Considerations for key management and decision-makers:

* Succession planning is critical in emergencies. Identify, in advance, who will be responsible for important decisions and assign at least one backup or alternate personnel. For example, who can approve and/or access funds for emergency services or supplies if the individual who normally makes those decisions is unavailable?
* Revisit existing plans and assumptions. Challenge the assignment of roles and responsibilities against new worst-case scenarios and adjust plans as necessary.
* Conduct a regular review of your “Personnel Backup” plans, annually or in the event of organizational changes.
* Do not restrict succession planning to your executive management level. You undoubtedly have personnel with unique or specialized training/experience on whom you rely heavily.

Considerations for key personnel:

* Assess your essential processes and the personnel who are responsible for them. In an emergency, department managers may not be the only key personnel. You may have personnel who operate specific equipment or who have received specialized training/certifications.
* Collaborate with managers and process owners to identify the right backup personnel for each of your essential processes and roles.
* Document essential processes and individual tasks thoroughly. Having clear documentation increases confidence and will ensure that backup personnel do not overlook important tasks or decision points in an emergency.
* Introduce cross-training, job sharing, or job rotation with personnel who may need to serve as backup.
* Where possible, pool your personnel and resources for interconnected processes, systems, or collaborative technologies. This builds capability and resilience into your day-to-day operations.
* Ensure you have more than one individual who can recover IT capabilities (e.g., email) and access stored data.

Considerations for training backup personnel:

* Validate that appropriate training is conducted by holding each party accountable (trainer/trainee).
* Assign cross-training as a professional development activity and include it as part of your performance evaluations. This helps backup personnel understand how the business functions within networks, builds appreciation for roles and relationships, and supports retention by increasing opportunities and flexibility within your workforce.
* Provide backup personnel with opportunities to practice assigned tasks during normal operations. This builds experience, confidence, and trust before they have to step in during an emergency.
* Use personnel vacation periods as an opportunity for cross-trained backup personnel to practice. Afterwards, evaluate the performance with both parties to address any gaps or areas for improvement. Be sure to document any areas that were overlooked or unclear so they can be used as references in the event of an emergency.