

PLANNING AND LESSONS LEARNED

Here's a set of resources for Business Continuity Planning (something we should all be doing right now) IMHO along with Business planning. Lessons Learned from China and Lessons Learned with the effect on Supply Chain are in this email - Again in a summary form so you can decide quickly if it's something you need:

DYI Continuity Planning - This is a template from my Vistage group. If you do nothing else (unless you have a plan) do this! I am available to brainstorm evenings and weekends to help with this. Just email, call, or text **(see attached)**

DYI Business Plan Financial Workbook Example - This is a workbook that Cassey found and I've forgotten who the source came from. I know everyone is at different levels so some this is a good place to start. Again I am available to help. **(see attached)**

Amazing Services that I want to bring to your attention - **from our SGAB advisor Patrick Wheeler:** Mazars is offering services for the **pandemic event preparedness** for employers. Mazars has a two-phased approach to respond to the crisis. Phase 1 - Rapid Response including a pandemic business assessment, employee health and safety, communication and outreach, and long-term planning and recovery. Phase 2 - Organizational Resilience Long-Term Strategy & Planning to ensure your business maximizes its resources to limit the effects of future business disruptions on your processes, people, resources and technologies. It involves establishing an effective emergency preparedness planning and communication strategy and implements a culture of preparedness across your business units.

For more detail and contact information see here: <https://mazarsusa.com/consulting/pandemic-event-preparedness/>

Plus additional resources from his company **(see attached)**

Business Continuity and Disaster Planning for Your Small Business: - From our Business Partners Wells Fargo: Valuable information can be found in this article, including things to have prepared and on file and prepared in case of any disaster: Critical business operations, contact lists of current employees and customers/vendors, documenting bank accounts, lines of credit, and payroll services and who can access them, a list of systems and software your company uses and where your business stores critical data.



For more detail, see the article here: <https://wellsfargoworks.com/management/article/business-continuity-and-disaster-planning-for-your-small-business>

For tips on creating an emergency action plan, see here: <https://wellsfargoworks.com/management/article/planning-for-workplace-emergencies>

For information and a tool to help write a business plan, see here: <https://wellsfargoworks.com/planning/writing-a-business-plan>

How Chinese Companies Have Responded to the Coronavirus - Harvard Business Law Review published this article with experience of 5 individuals that have assisted Chinese enterprises with their recovery plans. They've summarized **12 lessons companies** have taken advantage of for US businesses to learn from. Some of the most useful: While top-down efforts are paramount at this time, they stress a need for decentralized initiative-taking for larger corporations, and reallocating labor flexibly to different activities and roles. They also make a point to expect different recovery speeds for different sectors: tech software, healthcare equipment and services recovered quickly in China after the initial hit and are up 112%. We should also expect new consumption patterns to emerge post-crisis (online resources will likely be utilized much more, as China embraced e-commerce post-SARS).

For more detail and lessons see the article here: https://hbr.org/2020/03/how-chinese-companies-have-responded-to-coronavirus?utm_medium=email&utm_source=registrants&utm_campaign=covid19readinglists_20200318&deliveryName=DM72959

Coronavirus Supply Chain Lessons - A very useful packet that takes lessons learned from the SARS outbreak and applies them to the COVID19 crisis. The highlights of a proactive response analyzation include: 1) Protect your most valuable asset – people, 2) Assess your value chain to identify current vulnerabilities and risk, 3) Ensure your Business Continuity Plans & Protocols are up to date, 4) Develop redundancy assurance with critical vendors and sole source suppliers. For more information (**see attached**)

Using Credit to Weather Disruption: Wells Fargo - On planning for emergencies when it comes to credit. 1) Apply for credit before you need it, 2) Set aside an emergency credit card, 3) Take advantage for available lending options (SBA as mentioned in these other articles—physical disaster loans, economic disaster loans), 4) Keep your business and personal credit in good shape, 5) Start building an emergency fund—credit is not a cure-all.

For more detail of these steps, read here: <https://wellsfargoworks.com/credit/article/using-credit-to-weather-disruption>



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