

# PART 2: Pre-Opening Planning Checklist

## OVERVIEW

This portion of your SMART Business Reopening Toolkit provides a Pre-Opening Planning Checklist, outlining the following areas:

- [Make a Plan](#)
- [Assess Your Business Needs](#)
- [Create Procedures](#)
- [Address Security](#)
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  - [With Your Employees](#)
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## MAKE A PLAN

Develop your new business plan while taking into consideration:

- **Your budget**
  - How much capital can you access and how can you best put that money to use?
- **Your space/location**
  - Conduct a thorough [hazard assessment](#) to determine if workplace hazards are present, or are likely to be present, and determine what type of controls or PPE are needed for specific job duties.
- **Your supply chain**
  - Identify alternate supply chains for critical goods and services. Some goods and services may be in higher demand or unavailable.
  - What do your supply chain vendor relationships look like right now? Would it make sense to look for any new vendors to help you meet short-term needs as you reopen?
  - If you have international operations, consider current challenges concerning shipping certain products (such as PPE) across borders. You may have to modify your traditional supply chain routing.
- **Your products/services**
  - How can you pivot your offerings to be relevant to your customers' needs right now?
- **Your revenue impact**
  - What is the scope of your coronavirus-related losses right now, and how much do you expect to recoup once you're fully operational again?

## ASSESS YOUR BUSINESS NEEDS

Look at your numbers and data to determine the bare minimum you need to get things going again. Ask questions such as:

- **What will initial staffing requirements be?**
  - What percent of employees should come back?
  - Who returns first?
  - At what intervals?
- **What employee safety concerns will you need to address?**
  - Are you ready to protect employees at [higher risk](#) for severe illness?
- **What do customer needs/demands look like now?**



# CREATE PROCEDURES

Update your company's documented procedures to incorporate a Safe Work Plan, found in Part 5 of this Toolkit. Ensure that your procedures address the following:

- 1) A comprehensive COVID-19 exposure control, mitigation, and recovery plan, including policies regarding the following control measures:
  - PPE utilization
  - On-location physical distancing
  - Hygiene and sanitation
  - Symptom monitoring
  - Incident reporting
  - Location disinfection procedures
  - COVID-19 safety training
  - Exposure response procedures
  - A post-exposure incident project-wide recovery plan.  
*Note: A copy of this plan must be available at the location and available for inspection by state and local authorities.*
- 2) Identifying a Safe Work Plan lead/coordinator who will be responsible for COVID-19 issues and their impact at the workplace
- 3) A communication plan for calling employees back to work
  - Prepare written correspondence to memorialize recall, maintaining written records of employees who refuse to return.
  - Review local laws concerning recall and worker retention rights.
  - Prepare a strategy for securing onboarding paperwork, including I-9s, for employees who were laid off.
  - Create a plan for notifying your local unemployment agency of furloughed employees who refuse to return to work.
- 4) Review of sick leave policies
  - Ensure that sick leave policies are flexible and consistent with public health guidance.
  - Ensure these policies have been documented and that employees are aware of and understand them.
- 5) Maintenance of flexible policies that permit employees to stay home to care for a sick family member
  - Employers should be aware that more employees may need to stay at home to care for sick children or other sick family members than is usual.
  - Employers not currently offering sick leave to some or all of their employees may want to draft non-punitive "emergency sick leave" policies.
  - Talk with companies that provide your business with contract or temporary employees about the importance of sick employees staying home and encourage them to develop non-punitive leave policies.



- 6) How to handle refusal to work and requests for accommodations
  - Consider issues around “at-risk” groups, accommodations due to logistical and other barriers to returning to the worksite, exceptions and processes for parents/caregivers when schools are closed or other caregivers are unavailable, etc.
  - Plan for swift transition to Human Resources if an employee’s rationale for not wanting to return to work or requesting an accommodation warrants engagement in the interactive process.
- 7) The steps and frequency for cleaning and sanitizing in both customer-facing and employee-only areas
  - Ensure operating hours allow downtime between shifts for thorough cleaning.
- 8) Procedures for regularly disinfecting inventory and newly received deliveries, as well as protocols for handling and processing shipping and receipts (including disinfection)
- 9) Protocol for monitoring occupancy (metering) in compliance with applicable laws
  - Consider whether you can designate specific entrances or exits for ingress or egress to control the flow of traffic and reduce contact.
- 10) Communication systems that employees can use to self-report if they are sick and that you can use to notify employees of exposures and closures
  - Include a forum for answering workers' concerns and internet-based communications, if feasible.
  - Create platforms for communicating with employees such as emails, automated phone calls, texts, websites, and signage.
- 11) Minimizing risk to employees when planning meetings and gatherings
  - Use videoconferencing or teleconferencing when possible for work-related trainings, meetings and gatherings.
  - Cancel, adjust, or postpone large work-related meetings or gatherings that can only occur in-person in accordance with state and local regulations and guidance.
  - When videoconferencing or teleconferencing is not possible, hold meetings in open, well-ventilated spaces continuing to maintain a distance of 6 feet apart and wear cloth face coverings.



# ADDRESS SECURITY

In the COVID-19 era, security procedures may change. Ensure the safety of your business and your data by considering the following:

- 1) If your business has been able to operate remotely during the crisis and plans to continue this arrangement long-term, cybersecurity will need to be a top priority. Coronavirus scams are rampant and your employees are the first line of defense against hackers.
- 2) If employees will be working from home on a more permanent basis, consider the technical infrastructure needed to ensure the security of your sensitive business and customer data. This may include banning personal device use for business purposes, limiting company-wide file access, making password managers mandatory, implementing multi-factor authentication, and training (or re-training) employees on cybersecurity best practices.



# COMMUNICATE

## With Your Employees

- Explain the details of changes, new work practices, and guidelines for health and safety.
  - Communicate that employers may limit office hours and close-off or prohibit public access if needed.
  - Health checks and reporting requirements of individuals infected with COVID-19 should be explained to employees prior to reopening and again once operations have resumed.
- Host pre-return to work training.
  - Use training methods that do not involve personal meetings.
  - Provide workers with up-to-date education and training on COVID-19 risk factors and protective behaviors.
  - Provide adequate, usable, and appropriate training, education, and informational material about business-essential job functions and worker health and safety, including proper hygiene practices and the use of any workplace controls (including PPE). Informed workers who feel safe at work are less likely to be unnecessarily absent.
- Get input from your team.
  - If your business is customer-facing, ask your staff for their thoughts and concerns about interacting with customers in the near term, given the current circumstances.
- With larger staffs, use communication boards to or digital messaging to convey pre-shift meeting information.

## With Your Customers

- Give your customers a heads up on what they can expect.
  - Stay in touch with your customers and let them know to stay tuned for an upcoming announcement, even if you don't have an exact date for reopening yet.
  - Use multiple channels to ensure your message is widely received and reinforced.

## With Your Vendors & Partners

- **Coordinate with your vendors.**
  - If you've been shut down, start reaching out to vendors to re-establish your supply chain and administrative support.
  - If you've been operating in a limited capacity, plan ahead for how your inventory needs may increase as business picks up.
  - If you plan to continue working together as your business reopens, let them know what (if anything) might need to change about your working relationship.



# DEVELOP A TIME FRAME

Plan out an anticipated schedule of pre-opening tasks. From deep-cleaning and sanitizing, to rearranging furniture, to encouraging social distancing, make a list of everything you'll need to do to get your business customer-ready. Reference Part 3 of this Toolkit for your Industry-Specific Reopening Action Checklist.

## Example Controls to Prevent the Spread of COVID-19 in Work Environments

### **Facilities and Equipment**

- Assess job hazards for the feasibility of engineering controls
- Ensure ventilation and water systems operate properly
- Alter workspaces to maintain social distancing. Examples include:
  - Configure partitions as a barrier shield
  - Move electronic payment reader away from cashiers
  - Use verbal announcements, signage, and visual cues to promote social distancing
  - Remove/rearrange furniture
  - Provide remote shopping alternatives (e.g., delivery, pick-up)

### **Management and Communications**

- Monitor state and local public health communications about COVID-19
- Encourage sick workers to report symptoms, stay home, and follow CDC guidance
- Develop strategies to:
  - Manage worker concerns
  - Communicate with workers
- Remind workers of available support services
- Communicate to partners, suppliers, other contractors on policies and practices
- Encourage social distancing and the use of cloth face coverings (if appropriate) in the workplace
- Use technology to promote social distancing (e.g., telework and virtual meetings)
- Cancel group events
- Close or limit the use of shared spaces
- Ask customers who are ill to stay home
- Consider policies that encourage flexible sick leave and alternative work schedules.
- Schedule stocking during off-peak hours

### **Cleaning and Disinfection**

- Clean and disinfect frequently touched surfaces, (e.g., counters, shelving, displays)
- Provide employees with disposable disinfectant wipes, cleaner, or sprays that are effective against the virus that causes COVID-19



## Employee Training

- Policies to reduce the spread of COVID-19
- General hygiene
- Symptoms, what to do if sick
- Cleaning and disinfection
- Cloth face covers
- Social distancing
- Use of PPE
- Safe work practices
- Stress management

## PPE

- Conduct workplace hazard assessment
- Determine what PPE is needed for their workers' specific job duties based on hazards and other controls present
- Select and provide appropriate PPE to the workers at no cost.

Source: <https://www.cdc.gov/coronavirus/2019-ncov/community/guidance-business-response.html>

# TIPS & BEST PRACTICES

## Be Ready to Adapt

- **Anticipate and prepare for challenges.** No matter how prepared you are, you may find that some elements of reopening your business are more difficult than you expected. You may need to change directions quickly and make swift decisions to overcome obstacles.
- **Check in with your employees.** During your first few weeks of operating "normally," check in frequently with your staff and see how they're feeling. See if there's anything you can do to give them greater peace of mind about their health and safety. Be aware of workers' concerns about pay, leave, safety, health, and other issues that may arise during infectious disease outbreaks. Ensuring employee comfort helps instill confidence in management and employer during a stressful time.
- **Know that you won't get it perfect on day one.** Mistakes may happen as you execute your reopening plan. If something goes wrong, quickly acknowledge the situation and let employees and customers know how you're making it right.
- **Create processes for getting feedback.** Listening to your employees, customers, vendors, and partners during this time is critical for your future success. Utilize a variety of personal and anonymous systems to encourage your stakeholders to share their thoughts.



- **Analyze your sales data, customer behavior, and ROI.** Your numbers likely won't bounce back right away, especially if you've changed your product or service offering. Keep an eye on your business analytics to understand what's working and what's not.
- **Gauge the overall community response.** Pay attention to what customers are saying about you (and your competitors) as everyone adjusts to your industry's operational changes. Take customer suggestions seriously and always acknowledge anyone who mentions your business directly

### **Respond and Pivot Your Strategy Accordingly**

- **Make adjustments based on feedback.** Your employees and customers may be feeling apprehensive and nervous right now, so it's more important than ever to meet their needs. Do what you can to adjust your operations in response to stakeholder feedback.
- **Communicate evolving changes in a timely, transparent manner.** Let people know what's happening and why. If appropriate, give credit to the employee or customer who inspired the change so your audience knows you're listening to them.
- **Continue mapping out your road back to normal.** Normalcy is not going to happen overnight. In fact, "normal" for you moving forward may look very different from what it looked like pre-pandemic. Your journey back to the volume of customers you had before may take time, but keep your focus on learning, growing, and evolving as new information becomes available.

