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A Planning Framework for an Enterprise Response to COVID-19

The government-enforced closures and social distancing measures introduced to combat the COVID-19 crisis have revealed risks and weaknesses for which many organizations were ill prepared. Some have faced financial ruin. Others resuming their operations will face significant and disruptive changes. Are you ready? This article presents a framework to help organizations plan for their post-COVID restart and to better prepare the organization to weather future disruptions.

The not-for-profit organization with property, facilities, and programs (where I sit as a member of the management board) was hit full on by the COVID-19 crisis and associated business restrictions. For this organization, bookings for accommodations and programs dried up, food services lost their clients, revenues dropped to near zero, and service offerings required significant re-thinking in order to respond to the crisis.

Like every organization affected by the COVID-19 pandemic, we needed a set of tools to guide the planning of our enterprise response to the crisis. A search for enter-

prise planning guidelines during a pandemic yielded an instruction to “begin rapid planning” and little else. Drawing from my work in planning facilitation and project and program management, and borrowing from other scant resources, I put together a framework for my management team that may also help other organizations ensure their response to COVID-19 is focused, planned and well-managed.

An enterprise-wide, structured approach to response planning starts with a concise mission statement that provides a clear understanding of the objective. The mission statement reflects the need to plan, manage

and execute the adjustments necessary to respond to the COVID-19 crisis and to minimize business and epidemiological risk.

I reworked the Respond, Restore and Restart (3R) approach to managing an organizational response to COVID-19 presented by Dr. Bandar Hajjar of the Islamic Development Bank¹ to further define the execution approach within the mission statement. The 3R approach (see Fig. 1) for an enterprise initiative for COVID-19 includes:

- Respond actions to minimize risk to people and the organization by strengthening systems to reduce infection and transmission risks;
- Restore activities to reinstate the continuity of inputs to business processes, including staffing and supply chain restoration;
- Restart activities to support work efforts as the organization exits from COVID-19 related government restrictions. The restart work is likely to occur in phases as restrictions are gradually removed.



Fig. 1 — The 3R Approach.

In my organization we call this the “3R Initiative” to indicate to staff and management that the program covers all activities to get the enterprise safely back in full operation.

The first step under the framework is the development of an enterprise level view of the work that must be performed in the 3R Initiative, which is informed by the Enter-

prise Portfolio Map (see Fig. 2). Similar to a work breakdown structure (WBS), the portfolio map identifies the entirety of all the functions, operations, programs and work that goes on within an enterprise. In my case, we were fortunate in that we had previously updated the portfolio map to several levels of detail and about one hundred elements, in a workshop session some months before the pandemic, giving us a head start on the scope definition for the 3R Initiative. The portfolio map shown in Fig. 2 has been rolled up to the top level for clarity. The scope definition process starts with a top-down executive-level approach, looking at the elements of the enterprise portfolio map and brainstorming to identify deliverables or work in each of the 3R components for each element in the portfolio. In some cases, examining the scope of work may identify significant changes to the elements and the manner in which work is performed within the organization. Glass-half-full individuals may look at the crisis as an opportunity to make the changes they always wanted but until now were not sufficiently incentivized to undertake.

The scope of work definition is further informed by a risk assessment process on the major elements of the enterprise portfolio map. Two key questions asked during this assessment process are about probability and impact:

1. What is the likelihood that we will have problems in any of the Respond, Restore or Restart activities, and
2. If we have problems with our Respond, Restore or Restart activities, how bad will it be?

The risk discussion quickly leads to the team focusing on questions such as “If we don’t get this right, how will that affect the

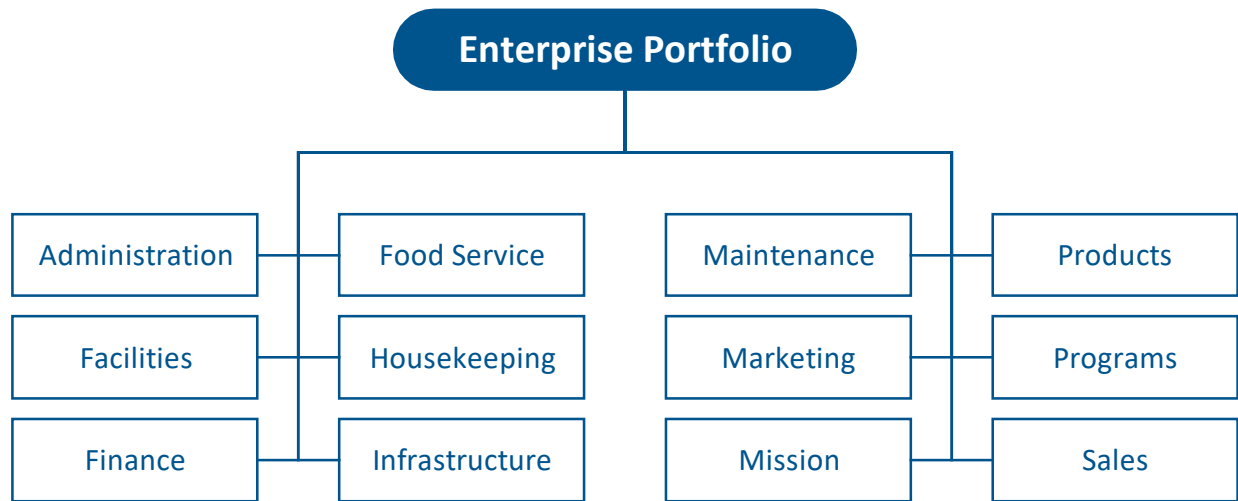


Fig. 2 — An Enterprise Portfolio Map showing only Level 1 elements.

infection risks?” Analysis of the assessment data can be presented as a Risk Profile Chart (see Fig. 3) that highlights the areas within the portfolio where associated risks are the greatest.

The enterprise portfolio risk identification process is largely focused on the so-called ‘hard’ risk elements – those that can be managed by policy, process, structure and equipment adjustments. We also incorporated a refined ‘soft’ risk assessment tool based on the Software Engineering Institute’s *Frame-*

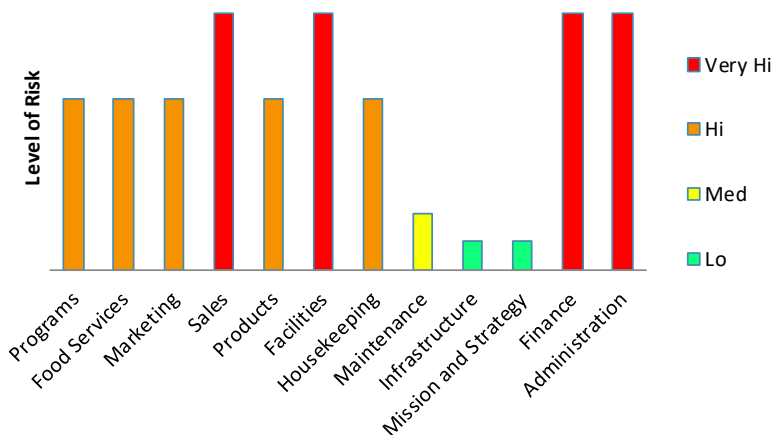


Fig. 3 — Risk Profile Chart.

work for Categorizing Key Drivers of Risk². The ‘soft’ risk assessment focused on human and cultural factors that may need to be managed in order to increase the success of the initiative. Both hard and soft risks require constant vigilance and monitoring throughout the life of the initiative.

After high level scope items were identified, we handed further scope refinement work to teams. Scope elements were developed or refined based on public health requirements, advisories, policies, regulations, guidelines and standards. After scope definition was complete, we estimated, resourced and sequenced the work, ultimately resulting in a detailed plan for the execution.

When we first realized the impact of COVID-19 on our normal operations, the challenge seemed immense. The framework’s structured approach serves as a solid guide to the conversations, responses and plans that can carry us through this crisis.

The Enterprise Portfolio Map

Planning under the 3R framework starts with a comprehensive view of all the work that is performed across the organization using the Enterprise Portfolio Map. This all-encompassing perspective ensures that every element is evaluated and addressed within the initiative. Here are some examples of enterprise response planning, with and without the structure provided by the framework.

Challenges and Opportunities in the Supply Chain

For our not-for-profit organization, the framework's enterprise-level view of work and structured approach to risk assessment helped identify supply chain weaknesses and sourcing opportunities. A reliance on food suppliers who were unable to deliver in the pandemic environment led us to search for alternate or better approaches. Our founding benefactor had long dreamed that part of our property would be used as a demonstration farm, in harmony with the environment. This was the opportunity we needed to put into place some components of that dream. We have begun to reduce our reliance on



outside vendors. Vertical integration in our context means expanding our gardens to supply a higher portion of vegetables and herbs for our kitchen, the introduction of egg-laying hens, and the addition of foraged foods. Under the direction of a local foraging expert and our adventurous chef, we have added leeks, mushrooms, fiddleheads, wild grapes, berries and edible flowers to our menu. Additionally, we are embarking on initiatives to increase our partnerships with local growers who share our environmental passion and who have demonstrated resilience through the crisis.

Restaurant Response Planning Goes Wrong

I recently encountered a restaurant management team that tried to negotiate their response and restart planning but missed a major component when they skipped the use of the Enterprise Portfolio Map. In my organization's portfolio map, the administration element includes safety meetings and staff training, while the facilities element includes the rooms and equipment for these meetings and training sessions. Even without the Enterprise Portfolio Map, the restaurant management team recognized the need for staff training and safety meetings to upgrade skills and knowledge associated with COVID-19 risks; unfortunately, the training and meetings were held in the tight confines of the restaurant



booths, disregarding the advisories on physical distancing and exposing staff to unnecessary risks. The framework is not a guarantee against mistakes, but it tightens gaps in the planning process. By using the framework, management may have performed a quick risk assessment of the facilities for meetings and training, raising a cautionary flag.

Structure for Fitness Studio Response Planning

A boutique fitness studio demonstrated a good application of the framework's full enterprise perspective using the Enterprise Portfolio Map in planning their response to COVID-19. Before the pandemic, the studio was about to embark on a facilities upgrade, including purchasing cabinetry from a local retailer. The renovation, a key element for 2020 on their Enterprise Portfolio Map was quickly put on hold as their supplies were cut off under the government-mandated closure of brick and mortar retail outlets.



From the finance element of the EPM, the team identified the negative impact of the studio closure on revenues and, under the program element, a new online virtual fitness program was proposed to create a new revenue stream. The team identified supporting activities including a marketing campaign, video chat capabilities (under the facilities and equipment element), technology training and re-assignment of staff (under the staffing and development element) and new billing codes and processes (under administration). Risks including COVID-19 infection risks, business risks, and 'soft' risks like concerns about effective communications while implementing the new program were identified, ranked and addressed. The team developed and executed detailed plans leading to the rollout of the new online program.

This is only an early phase of the 3R Respond, Restore, and Restart initiative for the fitness studio. As government restrictions are slowly lifted, the team will look at the 3Rs and evolve their response to the COVID-19 crisis. Physical distancing measures will be put in place in response to health advisories. Eventually, marketing, staffing and administration components will be restored. In-studio programs will be gradually restarted. And, with curbside pickup now permitted, the staff is once again dreaming of the flair the renovations will be bringing to the studio.

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