



Exercise & Simulation Services

Exercises and Simulations, when properly designed and managed, can achieve two objectives:

- help participants crystallize theoretical knowledge into useful skills and capabilities that will be essential to the successful management of a crisis situation.
- help organizations assess the effectiveness of their plans and the capabilities of their managers and staff.

Each exercise or simulation should be designed with one, or varying degrees of both, of these two objectives in mind. It is important to note that, in most circumstances, people need to learn to walk before they can run. It rarely makes sense to throw your organization into a “testing focused” exercise before you have run a “training focused” exercise. If do “throw them to the lions,” you may be able to identify some errors in your plan (which is a good thing), but many of the lessons learned from such an effort may be significantly distorted and individual participants may learn incorrect and non-productive behaviors.

It is always best to approach exercises and simulations as a natural progression from plan development and training. Typically, we first seek to train individuals on individual skills then work gradually towards more complex learning experiences where we teach collective skills to groups of people. At various points along this learning curve we may introduce confirmation exercises, to cement the knowledge gained and behaviours learned, before progressing to more complex lessons and behaviours. Only once we are comfortable that knowledge and skills have been learned does it make sense to test that knowledge and those skills.

Plan confirmation and testing can happen along a parallel track. However, the penultimate test of a plan - a realistic field simulation - can only be useful when key participants are fully trained in their individual and collective roles.

Over 20 years experience

At TOWHEY Consulting Group, we have over 20 years experience developing, managing and drawing lessons from a range of customized exercise and simulation types. The most commonly used exercise types include:

- In-basket exercises.
- Table-top Exercises.
- Tactical Exercises Without Troops.
- Field Exercises & Simulations.

Custom exercise development

We build customized exercise and simulation scenarios to meet the unique needs of each client and its plans. Typically, clients will want to exercise their existing plans to confirm plan validity, crystallize management team knowledge of the plan and their individual and collective responsibilities, enhance individual and collective skills and embed critical behaviours. Because each organization and each plan is different, our highly skilled consultants will start each engagement by learning about your organization and understanding your plan. They will typically conduct a Plan Review prior to developing your exercise, then will work closely with you to identify specific *Learning Objectives* for each exercise. Once you have established a budget for the exercise or simulation, our consultants will work closely with you to design the best possible exercise or simulation experience to meet your objectives within your budget.



In-basket Exercises

IBE are theoretical exercises designed to confirm understanding of a plan and to test the effectiveness of procedures. They typically run from a ½ day evolution through multiple day formats and involve an injection of scenario-driven requirements into the normal daily work pattern of participants. In some cases, participants will continue normal work patterns - in others, they will focus entirely on the exercise scenario and normal operations will be suspended, or will continue while working around participants.

Example Scenario: Major hurricane *
Tested Element: Senior Management Team (SMT) of a global oil company

The exercise began with an email alert from corporate communications that media reports were tracking a major storm developing in the South Pacific that could impact on Gulf of Mexico operations. Subsequent reports tracked the development over a four day period of the storm and the ultimate issuance of voluntary evacuation orders by the government of Louisiana, Alabama and Florida. During the exercise, SMT members were required to determine at which point they would activate specific protocols embedded in their Crisis Management Plan and issue specific instructions to move personnel, shut down operations at specific facilities, relocate support operations and transfer operational taskings between divisions.

Sample lessons learned:

- Failure to inform Sales & Marketing early on led to poor customer communication.
- Late warning to corporate treasury of operational issues exacerbated financial impact.
- Unable to locate contact information for new managers in two affected sites.
- Overall, CMP was well-designed to manage a hurricane event.

Table Top Exercises

TTE are designed to confirm understanding of a plan and to test the effectiveness of a plan or a management team. They require focused commitment from participants throughout the exercise period, which usually last from ½ day to 2 days. TTE can be designed in two major forms: *Controlled* or *Directed*. In a *Controlled TTE*, three major people-elements are involved: the **tested element** comprises the participants who will experience the exercise, a **higher control element** represents the next level above the tested element in the corporate structure, and a **lower control element** represents internal and external stakeholders. In this form of TTE, scenario inputs are delivered to the tested element through real-time interaction with the higher/lower control elements, creating a compelling real-time experience well-suited to identifying errors in procedure, planning and communication. In a *Directed TTE*, there are no higher and lower control elements and scenario inputs are provided directly to the tested element by the Directing Staff. Stakeholder interactions with the tested element are simulated by Directing Staff. *Directed TTE* are more economical than *Controlled TTE* and do a good job of confirming individual knowledge and skills, but may leave untested some critical communication competencies.

Example Scenario: Pandemic Outbreak *
Tested Element: Crisis Management Team (CMT) of a pharmaceutical company

The exercise began with a telephone call from a Lower Control player representing the General Manager of the company's Shanghai production facility, to the COO reporting a drop in production due to 40 per cent absenteeism caused by an outbreak of flu. At the same time, the VP Human Resources received an email message advising that the WHO was reporting a possible outbreak of H5N1 variant virus in the Shanghai region. As the scenario unfolded, CMT members were required to develop an accurate sense of the situation from realistic information sources and make decisions about: when to alert other divisions about the situation; when and whom to call for assistance; when to close down facilities; when to alert customers; how to manage employees through a major crisis; etc.

Sample lessons learned:

- While some info is not "must know" for every executive, it would have allowed managers to better anticipate and prevent issues.
- Reporting procedures in plan took too long and focused on the wrong details.
- Increased confidence that early warning would help other divisions mitigate impact.
- Business leaders recognized strategic planning value of input from corporate communication and HR departments during crisis.

Tactical Exercises Without Troops

TEWT are a concept borrowed from the military and represent one of the most effective, most economical forms of exercise available for confirming/testing individual knowledge and management skills and for testing individual plan elements. TEWT are focused on managers and leaders and require their focused commitment throughout the exercise period, which typically lasts for ½ day to 1 day. Participating managers are exercised on a real job site where a real crisis may occur: they are presented with a managed stream of scenario-driven information and are required to assess the information, make plans, prepare instructions for their teams, and deliver reports in real time. These exercises provide an excellent level of tactical practice for managers and leaders - without requiring the expensive commitment of an entire workforce.

Example Scenario: Workplace Shooter *
Tested Element: Campus Crisis Management Team (CCMT) in a college

The exercise began with news of shots being fired in one wing of the college's main lecture building. CCMT participants were assigned to various classrooms in the "affected" wing and were given 5 minutes to consider how they would respond, if they were classroom faculty, to the sounds of gunshots from the main lobby. Participants discussed how faculty should react, and identified areas where additional guidance should be provided to faculty. Participants then were given 15 minutes to consider their own real world roles and what their priorities would be during the initial containment period of the crisis. Participants also spent time walking through the roles/tasks of: classroom leader evacuating students to a safe area; classroom leader managing a lock-down situation in a classroom or other location; senior manager on-site during a shooting situation; managing media communication; managing parent/staff/community communication. Finally, participants were asked to walk through post-event activities.

Sample lessons learned:

- Existing guidance to staff lacked detail and could be confusing.
- Existing plans did not consider return-to-normal operational challenges.
- Existing public communication infrastructure inside the facility needed upgrades.
- Better coordination with local police should take place before a crisis.

Field Exercises & Simulations

FES are the penultimate test of a crisis plan and the people who will make it work. They require a large scale commitment of resources from an entire organization, or division, and typically last from ½ day to 2 days. During this period, the entire participating organization will be focused on the exercise scenario and normal operations will be significantly impeded or shut down. FES may involve large numbers of "actors" playing stakeholder roles - or real-time interaction with cooperating real world stakeholders such as emergency services, hospitals, regulatory agencies, vendors, community groups, neighbors, etc. They can produce extremely realistic experiences and, when properly managed, produce exceptional learning opportunities for participants and realistically test plans and procedures.

Example Scenario: Major Facility Fire *
Tested Element: Facility Management Team (FMT) of a logistics facility

The exercise began with a fire alarm in a shipping container storage facility during a regularly scheduled FMT planning meeting. As the facility's First Response Team used standing hoses to fight a fire in the tractor re-fueling area, a simulated explosion occurred. One person was killed, two more critically burned. The explosion toppled containers across the main route in the yard and spread the fire to nearby containers. FMT had to deal with many challenges: city firefighting equipment could not access all areas of the yard because routes were blocked; injured employees required immediate first aid and evacuation to ambulances; next of kin had to be notified and supported; container contents had to be verified for hazardous contents; some containers had to be moved; constant coordination with firefighters was required.

Sample lessons learned:

- Some fire safety equipment did not work, other items were inconveniently located.
- Some first responders were absent and back up staff were not as well trained.
- Switchboard operators were unable to manage an influx of calls.
- News media were managed well, but the plan did not provide for a large number of local people and employee family members who arrived at the facility.

thecrisisgroup

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Exercise & Simulation Services

For more information

For more information on Exercises and Simulations, and how we can help your organization become stronger and better able to manage through any potential crisis, contact us today.

Contact us today

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*NB. To protect the confidentiality of our clients, we must stress that the examples used in this document, while based on real exercises and realistic in terms of attributes and lessons learned from similar exercises, are fictional in terms of specific detail. None are based on real client engagements. Rather, the examples have been written as realistically as possible and reflect typical exercise attributes and common lessons learned.

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