



Tabletop Exercise Template

Train and improve your response in a low-stakes environment with tabletop exercises.



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We conduct quarterly tabletops with surprise scenarios for our crisis management team. We also perform company-wide exercises... We are constantly promoting preparedness and finding ways to engage our teams. Crisis preparedness is part of our DNA. You can't let your emergency plans sit and collect dust. Having an active program is essential to keeping employees safe."

— Penny Neferis, Director of Business Continuity & Emergency Response, JetBlue Airways

Getting Started

In an emergency, critical decisions need to be made fast. From fires to natural disasters to acts of workplace violence, the heat of the moment is not the time for your emergency response team to question what they are supposed to do. Instead, you need to practice how to respond effectively long before the emergency.

Tabletop exercises are an essential aspect of emergency preparedness. In this guide, you'll learn a step-by-step framework for conducting effective tabletop exercises, get pre-made templates for running and evaluating your exercises, and access a list of example scenarios for exercises you might want to run. This template makes it easier to run productive tabletop exercises in your organization that will help participants test, learn, and refine emergency action plans.

Before You Begin

While tabletop exercises offer an inexpensive, low-risk way to assess the viability of your emergency preparedness program, they shouldn't be thrown together on the fly by one or two people. A successful tabletop exercise works best with cross-functional planning and coordination. Before you conduct a tabletop exercise, here's what to prepare so your investment results in meaningful insights and improvements in your response:

IDENTIFY PARTICIPANTS

- ☐ Identify the stakeholders who will participate in the exercise. Here are a few key roles to include:
 - **Facilitator**—Leads the exercise and moderates the discussion
 - **Evaluator**—Watches the exercise unfold, takes notes, and scores the four different facets of the exercise using the provided scoring guides
 - **General participants**—Take on different roles and practice responses during the exercise
- ☐ Determine if any first responders or emergency officials, such as local fire and rescue, law enforcement, or public works organizations, should be involved.

DETERMINE SUBJECT MATTER

- ☐ Set your mission areas and objectives for the exercise. These can range from understanding the gaps in your current plan to exploring potential policy changes.
- ☐ Pick a realistic scenario for the exercise. It should address the defined exercise objectives and reflect a real threat your business may face.
- ☐ Develop injects (problem statements) the exercise facilitator can use to help direct and stimulate discussion.

SET UP EXERCISE LOGISTICS

- ☐ Decide on a format for the exercise based on your objectives. Depending on your goals, it may make sense to conduct exercises by location or department.
- ☐ Schedule an appropriate amount of time to complete the exercise, generally between one and three hours.
- ☐ Ensure all participants, facilitator, and evaluator receive a complete package of relevant information in advance to guide the exercise.
- ☐ Check audio-visual equipment and test any technology that might be used during the tabletop.
- ☐ Fill out the tabletop exercise overview template (provided below) with the details of your exercise.



We do tabletop exercises, getting all of those stakeholders in the same space to walk through different scenarios. The awareness and continual training of all our policies gives [our front-line workers] the confidence they need to be able to go out and succeed and be empowered to make decisions in real time."

— Emily Drexler, Senior Director of Safety and Security, Atlanta Hawks

How to Lead a Tabletop Exercise

With the pre-exercise work completed, the next step is to actually run the exercise. Here are some guidelines that will help you lead an effective tabletop exercise:

1 Brief Participants

Once participants are gathered, start the exercise by briefing participants on the objectives. Review assigned roles, ensure participants understand their responsibilities, and provide everybody with the Exercise Overview.

2 Set Ground Rules

Next, lay the ground rules that detail the code of conduct for the exercise. Using a flip chart, presentation, or handout, share key exercise guidelines and parameters with participants. Ground rules should encourage feedback, open communication, and open-mindedness. Reiterate to participants that titles should be left at the door, and nobody will be judged or graded on their performance.

3 Present and Moderate

To begin the exercise, describe the scenario, then let the discussion evolve naturally on its own. If necessary to get the discussion flowing and stimulate conversation, nudge the participants with open-ended, non-leading questions such as, “What would you do in this situation?” or “How would you communicate this to the broader organization?” The evaluator should watch and take detailed notes to help in reviewing the exercise.

4 Repeat With a Twist

Repeat the scenario several times, each time with an inject. Perhaps the key decision-maker is out sick or unreachable, a communication channel is down, or there are adverse weather conditions to contend with. These injects add a level of real-world complexity to the exercise and help identify often-overlooked gaps.

5 Evaluate and Review

Written by the exercise evaluator, the scoring guides compile information about your organization’s response to what happened during the tabletop exercise. By analyzing staff performance and the overall effectiveness of your emergency response procedures, the goal of the scoring guide is to identify gaps and areas for improvement. Using the feedback in the scoring guides, you can focus on ways to improve your emergency preparedness.



TIP: As part of the exercise—whether it’s conducted in person or remotely—you’ll want to incorporate the use of your emergency communication solution.

If you are testing an evacuation or emergency response, for example, practice sending a test notification to make the exercise more realistic and reinforce how to use the system.

Tabletop Exercise Overview Template

Exercise Name

Exercise Date & Time

Scope

Mission Area(s)

Threat or Hazard

Core Objectives

Scenario

Injects

Participants

Notes

Tabletop Exercise Scoring Guide

Use this rubric to score how effectively your team responded to the scenario and document recommended improvements in each of these core areas.

Communication

GRADE

Outstanding _____

Satisfactory _____

Poor _____

Unsatisfactory _____

NOTES:

Planning

GRADE

Outstanding _____

Satisfactory _____

Poor _____

Unsatisfactory _____

NOTES:

Response

GRADE

Outstanding _____

Satisfactory _____

Poor _____

Unsatisfactory _____

NOTES:

Recovery

GRADE

Outstanding _____

Satisfactory _____

Poor _____

Unsatisfactory _____

NOTES:

Example Exercise

Exercise Name

Hurricane Evacuation—Florida Office

Exercise Date & Time

August 5, 2:00–5:00 pm

Scope

This exercise is a discussion-based tabletop exercise planned for three hours. It will be conducted virtually at Facility's Zoom Link. The following mission areas and objectives will be the primary focus of the exercise.

Mission Area(s)

Protection & Mitigation

Threat or Hazard

Category 3 hurricane

Core Objectives

The primary purpose of this exercise is to [insert description] and will focus on assessing the following:

- 1. Communicating evacuation orders*
- 2. Preparing employees to evacuate*
- 3. Protecting facility from harm*
- 4. Mitigating risk of extended office shutdown*

Scenario

A Category 3 hurricane is heading toward the Florida office location. The business continuity team has been monitoring the storm and has decided to issue evacuation notifications ahead of any formal evacuation notice to better mitigate harm to employees. Your objective is to prepare the facility and communicate pertinent information to impacted employees and stakeholders.

Injects

- The storm strengthens to a Category 4 hurricane*
- The storm weakens and official evacuation orders are deemed unlikely*
- The evacuation route is shut down due to damage from the storm*
- The facilities manager is trapped at home by the storm and is unable to fulfill their typical duties*

Participants

*Facilities team
Chief People Officer
Business Continuity team*

Notes

Send a test notification to the participants using the evacuation template.

Facilities manager should come prepared with a list of what would be done to prepare the office for evacuation.

Sample Tabletop Exercise Scenarios

Refer to these potential scenarios while you plan what tabletop exercises to perform. However, be sure to tailor the situations to your people, facilities, and operations so your team will be prepared with the most realistic situation.



Structure fires

There is a fire in the building. The alarms have gone off and the sprinklers have turned on in the affected area. An evacuation is necessary, and first responders will be on their way soon.

OTHER FIRE SCENARIOS:

- A kitchen fire
- An electrical malfunction
- An unsafe or blocked fire evacuation route



Inclement weather

A severe storm is approaching that is predicted to make conditions unsafe for travel to or from the facility. You have employees in the building, and a new shift is planned to arrive in a few hours.

OTHER WEATHER SCENARIOS:

- Downed power lines causing an outage
- Iced-over roads preventing car travel
- Extreme heat above the safe threshold



Cybersecurity incidents

An employee clicked on a phishing email and their computer is compromised. IT must identify the full scale of the attack and follow protocols to mitigate damage.

OTHER CYBER SCENARIOS:

- Cloud storage breach
- Malware or ransomware attack
- Third-party cyberattack on a critical vendor



Workplace violence

An employee grows agitated during an offboarding meeting and makes threatening remarks against their manager and company leadership team. The ex-employee is escorted off the premises, and security must take steps to protect those threatened.

OTHER WORKPLACE VIOLENCE SCENARIOS:

- Active shooter scenarios
- Threats from customers or clients
- Domestic violence incidents



Workplace injuries and accidents

An employee attempts to stand on their desk chair to reach something in a tall cabinet. The chair rolls out from under them, and they fall, breaking their back upon landing.

OTHER INJURY SCENARIOS:

- Slips, trips, and falls
- First-aid responses
- Health incidents, such as heart attacks



Business travel disruptions

A team of salespeople traveled to work at a conference in Paris. On the last day of the conference, a public transit strike shuts down all trains and buses, and rideshare services are overbooked. The team is supposed to fly home that afternoon, but there is no way to get to the airport.

OTHER TRAVEL SCENARIOS:

- Flight delay or cancellation for a critical staff member
- Foreign insurgency or civil unrest
- Pandemic or public health-related travel restrictions



Natural disasters

A wildfire is burning near your facility and an uptick in strong winds has moved it toward your buildings. There is no current evacuation notice, but employees are asking what the protocol is.

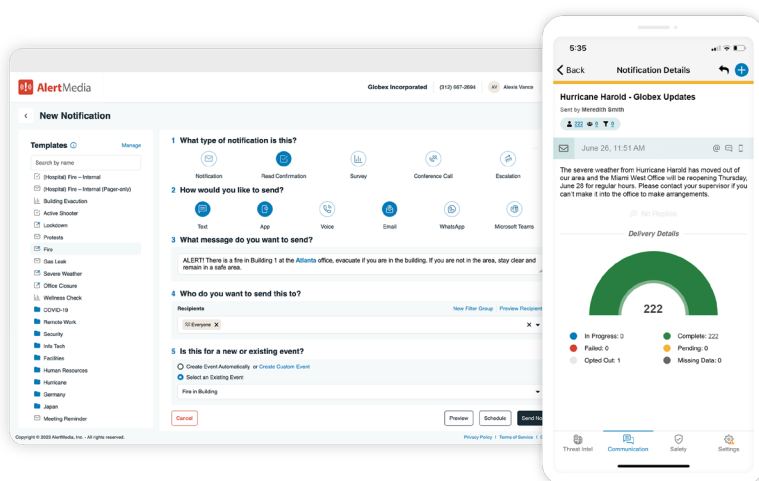
OTHER DISASTER SCENARIOS:

- Gas shortage from an offshore hurricane
- Secondary fire from an earthquake
- Extreme drought



The Best Solution to Support Your Preparedness Efforts

When done right, tabletop exercises provide incredible insight and ensure your people have the confidence, skills, and tools needed to respond effectively to any crisis or business disruption. And with a modern threat intelligence and emergency communication solution like AlertMedia, you can be sure your preparedness efforts are backed up by technology you can trust. With real-time threat alerts and fast, reliable multichannel communications, AlertMedia is your partner in keeping your people safe during any critical event.



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