



HR Crisis Playbook
A Complete Guide to Managing HR Emergencies
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Crisis Prevention & Early Warning Signs {#crisis-prevention}



Immediate Action Required:

- **Multiple complaints about same manager/issue** - Pattern indicates systemic problem
- **Sudden spike in turnover** - 20%+ increase in departures within 30 days
- **Anonymous tips or whistleblower reports** - Someone feels unsafe using normal channels
- **Social media complaints about workplace** - Public relations risk escalating
- **Union organizing activity detected** - Flyers, meetings, employee discussions



Monitor Closely:

- **Increase in sick leave usage** - May indicate stress, harassment, or toxic environment
- **Drop in employee engagement scores** - Early indicator of larger issues
- **More grievances or HR complaints** - Trend showing deteriorating conditions
- **Key employee resignations** - Loss of institutional knowledge and stability
- **Customer complaints about service** - May reflect internal employee issues

Monthly Crisis Prevention Checklist

Week 1: Employee Pulse Check

- ☐ Review turnover data and exit interview themes
- ☐ Check anonymous feedback channels (suggestion boxes, surveys)
- ☐ Monitor employee engagement metrics
- ☐ Review sick leave and attendance patterns

Week 2: Management Assessment

- ☐ Review management training completion rates
- ☐ Check for consistent policy enforcement across departments
- ☐ Assess span of control (managers with too many direct reports)
- ☐ Review performance management documentation

Week 3: Compliance Audit

- ☐ Review recent policy updates and communication
- ☐ Check I-9 documentation and employment verification
- ☐ Assess workplace safety incident reports
- ☐ Review wage and hour compliance

Week 4: Risk Assessment

- ☐ Update emergency contact information
- ☐ Review crisis response procedures with leadership team
- ☐ Assess legal and insurance coverage
- ☐ Plan preventive training for next month





Documentation Best Practices

Essential Documentation Standards:

- **Contemporaneous notes** - Document incidents when they happen, not days later
- **Factual, not interpretive** - Write what happened, not why you think it happened
- **Complete contact information** - Names, dates, times, witnesses present
- **Secure storage** - Confidential files in locked cabinets or encrypted digital storage

Documentation Template for Incidents:

Date: _____

Time: _____

Incident Type: _____

Location: _____

People Involved:

Witnesses:

Description of Events:

Immediate Actions Taken:

Follow-up Required:



Reported By: _____ Date Reported: _____



Immediate Crisis Response Framework {#crisis-response}

First 24 Hours Action Plan

Hour 1: Immediate Assessment (Within 60 minutes)

1. **Secure the scene** - Ensure immediate safety of all employees
2. **Gather initial facts** - Who, what, when, where (not why yet)
3. **Notify key personnel** - CEO, legal counsel, insurance carrier if needed
4. **Document everything** - Start incident report immediately
5. **Separate involved parties** - Prevent further incidents or influence

Hours 2-4: Initial Response

1. **Contact legal counsel** - Get preliminary guidance on investigation scope
2. **Preserve evidence** - Secure documents, emails, video footage
3. **Interview key witnesses** - Get statements while memories are fresh
4. **Implement interim measures** - Suspension, policy reminders, increased supervision
5. **Prepare initial communication** - What to tell other employees

Hours 4-24: Systematic Response

1. **Develop investigation plan** - Timeline, scope, responsibilities
2. **Set up communication protocol** - Who speaks to whom about what
3. **Review relevant policies** - Ensure response aligns with company procedures
4. **Contact insurance carriers** - Workers comp, liability, EPLI as appropriate
5. **Plan next day actions** - Investigation schedule, employee communication

Crisis Decision Tree

Is there immediate physical danger? → YES: Call 911, secure area, evacuate if necessary → NO: Proceed to assessment

Is this a potential legal violation? → YES: Contact legal counsel immediately → NO: Proceed with internal investigation

Could this become public/media attention? → YES: Notify communications/PR team → NO: Continue with standard protocols

Are multiple employees affected? → YES: Plan broader communication strategy → NO: Focus on individual incident management



Who to Call Emergency Contacts

Legal Issues:

- Employment attorney: _____
- General counsel: _____
- Legal hotline: _____

Safety/Medical:

- Emergency services: 911
- Company physician: _____
- Workers comp carrier: _____

Insurance/Risk:

- General liability: _____
- EPLI carrier: _____
- Risk management: _____

Internal Escalation:

- CEO/President: _____
 - Board chair (if needed): _____
 - HR leadership: _____
-



Investigation Procedures {#investigation}

Investigation Planning Checklist

Before You Start:

- ☐ Define scope of investigation (what allegations, what timeframe)
- ☐ Identify all potential witnesses and evidence sources
- ☐ Determine who will conduct investigation (internal vs. external)
- ☐ Establish timeline for completion
- ☐ Prepare standard interview questions
- ☐ Set up secure documentation system

Evidence Collection:

- ☐ Email records and electronic communications
- ☐ Personnel files for all involved parties
- ☐ Relevant policies and procedures
- ☐ Security camera footage (preserve immediately)
- ☐ Physical evidence (photographs, documents)
- ☐ Prior complaints or incidents involving same parties

Interview Best Practices

Interview Preparation:

- Schedule in private, neutral location
- Allow adequate time (1-2 hours minimum)
- Have witness present for serious allegations
- Prepare open-ended questions in advance
- Review relevant policies beforehand

Interview Structure:

- 1. Opening (5 minutes)**
 - Explain purpose and process
 - Emphasize confidentiality and no retaliation
 - Ask for honest, complete information
- 2. Fact Gathering (45-90 minutes)**
 - Use open-ended questions first
 - Get chronological narrative
 - Ask for specific details and context
 - Request names of potential witnesses
- 3. Follow-up Questions (15-30 minutes)**
 - Clarify inconsistencies
 - Ask about company policies
 - Inquire about prior incidents





- o Request additional evidence
- 4. **Closing (5 minutes)**
 - o Summarize key points
 - o Ask if anything was missed
 - o Explain next steps and timeline
 - o Remind about no retaliation policy

Sample Interview Questions:

Opening Questions:

- "Can you tell me in your own words what happened?"
- "When did this incident occur?"
- "Who else was present or might have witnessed this?"

Detail Questions:

- "What specifically did [person] say/do?"
- "How did you respond?"
- "Has anything like this happened before?"
- "Did you report this to anyone else?"

Policy Questions:

- "Are you familiar with our harassment policy?"
- "Do you feel comfortable reporting workplace concerns?"
- "Have you received training on this topic?"

Investigation Documentation Template

Investigation Report Outline:

1. **Executive Summary**
 - o Key allegations
 - o Investigation methodology
 - o Conclusions and recommendations
2. **Background**
 - o Parties involved
 - o Timeline of events
 - o Relevant policies
3. **Investigation Process**
 - o Evidence collected
 - o Witnesses interviewed
 - o Timeline of investigation
4. **Findings**
 - o Facts established
 - o Credibility assessments





- o Policy violations identified
5. **Recommendations**
- o Disciplinary actions
 - o Policy changes needed
 - o Training requirements
 - o Monitoring procedures
-



Communication Management {#communication}

Crisis Communication Principles

The 4 C's of Crisis Communication:

1. **Clear** - Simple, direct language everyone can understand
2. **Consistent** - Same message from all leadership sources
3. **Credible** - Honest about what you know and don't know
4. **Compassionate** - Show concern for those affected

Internal Communication Templates

Initial Employee Communication (Day 1):

Subject: Important Workplace Matter

Team,

I want to inform you that we are currently investigating a workplace concern that was brought to our attention. While I cannot share specific details due to confidentiality requirements, I want to assure you that:

- We take all workplace concerns seriously
- We are conducting a thorough and fair investigation
- All employees are expected to cooperate fully
- Retaliation against anyone involved in this process is strictly prohibited

If you have information relevant to this matter or have concerns of your own, please contact [contact person] immediately.

Thank you for your cooperation and continued professionalism.

[Leadership Name]

Investigation Update Communication:

Subject: Update on Workplace Investigation



Team,

I want to provide you with an update on the workplace investigation I mentioned previously. The investigation is ongoing and we expect to conclude it by [date].

During this time:

- Normal business operations continue
- All employees should maintain professional conduct
- Questions or concerns should be directed to [contact]
- Confidentiality must be maintained by all parties

We appreciate your patience as we work through this matter thoroughly and fairly.

[Leadership Name]

Investigation Conclusion Communication:

Subject: Resolution of Workplace Investigation

Team,

I want to inform you that we have concluded our investigation into the workplace matter I previously communicated. Based on our findings, we have taken appropriate action in accordance with our policies.

While I cannot share specific details due to confidentiality requirements, I can assure you that:

- The investigation was thorough and impartial
- Appropriate corrective measures have been implemented
- We remain committed to maintaining a respectful workplace

If you have ongoing concerns, please don't hesitate to reach out to [contact].

Thank you for your professionalism throughout this process.

[Leadership Name]

Legal & Compliance Considerations {#legal}

When to Contact Legal Counsel Immediately



Always Call Your Attorney For:

- Sexual harassment allegations
- Discrimination complaints (race, gender, age, disability, etc.)
- Workplace violence or threats
- Potential wrongful termination claims
- Wage and hour violations
- Safety incidents with potential OSHA violations
- Union organizing activities
- Whistleblower complaints
- Any incident involving executives or board members

EEOC Compliance Checklist

If You Receive an EEOC Charge:

- ☐ Don't panic - you have time to respond (typically 30 days)
- ☐ Contact legal counsel immediately
- ☐ Preserve all relevant documents
- ☐ Conduct internal investigation if not already done
- ☐ Prepare position statement with legal counsel
- ☐ Consider mediation opportunities
- ☐ Document all costs associated with the charge

Prevention Strategies:

- ☐ Regular anti-harassment training for all employees
- ☐ Clear, well-communicated complaint procedures
- ☐ Prompt investigation of all complaints
- ☐ Consistent enforcement of policies
- ☐ Documentation of all personnel decisions

Workers' Compensation Considerations

Immediate Steps for Workplace Injuries:

1. **Provide immediate medical attention**
2. **Report to workers' comp carrier within 24 hours**
3. **Complete incident report immediately**
4. **Gather witness statements**
5. **Preserve accident scene/equipment**
6. **Follow up with injured employee**
7. **Coordinate return-to-work programs**

OSHA Compliance

Reportable Incidents (Call OSHA within 8 hours):

- Workplace fatalities





- Hospitalizations of 3+ employees
- Amputations
- Loss of an eye

Investigation Requirements:

- Preserve accident scene until OSHA arrives
- Don't move equipment unless safety requires it
- Gather all relevant documentation
- Coordinate with legal counsel
- Prepare for potential inspection

Crisis Recovery & Process Improvement {#recovery}

Post-Crisis Assessment

Within 30 Days of Crisis Resolution:

- ☐ Conduct lessons learned session with leadership team
- ☐ Review effectiveness of crisis response procedures
- ☐ Assess employee morale and trust levels
- ☐ Evaluate communication effectiveness
- ☐ Identify policy or training gaps
- ☐ Document improvements needed

Rebuilding Trust with Employees

Immediate Actions (First 30 Days):

1. **Acknowledge the impact** - Don't minimize what happened
2. **Communicate changes made** - Show concrete improvements
3. **Increase leadership visibility** - More town halls, open doors
4. **Implement feedback mechanisms** - Anonymous surveys, suggestion boxes
5. **Provide additional training** - Address root causes identified

Ongoing Efforts (3-6 Months):

1. **Regular pulse surveys** - Monitor employee sentiment
2. **Focus groups** - Get deeper feedback on workplace culture
3. **Leadership coaching** - Improve management effectiveness
4. **Policy updates** - Strengthen procedures based on lessons learned
5. **Celebration of improvements** - Recognize positive changes

Process Improvement Framework

Policy Review and Updates:

- Review all policies related to the crisis
- Update language for clarity and completeness
- Ensure procedures are realistic and actionable





- Add examples and scenarios for better understanding
- Train all managers on policy changes

Training Program Enhancements:

- Develop scenario-based training modules
- Include crisis-specific training for managers
- Create refresher training schedules
- Implement new employee orientation updates
- Establish ongoing competency assessments

Monitoring and Prevention:

- Establish early warning metrics
 - Create regular reporting dashboards
 - Implement management check-ins
 - Schedule quarterly risk assessments
 - Plan annual policy and procedure reviews
-



Emergency Contact Templates {#templates}

Legal Counsel Contact Information

Primary Employment Attorney:

- Name: _____
- Firm: _____
- Phone: _____
- Email: _____
- After-hours contact: _____

General Counsel/Corporate Attorney:

- Name: _____
- Firm: _____
- Phone: _____
- Email: _____

Legal Hotline (if available):

- Service: _____
- Phone: _____
- Account #: _____

Insurance Carriers

Employment Practices Liability Insurance (EPLI):

- Carrier: _____
- Policy #: _____
- Claims phone: _____
- Contact person: _____

General Liability:

- Carrier: _____
- Policy #: _____
- Claims phone: _____

Workers' Compensation:

- Carrier: _____
- Policy #: _____
- Claims phone: _____
- Contact person: _____

External Resources

Employee Assistance Program (EAP):

- Provider: _____
- Phone: _____
- Website: _____





Investigative Services:

- Company: _____
- Contact: _____
- Phone: _____

Crisis Communications/PR:

- Firm: _____
 - Contact: _____
 - Phone: _____
-



Crisis Documentation Checklist {#documentation}

Essential Documents to Preserve

Immediately Secure:

- ☐ All email communications related to incident
- ☐ Personnel files for all involved parties
- ☐ Security camera footage (before it's overwritten)
- ☐ Any physical evidence
- ☐ Witness contact information
- ☐ Previous complaints or incidents involving same parties

During Investigation:

- ☐ All interview notes and recordings
- ☐ Timeline of events
- ☐ Evidence collection log
- ☐ Legal counsel communications
- ☐ Insurance notifications

Post-Investigation:

- ☐ Final investigation report
- ☐ Disciplinary action documentation
- ☐ Employee communications
- ☐ Training records
- ☐ Policy updates implemented

Document Retention Guidelines

Personnel Files: 7 years after termination **Investigation Files:** 7 years minimum

Training Records: 3 years minimum **Safety Incidents:** 5 years minimum **EEOC**

Charges: Until final resolution + 7 years

Confidentiality and Access

Who Can Access Investigation Files:

- HR leadership
- Legal counsel
- CEO/designated executive
- External investigators (as needed)

Confidentiality Requirements:

- All documents marked "CONFIDENTIAL"
- Access log maintained for all file reviews
- No copying without authorization
- Secure storage (locked files/encrypted digital)





Quick Reference Crisis Contacts

EMERGENCY (Physical Danger): 911

Mickie Murrell - Crisis HR Support:

- Phone/Text: (937) 397-3428
- Email: mickie.murrell@yahoo.com
- Emergency response within 2 hours

Legal Issues:

- Employment Attorney: [Your attorney info]
- EEOC Hotline: 1-800-669-4000

Insurance Claims:

- Workers Comp: [Your carrier]
- EPLI: [Your carrier]
- General Liability: [Your carrier]

This playbook is designed to provide general guidance and should be customized for your specific organization and industry. Always consult with qualified legal counsel for situation-specific advice.

@ 2025 Mickie Murrell - Strategic Fractional HR Leadership *For questions or emergency HR support: (937) 397-3428*