The make-up of a crisis team will differ from organisation to organisation, but the key is to make sure that it represents all aspects of the operations required to manage an issue or crisis; and includes an overall co-ordinator who has a view of activity across all channels. We will work with the crisis leader (usually a communications director, or equivalent, who has sufficient seniority to set strategy, agree direction and direct tactics) to identify the crisis team and designate responsibilities.



Business and communications issues identification

All social media and crisis communications issues are directly connected to the activities of the company or organisation, so the starting point for the identification of areas of potential weakness is a detailed review of the organisation's operations in order to identify possible crises. Issues vary from company to company, but could cover areas such as environmental impact, product development, natural disaster, accident, litigation, employee action, campaign activism, economic or market issues, competitive action or production issues. These are documented, and recommendations made on how to avoid an issue developing into full-scale crisis.

Where it is possible to predict a likely issue (for example, transport accident or employee action), a response plan is created so that if the issue breaks, plans can be put into action immediately.

Issues Response: policies, processes and infrastructure

While it is not always possible to draft detailed statements for all potential issues at this stage it is possible to prepare:

- Issue monitoring - identifying an issue early enough to minimise damage
- Documented policies to handle each issue – covering operations, stakeholders and communications; and including social media response policies
- Communications infrastructure - including dark sites; social media platforms (passwords and access); third party suppliers; telephone numbers (mobile and fixed); email addresses (corporate and personal)

- Communications materials – those materials, such as company background, facts and figures, holding statements, tone of voice, can be prepared in advance at this stage
- Spokespeople – training of spokespeople to handle face-to-face; telephone and online interviews
- Community management - identify and train crisis team in managing real-time conversations over platforms such as Facebook and Twitter, through the crisis period. Staffing levels can be scaled as required
- Escalation processes - 'levels' of issue and the appropriateness of response to each issue (avoiding 'firestorms')

Audience identification and communication channels

Understanding who you need to reach, who influences them and over what channels they communicate, is critical to managing a crisis. Typical audiences and influencers would include:

Audiences

- Employees
- Customers
- Investors
- Suppliers
- Competitors

Influencers

- Online communities
- Bloggers
- Tweeters
- Media
- Specialist lobby groups and campaigners
- Others specific to industry

The channels over which these audiences and influencers communicate can be identified, and strategies for managing each agreed in advance, including: tone of voice; message and consistency; appropriateness of response by channel; appropriate spokesperson by channel, etc.

Scenario planning

Potential issues should be segmented into two parts:

Issues that can be avoided by taking business action

These are issues which, with the appropriate business action, can be avoided altogether (an example of this might be procurement chain that hasn't been thoroughly examined, or the environmental impact of a particular business practice).

We work with you to undertake a risk analysis, examining the potential reputation risk versus the business advantage of any given scenario. Written recommendations will be provided so that the appropriate business section leader can make an informed decision about taking avoidance action.

Issue avoidance measures might include: social media policy; environment and ethical trading review; procurement and supply chain review; product safety checks review, etc.

Issues beyond the control of the business

For example, natural disasters, accidents, product recalls etc.

Scenarios for the issues identified as part of the crisis preparation plan will be developed, including:

- Issue definition
- Agreed response
- Crisis team
- Communications channels, including social media
- Management of live communications, including Twitter, Facebook, blogs, review sites and forums
- Communications processes
- Immediacy of response and response schedule
- Desired outcomes

Crisis workshop

This is an optional service provided to present the findings of the crisis audit and plan to the board, or the crisis team.

The session is facilitated by eModeration and Carrot and involves the crisis team members in discussions to agree crisis scenarios, address issues and areas of concern, and discuss the business impact of taking steps to avoid a crisis. It also allows team members to understand fully the processes and policies in place and the team's specific roles in the implementation of the plan.

Costs

Costs will be agreed in advance with the client, and are based on industry standard daily rates for senior consultants, at £1500 per day.

4. Crisis simulation training

This is a full immersive role-play simulation which is designed to train the crisis management team in how to handle a 'real life' experience of managing a social media crisis using all available channels and previously prepare policies and procedures. The simulation tool that we use has been developed by eModeration and Carrot Communications and uses a team of community managers to present a realistic simulation exercise. This is done in a secure, private environment.

- **Option 1: social media crisis training**

- This is a workshop-based simulation and training exercise
- All of the crisis management team will be included in the drill
- The drill will follow a pre-prepared scenario identified in advance with the senior crisis team
- Within the scenario are fact patterns that will include all relevant communications channels and may include:
 - Facebook ('owned' and 'unofficial' pages)
 - Blogs
 - Communities, forums and review sites
 - Twitter
 - YouTube
 - News sites
- The crisis team will learn how to deal with a developing crisis across different channels, with the ability to test the effectiveness of different responses
- The session will be facilitated by Tamara Littleton and Kate Hartley, who will provide full training through the session.

- **Option 2: full crisis simulation**

- A full social media crisis simulation is designed to test the policies and procedures developed in previous modules; and can be linked to a media training programme.
- The crisis team will manage communications across all social media and traditional channels:
 - Spokespeople will be interviewed online; on camera and the telephone
 - The crisis will develop in real time as the community and stakeholders respond to the actions of the crisis management team
 - Private, simulated websites, Twitter feeds and communities ensure that the drill is as realistic as possible
- The drill will be facilitated by eModeration and Carrot and played out in real time
- The facilitators will 'stop the clock' at points in the drill that require discussion to ensure that necessary changes to policies and procedures are understood and recorded

Output

Beyond the learning from taking part in the drill itself organisations will receive a full written report detailing any gaps in their processes and policies and recommendations on how these can be addressed

Costs

Costs will be agreed in advance with the client, and are based on industry standard daily rates for senior consultants, at £1500 per day.

About eModeration

Founded in 2002, eModeration Limited is an international, specialist social media management company. It provides multilingual community management and content moderation to clients in the entertainment and digital publishing industry and major corporate clients hosting online communities and consumer-driven ad campaigns.

eModeration's team of moderators and staff are the key to eModeration's success and excellent client list. eModeration draws on the expertise of carefully recruited and trained moderators located mainly in the US and Europe with specialist editorial and community moderation skills, which are matched uniquely to the client. The company can moderate 24/7 and provides cover for over 50 languages. All its moderators are managed online from eModeration's headquarters in London, United Kingdom.

About Carrot Communications

Carrot Communications is a social communications and PR agency. It specialises in the creation of conversations between fast-growth companies and their audiences, online and offline. It creates communications and PR campaigns to accelerate and manage the reputation of brands with their target audiences, whether that's existing customers, prospects, new markets, investors, employees, potential recruits, influencers (including media) and stakeholders.

It is run by Kate Hartley, who has extensive experience in running crisis management programmes for household name brands.