MANAGING YOUR ORGANISATION SUCCESSFULLY DURING COVID-19

A practical, collaborative and organic approach to help entrepreneurs, small and medium businesses, organisations and NGOs survive the COVID-19 crisis.

Join the initiative!
Write us at info@globalcad.org to learn more.
The world as we know it has changed. In a matter of weeks we went from living our normal lives to being confined to our houses, isolated from our friends and family. Beyond the impact of COVID-19 on us as individuals, the measures being imposed to stop the spread of the virus have taken a huge toll on our economic activity.

This document is our humble way to try and contribute to small and medium businesses and entrepreneurs, organisations and NGOs who are facing an unprecedented change to their operations. We offer our expertise in consulting services and will put our methodologies to use to assist those businesses not only to survive the crisis, but to learn from it and adapt, hopefully getting to the other side having established more sustainable and resilient practices.

Are an entrepreneur, own a small or medium business, or are a team leader working at a foundation or NGO and are suddenly facing drastic changes in your ways of working and in the way you connect with your clients. You have many questions in terms of how to manage your business in an effective, sustainable way during COVID-19.

GlobalCAD is a consultancy firm with offices in Barcelona, Berlin, Mexico and Washington and with clients and collaborators all over the world. Working remotely is our usual way to operate and we have developed successful processes and incorporated tools to help us do so. We provide consultancy services that include SMEs and social entrepreneurship management and training to top tier clients all over the world.

ADAPTING YOUR ORGANISATION DURING COVID-19

We want to help. We propose to do it by applying the tools and methodologies we have used in dozens of projects and by using our experience leading remote teams and client relationships to support small businesses that lack such expertise. Here's what we can offer:

GLOBALCAD’S COVID METHODOLOGICAL ACTION PLAN: A FOUR STEP PLAN TO ENABLE A QUICK BUSINESS RESPONSE DURING THE COVID-19 OUTBREAK, WHILE MAKING IT MORE RESILIENT, SUSTAINABLE AND EFFECTIVE IN THE LONG RUN

1. UNDERSTAND
   Self-Diagnosis
   Evaluate how you are doing / what you need

2. PLAN
   Access Toolkit
   Review available tools.
   Define what works for you

3. ACT
   Develop Action Plan
   Design a short & mid term Action Plan and Road Map

4. CONNECT
   Reach out to the Ecosystem
   Connect with the Ecosystem and interact to support

- GlobalCAD Self-Assessment tool for COVID-19
- COVID-19 checklist Do’s and Don’ts
- BAT managing through COVID-19
- Strategic Action Plan Framework
- Roadmap Design Guidelines
- Online Mentoring Assistance Program
- Partnership 7 Step Framework
- Communication Strategic Outreach
No business is the same and there is no common response to the challenges from COVID-19. For that reason, we invite you to take this brief survey (it will take you only 8 minutes) that will help you assess what are the biggest challenges you are facing now and will face in the near future and what are your most valuable assets to be leveraged during the COVID-19 crisis.

After you take the survey, we will follow up and check how we can help you and your business address the challenges and potentialise the assets to get through the crisis. You can move forward independently, using this self diagnosis tool to help you assess your particular business needs and follow steps 2 through 4 in this document to help you organise your business and adjust your operations to COVID-19 times. Or you can get online mentoring from GlobalCAD’s experts - we will help you with management, organisation and strategic challenges that you might be facing during this crisis. We will provide this service pro bono.

GLOBALCAD’S SELF DIAGNOSIS TOOL

We invite you to take this 8-minute survey to assess your particular business needs, challenges and potentials:

HTTPS://WWW.SURVEYMONKEY.COM/R/LJ85PGD
Below is a series of Do's and Don’t's to help you better manage the adaptation phase to COVID-19 from a Health Perspective (Protect & Prevent); a Logistics Perspective (Plan & Be Creative); an Economic Perspective (Adapt & Be Proactive); and a Corporate Management Perspective (Adjust & Plan Ahead):

### HEALTH PERSPECTIVE: PROTECT & PREVENT

<table>
<thead>
<tr>
<th>DO</th>
<th>DON'T</th>
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<tbody>
<tr>
<td>Do follow rules and advice from authorities and strictly protect yourself, your staff, clients and partners from any potential health risk.</td>
<td>Don’t take unnecessary risks such as leaving home to have access to non-essential goods or services.</td>
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<tr>
<td>Do stay informed about the situation as events and recommendations are rapidly evolving. Credible resources include the Center for Disease Control and the World Health Organisation.</td>
<td>Don’t promote or distribute fake news about COVID-19.</td>
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<tr>
<td>Do participate in “social distancing” to blunt the spread of the virus. Let’s NOT be social – the virus doesn't spread itself… people spread it! Now is the time to stay home to “flatten that curve”.</td>
<td>Don’t touch your eyes, nose, mouth or face without washing your hands.</td>
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<tr>
<td>Do begin buying a 60-90 day supply of basic products (including medication, if needed). The purpose of doing this is not because we are going to “run out” of things, but because we want to avoid going to crowded public spaces.</td>
<td>Don’t treat “social distancing” like a &quot;vacation&quot;. This is not the time to run errands or go to the mountains. It is important to stay home and stay away from others for this to work. Do talk to your teenage/adolescent kids about it.</td>
</tr>
<tr>
<td>Do buy a 4-week supply of food and household products and cleaning products in case we are in a situation where social isolation or quarantine is necessary.</td>
<td>Don’t shake hands or give hugs as greetings. Use an alternative greeting that maintains 6-8 feet of distance.</td>
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<tr>
<td>Do protect your immune system by getting your vaccinations, eating a balanced diet, avoiding too much alcohol, getting enough sleep and maintaining a healthy weight. If you may be vitamin deficient, you can consider supplementation of Vitamin C at normal daily doses.</td>
<td>Don’t visit your older relatives or community members, as they are the highest risk group.</td>
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<td>Do help out a neighbour who may be in need for having mobility problems and can’t go out to stock up on their own.</td>
<td>Don’t go to public places like gyms, theaters, restaurants.</td>
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<tr>
<td>Try to keep active doing physical activities as time and space permits. Exercising is key to maintain a good mental health, particularly in times of stress.</td>
<td>Don’t panic – It is not a ‘panic-demic’ but don’t take this lightly either, especially if you are healthy! Emotional contagion is the spread of fear or panic and it is more contagious than the virus itself.</td>
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### ECONOMIC PERSPECTIVE: ADAPT & BE PROACTIVE

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<tr>
<td>Do identify and cut all non-essential costs and expenses.</td>
<td>Don’t focus too much on short-term results or direct bottom line. It’s time to plan for the mid-term and make costs projections.</td>
</tr>
<tr>
<td>Do calculate your cashflow assets and requirements and consider how long you can operate with current economic resources.</td>
<td>Don’t stop tracking KPIs or core economic indicators. It is important to readjust but not to stop measuring progress.</td>
</tr>
<tr>
<td>Do inform yourself of what are the lines of credit offered by local banks (low interest credits/loans, etc.) and consider applying if needed.</td>
<td>Don’t borrow or finance yourself in excess. Calculate thoroughly what you need and ensure financial stability but don’t over in-debt your organisation unnecessarily.</td>
</tr>
<tr>
<td>Do identify and apply for economic support measures from national, regional and/or local authorities (temporary staff reduction, tax delays/breaks, etc.).</td>
<td>Don’t seek own business advantages from the pandemic COVID-19 (e.g. price increases for essential items, services, etc.) but treat this as a time of more solidarity, not more competition.</td>
</tr>
<tr>
<td>Do renegotiate rent and all possible structural costs with landlord and suppliers.</td>
<td>Don’t spare too much on investments to update the technological capacities of yourself/your team to work from home.</td>
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<tr>
<td>Do re-plan your finances and plan activities that could provide short-term income (i.e consulting services, teaming up with other organisations, etc.).</td>
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**CORPORATE MANAGEMENT PERSPECTIVE:**

**ADJUST & PLAN AHEAD**

**DO**
- Do establish habits/rules for the new work situation and guide your team members with the objective to optimise communication and collaboration and avoid decrease of productivity while working from home.
- Do think digital and conduct more online meetings and fewer in-person ones.
- Do communicate the measures your company has taken to your ecosystem (working from home, hygiene measures to protect employees, partners and clients, adapted processes, etc.).
- Do incorporate the “collaboration” approach. Identify and team up with relevant organisations you can partner with to offer current and new potential services/products.
- Do keep your partners and/or customers engaged through intensified community engagement and social media activity and provide online content or services.
- Do reach out to your customers to offer services/products to be used in the near-mid term.
- Do initiate cultural change in your organisation – promoting virtual collaboration, flat hierarchies, home office, work for results, etc.
- Do re-think/re-calibrate your organisation towards a post-COVID-19 world, towards a resilient and sustainable business model and value proposition.

**DON’T**
- Don’t allow the health situation to relax among employees. Keep notifying the urgent need to be safe and responsible concerning the virus.
- Don’t treat this as a temporary situation that will go back to normal. The Post-COVID-19 world will not be the same.
- Don’t focus exclusively on current challenges and brainstorm opportunities for your organisation to diversify and generate new added value to society.
- Don’t use confinement to reduce communication among your team or with your key stakeholders.
- Don’t reduce employee’s benefits and capacity building investments. It’s time to advocate for new types of leadership that will require employee engagement.
- Don’t treat your organisation’s sustainability related initiatives as optional – they pay off in the long term.
- Don’t be conformist or resign yourself to this situation. It’s time to be proactive and position your organisation as part of the solution needed.

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**LOGISTICS PERSPECTIVE:**

**PLAN & BE CREATIVE**

**DO**
- Do establish habits/rules for the new work situation and guide your team members with the objective to optimise communication and collaboration and avoid decrease of productivity while working from home.
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- Do communicate the measures your company has taken to your ecosystem (working from home, hygiene measures to protect employees, partners and clients, adapted processes, etc.).
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- Do re-think/re-calibrate your organisation towards a post-COVID-19 world, towards a resilient and sustainable business model and value proposition.

**DON’T**
- Don’t mix personal and professional habits nor agendas.
- Don’t work from spaces at home where you spend time with family or flat mates.
- Don’t allow yourself and your team to be cut-off because of your work system and talk to your manager if it’s not working.
- Don’t get distracted with non-work interferences such as social media apps, personal calls, or texting friends.
- Don’t procrastinate and make sure you stay on top of project deadlines.
- Don’t maintain your organisation’s goals as pre-crisis: re-think your goals and evaluate what is realistic to achieve. Concentrate on the essential.
For the purpose of this guideline, we will focus on the first two: Resolve and Resilience. There are four sets of actions identified in which SMEs and start-ups can focus on currently and prepare for the transition in the long term. The four general strategies proposed are:

**GLOBALCAD’S FOUR GENERAL STRATEGIES FOR A LONG TERM TRANSITION:**

1. **Protecting & Engaging Your Employees**
2. **Re-Designing & Adapting Customer Experience**
3. **Stabilising the Supply Chain**
4. **Stabilising the Financial Situation**
1. PROTECTING & ENGAGING YOUR EMPLOYEES

Taking care of your company’s most important asset, your employees, is key to effectively navigate through the period of crisis and even more so to bounce back successfully. Their health must be protected and their needs deriving from restrictions such as closed schools must be accommodated. At the same time, their motivation needs to be maintained and their productivity and income secured. While balancing these tasks is challenging, it constitutes an opportunity to strengthen the bonds and team spirit within your workforce, which will be beneficial also in the long run.

Table 1. Strategies and areas of action for protecting and engaging with your employees:

<table>
<thead>
<tr>
<th>STRATEGY/ AREAS OF ACTION</th>
<th>KEY ACTIVITIES</th>
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<tbody>
<tr>
<td>Needs Assessment</td>
<td>• Identify and understand the needs of your employees both with respect to their work related responsibilities as well as private challenges they might be facing and jointly elaborate practicable solutions.</td>
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</tbody>
</table>
| Employees protection and engagement | • Maintain a high level of transparency and, when possible, actively involve your employees in the development of measures to respond to the crisis.  
• Develop and make use of incentives that keep your team motivated, such as more flexible schedule, recognitions among the team, and even financial incentives when the company reaches a positive cash flow. |
| Decentralised leadership  | • Reconsider and reflect on potential adjustments of your leadership towards a more horizontal and decentralised approach, e.g. introducing results based management approach.  
• Provide clear guidance, facilitate access to relevant information and ensure that communication can run smoothly and free of disruptions. |

2. RE-DESIGNING AND ADAPTING THE CUSTOMER EXPERIENCE:

More than ever, SMEs and start-ups need to navigate through market disruptions and be innovative to succeed. This includes a key process of investing in their core customer segments and anticipating their behaviour. Note that consumer demand has dramatically shifted toward online shopping for all types of goods and services. Therefore, it is suggested to focus on online customer journeys, turning this challenge into an opportunity to improve your own online presence and services. Most likely, customers’ changing preferences are not likely to go back to pre-outbreak behaviour, and businesses are only as strong as the communities of which they are a part.
Table 2. Strategies and areas of action for re-designing and adapting customer experience:

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| Business to Customer (B2C) Transparency | ● What to do internally:  
- Establish a communication protocol to inform customers about processes and changes.  
● What to do with customers:  
- Establish clear and direct communications with your customers, for example by adjusting your website and making an official announcement about changes during and after the outbreak. |
| Customer protection and loyalty | ● What to do internally:  
- Design new regulations about your distribution and delivery systems.  
● What to do with the customers:  
- Communicate your newly adopted distribution and delivery systems and make sure customers feel safe.  
- Provide incentives, discounts and other benefits.  
- Guarantee quality services and products. |
| Customer outreach | ● What to do internally:  
- Produce fact-based reports on your operations and services, and any adjustments that occur during the pandemic.  
● What to do with the customers:  
- Communicate about your business situation.  
- If possible, send official announcements to regular customers through e-mail and/or social media, keep them updated in regards to your situation, and your new offers. |
| Customer engagement | ● What to do internally:  
- Create a tool to identify current customer needs that may be covered around your product or services, for example a survey.  
- Create a customer service line to respond to their needs.  
- Create channels so customers can provide feedback and inputs to services.  
● What to do with the customers:  
- Send customers the survey and collect their feedback. |

3. STABILISING THE SUPPLY CHAIN

Another key aspect of reviewing and adjusting to this outbreak is the supply chain. This will help to ensure that you have the capacity to continue providing your products or services to your customers. First and foremost, it is crucial to define the extent and the estimated duration of your supply-chain exposure to areas that are experiencing community transmission, as well as your inventory levels.

You should start planning how to manage supply for products that may have unusual spikes in demand - some products may have increasing demand while others can decrease or even stop in certain times. Therefore, in some situations, stabilisation in the medium or longer-term may be necessary, requiring changes in demand planning, optimizing networks, and searching for and improving the qualifications of new suppliers.
### Table 3. Strategies and areas of action for stabilising your supply chain:

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| Supplier engagement              | - What to do internally:  
  - Review order management of inputs and other materials.  
  - Adjust your supplier qualifications based on the current COVID-19 regulations and identify them accordingly.  
- What to do with your suppliers:  
  - Communicate your new policy in a clear manner.  
  - Negotiate and help each other in this difficult time. |
| Inventory management             | - What to do internally:  
  - Identify stock and parts rationing.  
  - Run location and storage optimisation.  
- What to do with your suppliers:  
  - Check about the availability status of your critical stocks.  
  - Arrange schedules for delivery to maintain stocks. |
| Product and operations           | - Conduct an assessment of the impact of COVID-19 outbreak to your operation, such as decline/sharp rise of demand, or other potential circumstances that will make you adjust your production levels.  
- Accordingly, implement strategies to optimise your production capacity during this pandemic. |
| Demand management                | - Develop a new estimation of your sales and operations.  
- Create different scenarios.  
- Assure that your demand plans are aligned to production and sourcing plans. |
| Logistics                        | - Ensure logistics capacity pre-booking for the operational plan (sourcing, production and sales).  
- Optimize your route for sales distribution, adjusting to COVID-19 specifications. |

### 4. STABILIZING THE FINANCIAL SITUATION

SMEs and start-ups need to define scenarios tailored to the company’s context. For the critical factors that will affect revenues and costs, you can define key numbers through an analysis and recommendations by an expert. Together with your financial officer or team, you should model your financials (reviewing your cash flow, balance sheet, etc.) for each particular scenario you may consider, and identify obstacles or challenges that might significantly affect your liquidity. For each obstacle or challenge, you should define changes and actions to stabilise the business in each scenario. This also includes optimising accounts payable and receivable, production and distribution costs reduction, divestments, and as another option, consider in the medium term to attract some external investments if needed.
In the short and medium term:
- Cash flow analysis: Do you have enough cash flow? Consider delays in payments from customers and reimbursements you need to do for pre-ordered supplies and/or debt.
- Financial projection: Consider scenarios with low incomes. This means considering "de-growing", reducing volume of sales, but also, some of your biggest customers may cancel some services or limit their acquisition power (especially in retail, tourism and manufacturing).

In the long term:
- Create a scenario with a 12 months horizon. You may consider that attracting external financial capital may be difficult during the next 12 months.

Most importantly, you may need to ensure your more strategic income sources.
- Focus on your most profitable customers. You can identify your most resilient customers and take an analytical approach on how to add more value to them and keep them in the long term. Some key actions are:
  - Understand their needs and adapt your services and payment mechanisms to them (this is connected to your customer engagement strategy described previously);
  - Review your pricing strategy. Identify and analyse new prices benchmarking and new payment capacities of customers;
  - Create pre-order payment models for customers to buy/pay in advance for products or services;
  - Offer payment plans for strategic customers.

The COVID-19 crisis is affecting the economy as a whole, but each sector has its specific needs. Currently, there are initiatives and measures adjusted to the different fields that can be implemented in order to minimise these effects. In the next section, we have summarised some ideas that could be helpful and actionable for your business or sector:

### SECTOR

<table>
<thead>
<tr>
<th>If you run a restaurant, a bar or a shop</th>
<th>EXAMPLE</th>
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</table>
| Cheerfy | There are some relevant innovative measures and initiatives that are being implemented in order to minimise negative impacts for this sector:  
- **Cheerfy**: this app allows bars, pubs and restaurants to keep in touch with their customers through personalised and automatic digital interactions.  
- "**Adopt a Bar**" or "**Save our Restaurants**" allow customers, through their respective websites, to buy in advance vouchers with drinks or meals to enjoy them when the pandemic is over. |

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<tr>
<th>If you work in the tourism sector</th>
<th>EXAMPLE</th>
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| BizAway | Apart from the preventive and hygienic measures, some research and innovation is being put into practice in this sector, such as:  
- **BizAway**: tool to facilitate the repatriation of corporate travellers in a secure way. It also offers reservation cancellation in Italy, Spain and France. |
GlobalCAD is offering technical assistance to design Action Plans and Road Maps to help organisations thrive through the COVID-19 crisis. Organisations that complete the GlobalCAD self-diagnosis survey will be contacted by GlobalCAD’s experts and they will support them through their 5 step SME accelerator tool.

**GLOBALCAD’S ACCELERATOR TOOL FOR SMES AND ENTREPRENEURS**

**STEP 1**
Organization
Design and implementation of online questionnaire. Data gathering.

**STEP 2**
COVID-19 response assessment and value chain analysis
Process information from online questionnaire. Analyse responses.

**STEP 3**
In-depth organization analysis
SWOT based on ecosystem and context scenarios.

**STEP 4**
Action plan strategic design
Design a strategic action plan for each company engaged. Articulate action plan according to each company’s viability.

**STEP 5**
Action plan implementation
Step by step implementation of the action plan. Creation of an M&E framework with KPIs.
promoting partnerships and collaboration are at the heart of what GlobalCAD does. So is our capacity to lead teams and engage with clients online - working virtually is in our DNA. We are used to connecting private, public and non-profit organisations to promote transformative change, empower communities and improve human lives, particularly in a developing and in a crisis context. Now, the challenge is closer to home than it has ever been. We read the newspaper headlines about the staggering number of unemployed, the hundreds of business that are having to shut down or sharply decrease operations and we feel that we need to take action and support the community the best way we can.

JOIN THE INITIATIVE OR CONTACT US FOR MORE INFORMATION:

This is a living document and our methodology is an organic “wiki-approach” that we hope can improve as people collaborate. We want to ask for your help to fine-tune the methodology, recommend tools and useful guidelines, become an advisor and reach out to companies that would like to engage. Please e-mail info@GlobalCAD.org and let us know how you can help be a part of the solution.

Thank you, The GlobalCAD team
April 14, 2020

CONNECT WITH GLOBALCAD

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INFO@GLOBALCAD.ORG

If you wish to receive free online mentorship from GlobalCAD, please fill-in the online survey (click here to access the survey) and write an e-mail to info@globalcad.org.