The Pandemic Playbook
For Technology Solution Providers

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Introduction

Best-in-class companies have well-defined plans in the following areas:

- **Disaster Recovery.** These are procedures that should be executed when a disaster strikes.
- **Business Continuity.** These are procedures that should be executed so that mission-critical business functions can keep operating during and after a disaster.
- **Crisis Management.** A subset of business continuity planning, the crisis management plan contains the procedures that should be executed regarding effective communication and decision-making during a specific crisis.¹

A global pandemic clearly creates a crisis, as it impacts the global economy and creates a slowdown in demand for most technology providers. Companies have faced economic slowdowns before and have playbooks for this scenario.

A global pandemic is a unique crisis for three reasons:

1. It disrupts both the supply chain and consumer/business demand.
2. The ability to serve customers in person will be dramatically impacted.
3. The requirement to protect employee and customer health is paramount.

COVID-19 is the first global pandemic of this magnitude to occur in the modern age of the technology industry. TSIA member companies are learning the best ways to respond to this new challenge on a daily basis. To accelerate these learnings, TSIA will be maintaining and updating this playbook. The content that appears in this playbook is based on the expertise of TSIA researchers, data TSIA
Global Pandemic Playbook Workstreams

Again, a global pandemic is a unique crisis that will have an uncertain time frame. Working through the crisis, successful technology providers will quickly respond to short-term challenges and position themselves to better serve their customers over the long term. To navigate the crisis effectively, TSIA recommends companies focus on the eight workstreams illustrated in Figure 1 and described below.

**Figure 1: Global Pandemic Workstreams**

1. **Crisis Response.** These are urgent activities required to respond to the impact of the crisis. For more information on crisis response activities, read “Current Phase/Next Phase Capabilities.”
2. **Employee and Customer Protection.** These are activities designed to protect the health and safety of employees and customers as the pandemic grows.
3. **Remote Delivery Capabilities.** These are activities designed to support customers remotely since travel may be restricted.
4. **Remote Sales/Renewals Capabilities.** These are activities designed to support sales and renewal specialists to continue to promote the value of the companies’ products and services, and transact sales virtually.
5. **Visibility Indicators.** These are activities related to identifying what data the company will focus on to understand the current state of the crisis and create the best visibility possible in
uncertain times. This will include a combination of health, economic, and company performance data.

6. **Sales and Marketing Realignment.** The pandemic will create an economic slowdown, therefore, previous marketing campaigns and messaging may no longer be relevant. These are the activities to align sales and marketing messages and activities to the reality of the new marketplace. Sales and partner resources alignment should be reevaluated to meet customers’ needs.

7. **Strategy Review and Refresh.** As early as possible in this crisis, leaders should be assessing what this means to the company strategy. New market opportunities may present themselves. Most likely there will be a reprioritization of what current product and service initiatives are most important moving forward.

8. **Repurposing of Resources.** Again, the pandemic will create an economic slowdown. How will the company use this time effectively? Successful technology providers will be building out next-generation capabilities that will serve them well when the global economy begins growing again. What new tools and automations will be needed to effectively assist employees in effective and timely engagement with employees, customers, and partners?

**Crisis Response**

What are the tactics technology solution providers need to employ immediately in response to a global pandemic? Below is a list of activities TSIA recommends companies pursue as part of their immediate response in a global pandemic:

1. **Centralized communications team.** Establish a centralized team that is responsible for developing the communications that will go out to your customers, partners, and employees throughout the crisis.

2. **Customer support communications.** Communicate to your customer support contacts about how you will be supporting them given the current crisis.

3. **Customer training communications.** Communicate to your customers regarding training that has been canceled, will be canceled, or will be moving to live, virtual, instructor-led training and/or online learning options.

4. **Employee communications training.** Train all of your customer-facing teams regarding how to speak about the company’s response to the crisis.

5. **SLA reassessment.** Recommunicate or renegotiate SLAs based on your actual ability to respond to customer requests. In late March of 2020, during the COVID-19 pandemic, TSIA collected the data shown in Figure 2 regarding restructuring SLAs.

For more in-depth information on corporate communications, [download this report](#).
6. **Documented risk management methodology for serving customers.** Establish a documented process for assessing if and when employees should be engaged to customer sites.

7. **Leveraging local partners.** Identify and engage local channel partners in ensuring local customer care is possible, as needed, for your customers with critical needs during the crisis.

8. **Centralized payment and pricing review.** Establish a centralized team to authorize changes to payment terms, changes to offer list prices, or discount policies during the crisis.

9. **Review current automated marketing campaigns.** Campaigns in the queue may be inappropriate at this time.

10. **Reduce CSAT and NPS transactional surveys.** During the crisis, stop or lower the volume of transactional surveys.

11. **Renewal management.** Assign additional sales cycles to review and strategize on upcoming contract renewals. While this may seem premature, if there is a long economic downturn, renewal revenues will be critical to financial survival.

**Employee and Customer Protection**

A global pandemic, first and foremost, is a threat to the health of employees and customers. TSIA recommends companies pursue the following activities to protect the health of all stakeholders:

1. **Employee deployment policy:** Establish clear process and criteria for when you are willing to deploy service staff onto a customer’s site as the pandemic expands. The risk assessment methodology established in your initial crisis response will inform this activity.
2. General travel policy: Establish a process and criteria for approving any employee travel. Establish clear employee communications with regard to following governmental travel restrictions and protocols. Ensure emergency contact information is up to date for all employees in case of a home- or travel-related emergency.

3. Work-from-home policies and tools: Most likely, employees will need to create social distancing and work from home. Document work-from-home policies. Establish technical configurations to support at-home employees.

4. Employee mental health services: Establish adequate access to mental health resources for your employees during the crisis.

5. Executive succession plans: Ensure executive succession planning is completed and that policies are in place should succession plans need to be activated.

Remote Delivery Capabilities

In a global pandemic, the ability to serve customers remotely will be paramount. In March of the 2020 COVID-19 pandemic, TSIA took a poll asking companies the state of their ability to deploy field service technicians on site. The results are in Figure 3.

Figure 3: Ability to Deploy FS Engineers During a Pandemic

![Graph showing the percentage of FSE deployments impacted](image)

88% of FSE deployments are impacted.

TSIA recommends companies pursue establishing the following capabilities related to remote delivery:

1. **Customer-only secure portal.** Establish a member-only, secure web and/or mobile portal through which you can communicate any urgent updates regarding your services.
2. **Partner-only secure portal.** Create a partner-only, secure web and/or mobile portal through which you can engage your partners, approve pricing and special terms, engage in communications, and assist with the escalation of presales and post-sales customer requirements.

3. **Remote partner assistance.** Be able to assist your channel partners remotely, as necessary, for their emergency needs.

4. **Remote implementation.** Have the ability to implement your offers remotely.

5. **Remote support.** Enable remote dial-in support and/or online diagnostics.

6. **Virtual delivery infrastructure.** Establish live virtual instructor-led training, online learning, and pre-sales demo capabilities.

For more information on the trends related to extreme remote services, read *Industry Scenario: Extreme Remote Services.*

**Remote Sales/Renewals Capabilities**

In a global pandemic, the ability to connect with customers and represent a company’s value will shift in tone and in operational approach. TSIA recommends companies pursue the following capabilities related to selling and renewing products and services:

1. **Sales empathy training.** Helping will sell, but selling may not sell. The theme of listening is more important than ever. Attempting to sell when customers are preoccupied with the events impacting their business must be adjusted with increased sensitivity and empathy.

2. **Sales training with promotion of shared outcomes.** Helping customers achieve their business goals while overcoming pandemic impacts to core business problems will be viewed positively.

3. **Secured remote data access.** Enabling sales and renewal specialists with remote access to secured and sensitive data is a key component of virtual work. Data protection guidelines must be known and followed extensively as we enable professionals to utilize data to complete their work.

4. **Communication strategy and capabilities.** Remote sales requires access to secure telephony, network, and conferencing/video-conferencing capabilities. Face-to-face interactions may be replaced by an abundance of communication strategies to enable effective communication.

5. **Shared performance dashboard visibility.** Virtual sales teams may lose track of their progress without a “North Star” view for tracking how they are progressing relative to their personal goals and their peers’ goals.

6. **Reevaluate internal workflows.** Evaluate internal and external-facing processes and look for opportunities to add automation solutions to expedite handling of inquiries, routine tasks, approvals, reports, etc.
For more information on assigning responsibilities for renewal management, read "Who Should Own Renewals?"

Visibility Indicators

Economic visibility will be low, and uncertainty will be high during a global pandemic. Executive teams should identify what indicators they will track to better understand the state of the pandemic and the state of the economy. TSIA recommends companies pursue the following activities regarding visibility indicators:

1. **Real-time pandemic.** Identify what real-time sources and data points the company will reference to understand the state of the pandemic globally.
2. **Real-time economic indicators.** Identify what real-time sources and data points the company will use to assess the direction of the economy. In response to this need, TSIA is working to establish a real-time dashboard on the following economic indicators:
   a. Technology bookings.
   b. On-site services bookings.
   c. Remote services bookings.
   d. Operating budget reductions.
   e. Headcount reductions.

Sales and Marketing Realignment

Marketing campaigns and messaging that was in place before this event may no longer be relevant. TSIA recommends companies pursue the following activities to assess and refresh demand-generation activities:

1. **Pause automated campaigns.** Review messaging and determine if it is still appropriate.
2. **Develop crisis messaging.** Determine what messaging you will use as the crisis is in play.
3. **Sales forecast refresh.** Review expectations and accuracy of all sales forecasts. Conduct regular reviews of the forecast and be especially conservative.
4. **Sales development rep (SDR) compensation.** Consider not setting targets during the period of most uncertainty, but replace with a SPIF based on value created (per appointment, lead generated, etc.).
5. **Utilize the downtime.** Identify skills development initiatives that you can implement during the time that field sellers would have spent travelling.

Strategy Review and Refresh

It is a proven best practice that companies that excel after a crisis do so because they spent time on their business strategy during the crisis. They do not simply focus on the short-term issues related to
the crisis. TSIA (and others) recommend leadership teams pursue the following activities related to strategy:

1. **Changes on the demand side.** Identify potential changes in what and how customers will consume your offers after the crisis. Are there different or enhanced capabilities customers will now need from you? Will they prefer to purchase with lower risk OpEx budgets versus CapEx expenditures?

2. **Changes on the supply side.** Identify new organizational capabilities that could create competitive advantage post-crisis. Is the organization effectively skilled and equipped to handle the identified demand-side changes?

3. **Review suppliers’ health and build contingency.** Review the health and cash position of each of your critical suppliers and set in place contingency plans for suppliers of parts, inventory, and other goods and services required for running your business.

4. **Prioritize financially painful initiatives.** Companies often delay strategic initiatives that have the potential to impact the quarterly financial performance of the company. During a global economic downturn, investors are not expecting stellar financial performance. This reality provides air cover to pursue more challenging initiatives. This may be a good time to rebalance the solution portfolio investments.

For additional content on refreshing your business strategy in a crisis, read "Recurring versus Transactional Business Models in a Downturn."

For more information on strategic planning during a crisis, refer to “Navigating Hazy Horizons.”

**Repurposing of Resources**

Top race-car drivers return to the pits to optimize their cars during a yellow flag when the track is "on hold." They do so to increase their chances of winning once the track returns to full power. In much the same way, companies that excel after a difficult economic downturn do so because they spent their time during the downturn wisely and productively. In effect, they optimize their time spent during the “pit stop.” TSIA recommends companies pursue the following activities regarding resource allocation during the crisis:

1. **Evaluate end of life.** Review offers that were struggling in the marketplace before the crisis. Identify which of these offers can be wound down so that resources can be reallocated to offers that are expected to grow post-crisis. Redirect spending to newly identified market opportunities and innovations.

2. **Prioritize post-crisis capabilities.** Based on the output of the Strategy Review and Refresh activities, reallocate resources to building out strategic capabilities that will serve the company well post-crisis.
Endnotes