

Crisis management expert Edward Segal shares why every project leader must be ready for the unexpected. In this episode, he shares guidance on preparation, response, and resilience—while warning against the “hero mindset” that often derails leaders in high-pressure moments. His message is clear: structured strategies, not spontaneous heroics, are what protect careers, reputations, and teams when crises inevitably arrive.

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Intro

EDWARD SEGAL: Denial is not a strategy. You have to be prepared for a crisis, the good, the bad, and the ugly ways. You have to make sure you're focusing on the best way and not the worst way to respond to a crisis.

WENDY GROUNDS: Hello, and welcome to [Manage This](#), the podcast by project managers for project managers. We are thrilled to have you with us today. I'm Wendy Grounds, and with me in the studio is Bill Yates. Don't forget, you can earn free professional development units from PMI just by listening to this episode. Stick around until the end and we'll tell you how to claim them.

Picture this. Your project is running smoothly, deadlines are in sight, the team is clicking, when suddenly chaos erupts. Maybe it's a stakeholder that drops out, or your company gets hit with a cyberattack, or a headline-grabbing scandal pulls you into the spotlight. What do you do when your project turns into a full-blown crisis? That's exactly what today's guest knows better than almost anyone. Edward Segal has spent more than 30 years at the epicenter of crisis management, guiding organizations through disasters, scandals, and emergencies, including the kind of nightmare scenarios that project managers hope they'll never have to face.

BILL YATES: He has seen a lot of chaos from the sidelines. He's sitting there eating popcorn and seeing how these large companies do when bad things happen. Edward shared with us a copy of "[The Crisis Casebook](#)." In that there are short chapters that focus on some aspect of crisis management. And he always gives the most interesting examples. So many lessons to be learned.

And as project leaders we can look at it and think, okay, what do I need to do, what kind of preparation do I need to take with my team so that when the crisis does happen – not if, but when – we've got our act together. We have a plan that's going to work. Super helpful information I can't wait to get into with him. He talks about some basics, too, Wendy: See it, say it, sort it. Right?

WENDY GROUNDS: Right. Yeah, if you see something, do something...

BILL YATES: That's right.

WENDY GROUNDS: ...is his golden advice. So, buckle up, folks, because when crisis strikes, it's not about if you'll face it, but how you'll handle it. And Edward Segal is here to help us prepare before disaster knocks on our project's door.

Hi, Edward. Welcome to Manage This. Thank you so much for being our guest today.

EDWARD SEGAL: Thanks. It's great to be with you today.

Define a Crisis

WENDY GROUNDS: Yeah, we have really enjoyed your book with the many, many, the multiple examples you give us of companies that have dealt with crisis management. To set the stage, can you kind of give us a brief outline of why crisis management is a reality for every project manager?

EDWARD SEGAL: Well, I define a crisis as something bad that happens to your company, organization, or even project managers. Something that could impact their image, their reputation, and their profits, their ability to attract or retain employees; and especially for project managers, something that could damage or perhaps even end their careers, depending upon the nature of the crisis.

And unfortunately, the crisis management Hall of Shame or the Hall of Fame is full of examples of companies and, dare I say, project managers and senior executives that

assumed or hoped or denied that they would ever have a crisis until they did. And that's one fundamental practice of good crisis management.

Denial is not a strategy. You have to be prepared for a crisis, the good, the bad, and the ugly ways. You have to make sure you're focusing on the best way and not the worst way to respond to a crisis.

The Danger of The Hero Mindset

WENDY GROUNDS: Now, a lot of project managers in a project when a crisis happens or they see something coming on the horizon, they sometimes feel that pressure to be the hero when the project hits that crisis. What's the danger of that hero mindset?

EDWARD SEGAL: Well, depending upon the nature of a crisis, it can be a pressure-filled, stressful situation. And unfortunately, in those situations, project managers may let their emotions override their logic or even their training, if they've had crisis management or crisis communications training. They could also forget or ignore the best practices for responding to a crisis and can actually make a crisis worse or extend it or, in worst-case scenarios, even create a new crisis. And they also forget the chain of command at their organization and who's in charge of the company.

If there is a crisis management response team in place, literally they should know their place in the scheme of things and not try to assume something and not try to do something or say something that they have no responsibilities or right to do. If they violate any of those basic principles, that's what's going to make a crisis worse, and it could actually end the career of that project manager.

Five Steps to Protect Yourself in a Crisis

BILL YATES: That's so true. Edward, I think at this point you've got the attention of all of our listeners. We want to do great work as project managers. We also want to keep our jobs. You know, as project leaders we've all experienced those examples where something really bad happened and there was a moment where we felt like, okay, I may lose my job over this one. So, crisis management is important from that regard.

Also, there's that sense of accountability where many times leaders or the customer, they're looking to a single person to say, okay, who do I blame, or who do I look to to guide us out of this crisis? What are five steps that project managers can take to protect themselves and their careers and safeguard their reputation when a crisis seems to have them right there in the target?

EDWARD SEGAL: Well, that's a great question. Step one, when you see something, do something. If you see a crisis that's unfolding, or a problem or an issue that could morph into a crisis, don't keep it a secret. Don't keep it to yourself. Tell your immediate superior; or, if it's a flat organization, the person that would be able to do something right away in response to the situation.

Step two, don't trust your memory. Write a detailed account of what you knew; when you know it; how you know it; what you said or did about it; and who you told; and how, when, why, and where. Writing it down is really important because, if a crisis becomes a disaster for the company and a potential career-ending situation for the project manager, that manager needs to have everything written down, all the details, and not trust it to their memory.

Next step, before a crisis strikes, find out all you can about whether your company has a crisis management plan in place; if they've practiced that plan; what your role, if any, is in that plan; what your responsibility would be when a crisis strikes.

Next step, know and respect their place in the crisis management chain of command. Don't leapfrog over others that have the responsibility. Don't assume that you have the right to say or do anything in a crisis. So, know and respect your place, your position in the chain of command.

And then number five, pay attention. Pay attention to how others, other project managers, other senior executives within your own company or outside of your organization have responded to a crisis. What can you learn from their successes and failures? And what can you do when a crisis strikes to repeat their successes and avoid their failures?

Risk Management Best Practices

BILL YATES: Edward, this is so good. And I remember early on in the book, chapter three or chapter four, you go into the Boeing 737 example, and you talk about the company's response to that. And through that, you share steps to prepare to make sure that your response is timely, that it's quick. And this really hit home with me throughout the book, the sense of timing and the importance of that. And some of the notes that I made that you pointed out in the book, they go right along with the risk management practices that we do as project managers.

You talked about triggers. The project manager and the team, they should be looking for triggers for this risk or this crisis event. That's so important. We have to identify

those and track them. And then we have to have – I love this. You said, you know, practice scenarios. Let's practice the scenarios so we can see if our response plan is actually going to work.

And then to your point that you just brought up, paying attention. It's like we can't just do our risk management or risk analysis at the beginning of the project. Similar to crisis management, we have to pay attention. You talked about the "early warning system." what a great way to put that. Our project teams need to be on the lookout for those risks. And then having a response team to make sure that somebody on the team is not only looking out for these events, but they also know what they're supposed to do and what their response would be and who they're going to get to do what role in that.

A Crisis Spokesperson

And then the final piece, which I thought was unique for me – I hadn't had to do this before. You talked about the spokesperson. Maybe as the response takes place, you know, there's this crisis event or trigger, and we've gone through all these steps. Then who's going to speak about it? Who's going to bring it to the attention of the company or to the customer? Is it just going to be the project leader? Is it going to be the person who identified it? So, you talked about the need for spokesperson training. Because there are times when a company responds pretty well, but what they said publicly was not good. So, it undermined their effort.

I've seen project leaders do that, too, where they actually have a good game plan in place, but they're not sharing that effectively. So, they need spokesperson training. And as I look through that, there's triggers and practicing scenarios, paying attention,

having a response team, spokesperson training. Are there any of those that you want to elaborate more on as you think about some examples that you've shared?

Paying Attention

EDWARD SEGAL: Yeah, a couple I'd like to take a deeper dive in, in terms of paying attention. It's really important for companies, especially with the impact that social media has in a crisis, to pay very close attention to what others are saying about your company, your brand, your product, or your services.

And as I write in the book, the California Pizza Kitchen did an excellent job of that recently. They had a customer who ordered a delivery to her house, and they got the order wrong. She called to complain, and they kind of blew her off. So, she took to social media and complained. And California Pizza Kitchen apparently had what I call a "social media monitoring system" set in place. And they quickly discovered what she was saying. And they quickly responded, and they made things right for her. I think they gave her a gift certificate, and they sent her the right order.

BILL YATES: Yeah, like lifetime supply of mac and cheese or something. It was a great story.

EDWARD SEGAL: That's right. And that was such a great story that The Today Show did a story about it. And talk about turning a lemon into lemonade – I mix metaphors here – they knocked it out of the park. And I think this is a great lesson for all project managers. Make sure you have a system in place that's closely monitoring what's being said – the good, the bad, and the ugly – about your company and your products

or services. And just as important, have a way to respond if someone has a gripe, so you're dealing with it immediately, so it doesn't turn into a crisis.

Spokesperson Training

The other thing I like to take a deeper dive in is the importance of spokespersons. Now, depending upon the nature and size of a company and the organization, they may or may not have a PR person on staff or an outside PR consultant. And so, when a crisis strikes, they need to have someone who has had previous crisis management training, spokesperson training, so they know what to say and how to say it when a crisis strikes.

Sometimes I've run across this when I've trained people over the years. Salespeople will say, well, I'm in charge of sales for my company. I talk all the time. I can talk about any crisis. Wrong. Some of the worst spokespersons I've ever trained in my crisis management training have been salespeople. Why? Because they love to talk and talk and talk and talk.

And that's one of the challenges. When you're talking to the media, the rule of thumb is don't talk so much. You have to talk in sound bites. You need to know to quickly and effectively communicate the key message. And sometimes spokespeople, even trained ones, will do well when they get their initial message out, but they run the risk of tripping up when they're asked a question. And sometimes they get it wrong.

It's a great trick that reporters play, and I've done this before, is to ask a question and just leave silence. And nine times out of 10, people will feel compelled to fill the silence. And when they feel compelled to talk, they can actually trip themselves up by saying something they really didn't mean to do.

And that's really why crisis management spokesperson training is so important – not just once, not just twice, but on a very regular basis – to make sure that when, not if, a crisis strikes, they'll do the best possible job in sharing their company's side of the story. And because of the changing nature of crisis triggers these days, it's really important that each crisis communication training session, spokesperson training really incorporates the latest threat and how that company spokesperson would respond if that threat turns into a reality.

Clear Communication for PMs

BILL YATES: Yeah, that's so good. You know, for our project managers, they may be thinking, oh, that's not really applicable to me. But I would push back and say, yes, it's not just at a corporate level. It's also at a project level because things will go wrong with my project. And somebody on my team needs to communicate. It needs to be clear communication. Needs to be credible. It needs to be correct.

So, we have to really be careful about who we want that spokesperson to be with the client.

EDWARD SEGAL: And that's why sometimes the best spokesperson for a company is going to be a former journalist, because they'll know exactly what other colleagues could ask or would ask. And I think, importantly, that spokesperson should be an integral part and important member of the crisis response team so that, when that team practices responding to different crisis scenarios, this person will be completely in sync and onboard with not just how the company would respond, but what would be said about it.

A Crisis Response Team

And that raises another important point as to when a company should appoint a crisis response team. Too many organizations I've found will wait until there's a crisis before they'll appoint that team. Wrong. I think the team should be in place as soon as there is a plan in place, and the sooner the better for both because, with a plan in place, then the response team can hold practice sessions throughout the year on how they would respond and make sure it is a well-meshed, well-functioning team because, shocking to say this, but sometimes there are personalities.

BILL YATES: Yeah.

EDWARD SEGAL: And they – they don't get along.

BILL YATES: Exactly; right.

EDWARD SEGAL: You don't want, you know, finger-pointing and yelling and screaming and personality issues when there's a crisis on top of everything else. So, by having these regularly scheduled and sometimes surprise pop-up crisis management response scenario testing, that's a great way to make sure people can work well under pressure, under stressful situations. And that's a time, of course, if someone's not working out, then it's time to bite the bullet and to change the seats on the buses.

BILL YATES: Yeah, absolutely.

EDWARD SEGAL: Everybody will work well when a crisis strikes.

When is it a Crisis?

BILL YATES: Mm-hmm. That's so true. And right up front, we have to define with the customer what do they consider a crisis and something they really want to be notified of, and what is okay. What's below that Mendoza line, so to speak.

So, you know, that's one of the basics for a project manager is to first define with that sponsor, what do you consider a crisis? What do you want us to reach out to you immediately about, versus what are kind of ongoing issues and risks that happen on a day-to-day basis? Because once we've hit that threshold, then our level of communication needs to be really buttoned up.

EDWARD SEGAL: Well, in any crisis, I think there are some people that absolutely have to be notified about a crisis. Legal. HR. Depending upon the crisis, the insurance company. Maybe there's a union involved. Perhaps they should be included, as well. But also, it's important to identify the obvious crisis triggers in a company that's related to their business. If you're an airline, of course, possible crisis is going to be crash of an airline, or the tire blows out and there's an emergency landing, or, you know, it's a long list that could be specific to a company depending upon their profession or industry.

But then, of course, there's a wide range of crisis situations that could affect any company. Allegations of sexual abuse, fraud, embezzlement, those kinds of things that can happen anytime, anywhere, or any company. And then again, depending upon the nature of the crisis and who's affected by it, it would make a lot of sense to notify the stakeholders, boards of directors, customers, vendors.

And that's why, when you prepare a crisis management plan, make sure you know who has to be reached when, why, and how; and that you have their emails or phone numbers or whatever it is that you can get to them quickly, effectively, and let them know. Because the last thing you want these people who are affected by the crisis to learn about the crisis is on social media.

Respond Immediately

BILL YATES: This was one of my biggest takeaways from your book, Edward, was as a project manager I would tend to – I would see a trigger. I would see a scenario playing out. I would think, okay, I want our team to be able to get our hands around this and see how big this crisis is or see, you know, has this risk event occurred to a degree that we think it has before going to the customer, before going to senior managers to let them know what our plan was and all that.

And I think I tended to do that kind of from a standpoint of, I want to be able to answer all the questions they may have. I want to be able to, you know, make them confident that we're responding to this appropriately.

And one of my biggest takeaways from your book is, okay, the reminder that bad news does not get any better with time. The quicker that I can let them know that something has happened, the better. Hey, this has happened, we're going to take action. We're investigating further to figure out which is going to be most appropriate. But timing is so important.

Five W's and the H

EDWARD SEGAL: It's important that you respond immediately. You don't have to have all the answers, but at least you should have all the questions. In journalism, they call it the "five W's and the H" for a story – the who, the what, the when, the where, the why, and the how. And of the thousands of crisis situations I've studied over the years for my books and work for Forbes.com, that is the one thing all crises have in common, the details. The details matter.

And that's why when a crisis strikes, at least tell people what you know. And even if you don't know all the details, share that, as well. Because if you're quiet about that or any aspect of the crisis, you're creating a vacuum that others will be more than happy to fill, and you will immediately lose control of the narrative.

And that's really important in any crisis situation: control, control, control. And if you can't control the message, if you can't control the flow of information from your perspective about the crisis, then you're behind the eight ball, and it's very hard to get back on track.

So even if a holding situation, a holding statement, we're aware of, you know, X, Y, and Z. And as soon as we have details, we will share it with you. That could be enough as you scramble to find out the answers as to what happened and why, and then keep everybody that's affected by it up to date, and issue as many appropriate updates and additional details as appropriate.

Better Communication Strategies

WENDY GROUNDS: Do you have some other communication strategies that a project manager should prioritize during this crisis? Which is the best way that they can be communicating?

EDWARD SEGAL: Well, they should know ahead of time how to reach the people who would be affected by the crisis. And this gets back to what we talked about earlier. Know your place. If you're a project manager in a company of, let's say, 5,000 workers, and you're one of 30 project managers, you might be risking your career if you go right to the chairman of the board of directors. So, if it's a publicly held company, you go to a stockbroker and say, "Guess what I found out." You know, those career enders are ways to make a crisis worse.

So, the more you know about the crisis, the more you know your place in a crisis situation, the more that you can make sure you know your responsibility in a crisis, you're going to be lessening the chance that you're going to do or say something that could hurt your career or make the crisis worse.

It goes back to practice, practice, practice. Be aware, be aware, be aware. And if you follow those basic guidelines, you're dramatically decreasing your chance that you're going to put your career in jeopardy.

When to Speak Up and When to Let Things Go

BILL YATES: Edward, there have been projects that I've been leading where maybe we're in a larger meeting of the organization, and we hear somebody at the C-suite or

somebody at the VP level say something about our project that's just not right, you know, it's just wrong.

Or we're in a meeting with a customer, and it's an external customer, and they make a statement about our project, and it's not right; it's not accurate. There's a part of me as a project leader, I want to defend, I want to stand up and say, whoa, whoa, that's not right. Let's set the record straight.

But there are times when I think it's small enough, I just need to let it go. You know, I don't want to make a big deal out of something that doesn't need to be done. So, give us some advice as to how to know when to speak up and set the record straight and when to let things go when we hear false things said about our projects.

EDWARD SEGAL: The answer is always speak up. Always set the record straight because the longer information or disinformation is left uncorrected, the more likely it is it's going to become conventional wisdom. As trivial and insignificant as it might appear to be now, it could take on a life of its own, spread outside the organization, migrate to social media, be the basis of a news story, on and on and on. And that becomes a crisis, if it is not true.

And that's why, when you see something, when you hear something, if it's not right, do something and correct the record as soon as possible. And for what can be said or misstated on social media, it takes on a life of its own. And depending upon what's said or misstated, people might try to read something into it that's not there. So, if you hear something, say something, no matter how trivial, and no matter how far up or how far down the command chain. It's really important to speak up and make sure it doesn't go

any further. And if it's at all possible, correct the record so it does not become conventional wisdom.

BILL YATES: That's excellent.

An Example from Peloton

WENDY GROUNDS: Yeah, I'd love to be able to share one of your stories that you shared in the book with our audience. Do you have an example of a company that was perhaps too slow to respond and the fallout from that?

EDWARD SEGAL: Well, I think Peloton is a good example. They're known for making their great exercise equipment. And not too long ago they were told by federal authorities that a particular product was unsafe. And they really sat on that, even though they were warned about the danger of it. It wasn't until several weeks later that the company finally took action and recalled what was alleged to be, you know, dangerous or unsafe exercise equipment.

That created a different kind of crisis for the company because, after it came out that they were dragging their feet, the company took a hit to their image, their reputation. They put in the minds of customers or wannabe customers a serious doubt as to how seriously the company took the safety of their products and how forthcoming they would be if there was allegations of an issue, and what they would do to fix that issue. So, I think that's a great example. Don't let that issue become a full crisis. If you know there's a problem with your product, don't wait for someone else to point the finger.

A Crisis Management Plan

WENDY GROUNDS: Edward, another thing that we wanted to ask you about is you talk about the importance of a good crisis management plan. What are good things that a project manager should include in a crisis management plan?

EDWARD SEGAL: A crisis management plan should be customized and tailored for the specific needs of the company or organization. The good news is that there is a template that I'd be happy to share with all of your listeners that can be the basis of that plan. No matter what industry or profession they're in, this template can be ramped up or ramped down for their organization.

But one of the first things I deal with in this template is what's the crisis trigger? And again, it should be unique to the company or their industry or their profession, and whether it's things that could only happen to their company or things that could happen to any company, such as allegations of sexual abuse or lawsuits or strikes or things like that.

Another important category in any plan is what's going to trigger the plan. Who's responsible for saying, "We have a crisis, and now we're activating the plan." Another important category is who has to be told of the plan, whether it's the board of directors, HR, legal, IT, some of these crises will depend on who has to be notified, depending on what the crisis is. So again, you have to walk this through.

And the other thing I talk about in the plan, although it has dozens of categories, a basic thing is when was the last time this plan was updated? Account for the latest possible threat. And how often has it been tested? If someone had a crisis management plan,

say five years ago, and let it gather dust on the shelf, chances are pretty good it does not account for what happens if AI goes bad for the company. How could it go bad? Well, plagiarism. Depending upon AI for information when by all accounts AI is not 100% trustworthy. I use AI on a frequent basis. And at the bottom every answer said, “This may not be true,” or “This may not be accurate,” or “Mistakes may have been made.” So, consider the source. What’s the source of your information?

You have to make sure your plan is updated on a frequent basis to account for the latest threats. Who’s going to be notified about the crisis? You have to make sure you have their emails or their phone numbers or their websites, you know, the best way to reach out to them. And just the more they know about what could happen when a crisis happens and the steps they should take, the questions they should ask if they don’t have all the answers.

And that’s the premise of this template. You may not know everything when a crisis strikes, but the more you know and you can fill out now in this crisis management plan, then the better prepared you are when it does strike, and you can update the plan as you learn more information about the situation.

Get The Template

BILL YATES: What’s the best way for us to share that template?

EDWARD SEGAL: You can go to my website at crisiscasebook.com. And at the top of the navigation bar on the homepage, you’ll see a tab for “Free Crisis Management Plan Template.” Click on that, fill in the information, and almost immediately you will receive

the template. You can start filling out; share with your staff, your board of directors, the appropriate people; and update it when, not if, a crisis strikes.

BILL YATES: Ha ha ha, yes, that's good. Excellent. In your book, some other resources that you brought to my attention that I want to make sure we share with our listeners. Department of Defense has a portal, a website called [Pavilion](#). And we'll put that in the show notes, too, to make sure that our listeners can get access to that. What a great resource. They have checklists; they have spreadsheets. Whenever you say "checklist" to a project manager, they kind of perk up and go, "Ooh, let me see that."

So, there are some great things in there: giving advice, case studies, exercises; and, you know, how to prepare for a news conference; how to make sure that you're doing an appropriate evaluation after a crisis takes place. They have some good things there on that website we will share, as well.

EDWARD SEGAL: There's a lot of great free resources available to project managers. [FEMA](#) has a great resource so far. You don't know what the politicians might do. But they have a great website in terms of national risk assessment. And for weather-related crisis situations, depending upon what part of the country, it'll tell you what threats you might face from Mother Nature and recommendations on how to prepare for it. So, whether it's manmade or nature-made, there's a lot of resources available to help project managers be prepared as possible for the next crisis.

Get in Touch

WENDY GROUNDS: If our listeners have a question for you, if they'd like to reach out, is there somewhere they can do that?

EDWARD SEGAL: Operators are standing by to take their call. Yeah, they can send me an email to my name. It's Edward Segal Communications with an S, edwardsegalcommunications@gmail.com. Or to make it easier, they can go to my website at crisiscasebook.com, and there is a contact form where they can just fill that in, and I'll get their message right away. I'm more than happy to talk to any of your listeners on how I can help them or answer any questions about the book or anything that we talked about today.

BILL YATES: Fantastic. Well, the book is a great read. It's ideal for someone like me. They're short chapters, they're on point, they have a topic, and you give an example. So, each one, it's like a small case study on the downside if you respond too late, or the fallout if you share incomplete information. You know, then you give an example of a company and what they've done, very readable. I think our listeners are going to really enjoy getting their hands on that book and going over it.

EDWARD SEGAL: I also recommend they become a continuing education student of crisis situations. Pay very close attention to what's happening in the news. What can you learn from how well or poorly people and companies are responding to a crisis? And I write about new crisis situations all the time as a leadership strategies senior contributor for Forbes.com. So, I welcome them to follow me on Forbes.com. And I do a weekly podcast wherever podcasts are heard, and the name of the show is [The Crisis Management Minute](#). It's literally about a minute of my commentary on the latest advice in the news and what people can learn from it.

WENDY GROUNDS: Excellent. Thank you, Edward. It's so good to talk to you.

EDWARD SEGAL: Thank you, I enjoyed the conversation. Thanks again for the opportunity to be with you today.

Closing

WENDY GROUNDS: Thank you for joining us on Manage This. You can visit us at Velociteach.com, where you can subscribe to this podcast and see a complete transcript of the show.

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