There is an essential word in the field of emergency medicine. The word is triage. “Triage (verb)—the process of determining urgency and priority of treatment based upon the severity of condition and the likelihood of recovery with and without treatment.”

ER doctors and nurses have certain steps they follow as they practice the art and science of medical triage—vital signs, responsiveness, severity of injury in one patient when compared to another—hard, quick decisions are made that promise quick treatment to one and the delay of treatment to another.

Triage first. Treat second.

That’s where we all are right now, isn’t it? Each organization is trying to determine how bad it is, how soon they might recover, and what to do to aid their recovery.

I’m sure you’ve already attended your fair share of webinars and Zoom calls to gather as much advice and information as possible in order to conduct your own organizational triage. Me too.

Here’s what I’ve heard and sorted through that seems essential for leaders in a time of crisis. Each of these seven areas represents a central need, a mandate, leaders must attend to, both now and for the foreseeable future.

1. The Need to Lead in Time of Crisis

First and foremost, leaders must lead. Let’s be honest, we’ve all experienced a bit of shock and denial over the last few weeks. The virus was distant, someone else’s problem. We considered ourselves strong, vibrant, maybe even immune.

But that’s not the case now, is it? Coronavirus is a biological natural disaster of yet unknown proportion and impact that demands our global attention. This external disaster has invaded our organizational reality. Take heed, within a state of shock, or denial, we are prone to stop and stare at the things happening around us and to us.

Leaders must step forward, break the spell and define their organization’s reality. Will the pandemic continue to define reality? In the short term, yes. But now is the time for leaders to gather their people and lead their organization. Lead into the unknown with a posture of candor, courage and commitment to stay the course whether the road to recovery is short or long.

2. The Need to Care for One Another

The first message leaders must send, is a call to care. I’ve already seen leaders so consumed with what to do, they have neglected their own self-care. Stop. Take care. Rest. Adopt the rhythms and habits of self-care (physical,
mental, emotional and spiritual) and then transfer those practices to colleague care. Are you taking care of your people, and are they taking care of themselves? Preach that message. A healthy, whole organization supporting one another on-line and on site is the standard.

From there, that same spirit of care and connection should be applied to your clients. They aren’t just customers, they are the people with whom you’ve entered into a mutually beneficial relationship, now is the time to focus on the relationship; express your hope for their well-being.

Let’s start and act here. Convey a spirit of care for one another—within and without!

3. The Need to Focus & Assess

Despite the natural tendency to shift into emergency mode, seeking quick answers and taking spur of the moment action to “fix things”, we need to take time to focus:

- Focused Assessment
- Focused Message
- Focused Action

Leaders and leadership teams much conduct concentrated assessment exercises to ascertain where the organization, its resources, its finances, its services and products and its clients are. Then, construct and convey a focused message—both internally and externally—about what the organization will do and be in the weeks ahead.

Then, only after this time of focused organizational triage, will it be appropriate to take definitive, rather than knee-jerk, organizational action.

4. The Need to Face Financial Challenge

Linked directly to the need to assess is the need to face your financial challenges. Don’t ignore the hard questions. Did you created liquid, cash reserve that serve you well now? What financial runway does it provide for you?

Chart your revenue projections against anticipated revenue realities. Do the same with expenses. What is the delta? Develop a tiered approach to dealing with financial challenges. What for-profit programs and products will generate the most revenue during the pandemic? Are there pandemic-related services you can provide, at what cost/benefit? What nonprofit appeals will yield the most impact and support? What preemptive expense actions can you take? What services might be paused? What is the potential impact of the CARES Act to your bottom line? What about your largest expense, personnel? Put it all on the table.

Create financial contingencies based upon both revenue realities and potential expense constrictions. What are your versions of mild, modest and severe cuts? Based upon reserves, anticipated revenue and realistic expense, what are the triggers that will move you from Tier One—a 10% reduction, to Tier Two—a 20% reduction, to Tier Three—a 30% or more reduction?

5. The Need to Identify Essential Services

For the season of pandemic, there is no such thing as business as usual. As you continue your assessment, determine, what are the primary products and services we will continue to offer? Can we change our delivery modalities in cost effective, pro-active ways?
Approach all these decisions as a leadership team. Make these decisions together, for the good of the organization as a whole. Check your silo at the door. Just as in the area of resources, create tiered delivery priorities for your services, products and programs. Identify:

- Primary Services
- Limited Services
- Suspended Services

Within the organization, communicate early and often the nature of these conversations. Be vulnerable and candid. Ask for ideas. Don’t announce, engage. Then, when you do announce, people will understand. It will still be hard, but inclusion fosters belonging, and we want our people to belong long after the virus has dissipated.

6. The Need for Contingency Thinking & Planning

All of the assessment and prioritization and decision making needs a framework—a plan. Transfer the energy normally focused on long-range strategic planning and focus it on contingency planning.

Take all these matters and collect, collate and develop a “Survive & Recover Contingency Plan with Three Scenarios”. Create an operational framework for this season that addresses:

- Your Commitment to Our People and Our Clients
- Your Financial Realities
- Your Essential Services
- Your Recovery Scenarios
  - Quick Rebound 3-5 months
  - Gradual Restoration 6-11 months
  - Slow Renewal 12-18 months

Then, develop a “war room” posture and protocol to monitor and manage the administration of your contingency plan. Stay focused. Keep to the essentials. Hold one another accountable. Be nimble. Make hard decisions when necessary. Celebrate small victories. And by all means, care for one another.

7. The Need to Raise Your Rallying Cry

Lastly, create a “rallying cry”! Declare to those within and without, who and what you’re going to do and be in the season of pandemic and beyond. (Thanks to Patrick Lencioni for this encouragement.)

Make it short! Two words, five if you must. Be positive, mission focused and pro-active. Use your rallying cry to marshal the forces to survive and eventually thrive.

Now, go out there and lead! They need you! We need you! Help all you serve as we walk through this season of survival, into the season of recovery, until we finally arrive at a season of renewal and revisioning. May God bless you all in this important endeavor!