Must-Do Crisis
Communication Checklist for Credit Unions

Must-Do Tasks in a Crisis
A Quick Guide for Credit Union Teams

Whether it's public filming, unexpected media attention, or an operational disruption, responding calmly and consistently can make all the difference. Use this checklist to guide your actions and communication.

1. **Stay Calm and Centered**
   Take a breath and remain professional. Your demeanor sets the tone. Do not speculate, joke, or react emotionally.
2. **Notify Internal Leadership**
   Immediately inform your branch manager or designated supervisor. Follow internal escalation protocols.
3. **Secure the Environment**
   Ensure member and staff safety first. Limit access to restricted areas, if needed.
4. **Avoid Public Engagement**
   Do not confront or interact with the individual unless necessary. If you must speak, be courteous, brief, and factual.
5. **Stick to Approved Messaging**
   Use prepared responses when talking to members or the public.
   Example: *"We're aware of the situation and are following our internal protocols to ensure everyone's safety."*
6. **Document the Incident**
   Note the date, time, location, people involved, and what occurred. Capture screenshots, photos, or video only if appropriate and permitted.
7. **Coordinate with Communications/PR Team**
   Send a summary report to your credit union's communication lead. Do not post or comment about the incident on social media.
8. **Conduct a Post-Crisis Debrief**
   Review what happened and how it was handled. Identify improvements to protocols or communication strategies.

Quick Reminders

- You represent your credit union's values at all times.
- Professionalism protects both reputation and relationships.
- Crisis moments are opportunities to reinforce trust and calm.

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True leadership is shown not in what we say, but in how we respond.