



# Leading & Operating in Crisis

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As the Crisis Hits Your Door...

Take Time to Ask Yourself the  
Following Questions ...

- What are the beliefs and values that will guide decision making?
  - What is our overriding mission during this time of crisis - the organization's survival or something else?
    - What will be perceived as success when we look back upon this crisis?
      - Do the needs of the many outweigh the needs of the few?

# What is your mission?

Many competing priorities in a crisis situation; how has your mission changed?

After you have established your  
mission,

What are your operating principles?

How have these principles served  
humankind in the past?

# Operating Principle #1:

## Assemble The Right Leadership Team and Mentality



# Assemble The Right Leadership Team and Mentality

- Make sure the right people with the right skills are present – diversity of experience and thought are critical - rank, position, ego can be barriers to making effective decisions
- Pull people from various stakeholder groups that are critical to the response -tell them to send their best
- All leadership team members have a perspective– all should have a voice
- Provide guidance and dedicate resources to the leadership team
- Eliminate ego – be ready to change/reverse decisions without judgement
- Undue emotionalism is a barrier to effective decision making - process emotions separately
- Be aware of how productive conflict turns unproductive
- Focus is on assimilating, understanding, visualizing, directing, and leading
- Avoid group think - identify a Devil’s Advocate to challenge decisions
- Ensure risk/reward examination is part of mentality



# Assemble The Right Leadership Team and Mentality

**Historic Example:** President Kennedy: Bay of Pigs and Cuban Missile Crisis

**Jonathan Example:** War Gaming Before Conducting Operations



# Operating Principle #2:

## Buy Time

# Buy Time

- Allows you to gain situational awareness
- Conserve resources immediately – cash, people, materials
- Ensure shared understanding of the situation and resources across the leadership team (and organization if you can)
- Don't make decisions until you have to or it is in your best interest to do so; premature decisions are hard to suck back
- What is seemingly urgent might not be truly important
- Allocate resources in accordance with priorities
- Have tactical patience

# Buy Time

**Historic Example:** IBM Reimagining It's Business Model To Survive

**Jonathan Example:** Seizing Dominant Terrain to Buy Time for Additional Resources to Arrive

# Operating Principle #3:

## Continuously Gather Data and Learn

# Continuously Gather Data and Learn

- Create critical information requirements: what do you need to know?
- Information must be accurate and objective; be aware of hidden bias. Identify trusted data sources: CDC, FDIC, CNN, NPR, MSNBC
- Information will be coming from 360 degrees
- The first reports are generally not 100% accurate
- Consider forming a fusion cell to gather, analyze, interpret and distribute information as well as make predictions
- Data centric - Not emotionally driven, opinion or knee jerk reaction. Skip the anecdotal data
- Get above the situation – try to anticipate the new normal
- Learn from successes and mistakes – fail forward fast - learning is critical to being able to adapt to the new environment forming

# Continuously Gather Data and Learn

**Historic Example:** General Electric Impact Program

**Jonathan Example:** Fighting for Information:  
Provoking the Enemy Into Reacting So We Can Learn  
More About Their Capabilities

# Operating Principle #4:

Identify all Possible Scenarios & Take  
Action

# Identify all Possible Scenarios & Take Action

- How has this event impacted my entire organization? What are our capabilities? How have they been diminished/enhanced?
- Explore a wide range of options initially, then narrow focus based on needs/capabilities. Start to develop priorities, provide intent to guide actions of organizational leaders
- Identify what needs to be done sequentially and identify what can be done in parallel; execute in parallel whenever possible
- Constantly assess and reassess as information becomes available
- How will this impact not only our operations but upstream and downstream supply chain?
- Leverage technology wherever it makes sense
- Wargame all possible course of action
- Is there any way this crisis can serve to our advantage?
- Can we help those in our community/industry through this crisis?



# Identify all Possible Scenarios & Take Action

**Historic Example:** Shell Global Implements Scenario Planning

**Jonathan Example:** Course of Action Development in the Middle of a Combat Operation

# Operating Principle #5:

Continuous, Bi-Directional Communication

# Continuous, Bi-Directional Communication

- Communication has to flow bi-directionally through the organization
- Be aware of where there is information bottle neck – traditionally the middle layer of the organization
- Let your people help develop your awareness and guide your thinking

# Continuous, Bi-Directional Communication

**Historic Example:** President Lincoln and The Telegraph

**Jonathan Example:** Friendly Fire, May 2004



# Operating Principle #6:

## After Action Review

# After Action Review

- Examine what was supposed to happen, what actually happened, what went well, and what needs to improve?
- Identify the gaps and assign people to fix what needs to be fixed
- Document, document, document
- It is not a lesson learned until behavior changes

# After Action Review

Historic Example: After Action Review at the Joint Readiness Training Center

Jonathan Example: Learning from our Experience in Combat: Chasing Insurgents in Diwaniyah, Iraq



# Summary: 6 Operating Principles

- 1. Assemble The Right Leadership Team and Mentality**
- 2. Buy Time**
- 3. Continuously Gather Data and Learn**
- 4. Identify all Possible Scenarios & Take Action**
- 5. Continuous, Bi-Directional Communication**
- 6. After Action Review**