



WHEN THE UNTHINKABLE HAPPENS

Contingency Planning for the
People Problems You Never
See Coming

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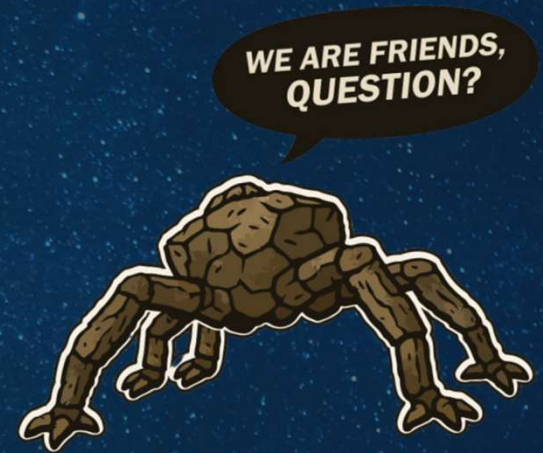


About Me

- PA > CO > FL > SC > NC
- Running
- Finding good gluten free food
- Reading / listening to audiobooks

Work Experience

- 3yrs Higher Ed - Masters in Leadership + Edu
- 9yrs in SaaS (sales/support/onboarding/cust edu/operations)
- 1yr at Relentless Solutions w Jim-Barry





Agenda



- Navigating the Unknown
 - TRIGGER WARNING for: TBI, Psychosis, stolen elections
- What we *can* do to prepare for the unexpected
- Practical ways to support your team in crisis
- Questions

Quick audience check

Raise your hand if...

- Only one person knows how to do something critical on your team
- Billing or employee pay stops if a specific person is out
- You aren't sure if all critical SOPs are up to date
- A client relationship relies on one specific person



NAVIGATING THE UNKNOWN



UNKNOWN = UNTHINKABLES

BAD
BAD
BAD

HEALTH

- Physical injury
- Mental health crisis
- Both
 - Caretaker

EXTERNAL FACTORS

- Worldly chaos impacting your people

INTERNAL FACTORS

- Internal chaos impacting your business



HEALTH UNTHINKABLE SITUATIONS

BAD
BAD
BAD



Broken Spine + Concussion

- **Only CSM in a very new role**
- **1 week > 5 weeks**

Bipolar psychosis

- **Director of AV solutions, onsite when psychosis started**
- **6 months > early retirement**

Traumatic Brain Injury

- **Managed North America Support teams at SaaS company**
- **Hospitalized 3 weeks, out 3 months**

EXTERNAL FACTORS UNEXPECTED SITUATIONS



- Belarusian presidential election on August 9th, 2020. It was widely believed by international observers to have been a rigged election.
- Afterwards many protested
 - Police brutality: 6 reported deaths and 450 UN-documented cases of torture.
- Founder of PandaDoc (from Belarus) had recently become a leading voice in the movement.
 - He set up an initiative, offering financial aid and re-training of Belarusian police officers in the tech industry for any who had decided to disobey orders to beat and torture protesters.
 - **The platform had received more than 6,000 messages and almost 600 requests for help (20 days after the election).**

EXTERNAL FACTORS

UNEXPECTED SITUATIONS

Less than a month after the election (Sept 4th) the PandaDoc office was raided. **Four employees were taken into custody; including our Product Director, Head of HR, Chief Accountant, and another director.**

Head of HR was the only person who could initiate pay for that entire Belarus office (100+ staff) and the Head of Product was held as a political prisoner for a full year.



BAD
BAD
BAD

MALICIOUS UNEXPECTED SITUATIONS



BAD
BAD
BAD

Project came in for a customized integration.
The assigned solution architect asked around, did anyone know Ruby?

When no one did, he used Ruby for the solution. Got it to 95% completion, then asked for a raise and leveraged the project.

He did not get the raise.

The company had to redo the customer project and eat the additional cost.



Audience check

Do you have an
unthinkable situation
that's happened to
share?

No HIPAA Violations



WHAT WE CAN DO TO PREPARE FOR THE UNEXPECTED

"You were unsuspectin', not unwarned"



THE PATTERNS

These stories look different... but the failure pattern is the same:

- Knowledge locked with one person
- Secure access / credentials not shared
- No defined backup
- No standard documentation
- No customer communication plan

BAD
BAD
BAD



SPOF RADAR

SINGLE POINT OF FAILURE

Brainstorm: What must happen every week and/or month for the MSP (company) to operate?

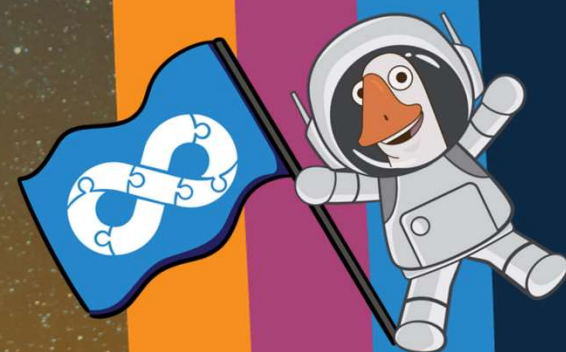
- Service Desk & Escalations
- Client communications & approvals
- Billing, payroll, & collections
- Vendor ordering & licensing
- Onboarding/offboarding
- Security & access management
- Key client check-ins & projects
- Sales pipeline / quoting
- Backups & alert monitoring

SPOF RADAR

SINGLE POINT OF FAILURE

Once you have your final list, score each function 1-5 (5 = high risk):

- Only one person can do it
- No written process
- No backup trained
- Credentials not centralized
- High frequency / high impact



OWNER + BACKUPS

Every critical role gets an owner and named backup

“Two-person rule” for all essential functions:

- billing
- payroll
- vendor portals
- security admin
- client escalations

Use **role-based accounts** wherever possible.

Framework: "Minimum Viable Documentation" (MVD)

MVD = enough documentation that a backup can succeed

Establish what your critical processes must include:

- Purpose (why it exists)
- Cadence/Trigger (when it happens)
- Tools/access needed
- Step-by-step (bullet list)
- Any decision trees outlined ("if X, then Y")
- Expected output (what "done" looks like)
- Time estimate + pitfalls
- Owner + backup + where it lives

SMART
SMART
SMART



ACCESS & CREDENTIALS

Credential Continuity Checklist:

- MFA enabled
- Admin accounts not tied to personal email
- Password manager with shared vaults
- Domain/DNS registrar has 2+ admins
- Billing systems have 2+ admins
- Ticketing/PSA has role-based groups

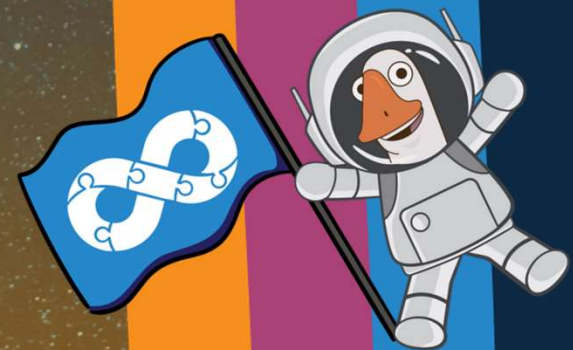
GOOD
GOOD
GOOD



CUSTOMER CONFIDENCE DURING “PEOPLE INCIDENTS”

Communication Framework: CALM

- **C**ontext: what’s happening (brief, no drama)
- **A**ction: what we’re doing right now
- **L**evel-set: what changes for them (if anything)
- **M**eeet the moment: how to reach you + next update time



Audience check



Do you have practical
ways to eliminate SP0F
bottlenecks?



PRACTICAL WAYS TO SUPPORT YOUR PEOPLE



30-DAY CONTINUITY SPRINT PLAN

Bring this plan to life without overloading your team.

Week 1

Identify top 10
SPOFs

Week 2

Document top
5 processes
(MVD)

Week 3

Assign
backups

Ensure they
are trained

Week 4

Credential
Audit

Customer
templates

When a Crisis Occurs

- **Have high empathy for any injured (non-malicious) employee**
 - Send get well gift from company (flowers, uber eats, Instacart, massage gift cards)
 - Remind them they are valued and deserve adequate time to rest
- **When they are off, allow them to be off. No work asks.**
- **Don't wait for a crisis to know how to use or administer benefits**
- **Don't make the team guess what's happening - only feeds the rumor mill. Have a HIPAA safe statement.**
- **Offer support for colleagues impacted by trauma**
 - Bring in counseling if severe / colleague passes away
- **Follow up with customers who interact with them**

TAKE 3 MIN

Write down 3-5 action items for you to do next week

- Implement 30-Day Continuity Sprint Plan
- Add SPOF brainstorm to your next team agenda
- Brainstorm your personal processes that are not documented
- Ask HR about your STD/LTD benefit options
- Evaluate centralized documentation tool / central KB options
- Buy a helmet
- Join a MSPGeekCon Volunteer committee



QUESTIONS?

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FANATICS



ENTHUSIASTS



ADVOCATES



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THANK
THANK
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