Customer Escalation Protocol

Purpose

This protocol establishes a standardized approach for managing elevated customer issues that require intervention beyond standard support channels. The escalation process ensures timely resolution of critical customer issues while providing clear accountability and communication paths.

Escalation Definition

An escalation occurs when: - A customer issue cannot be resolved through normal support channels - A high-priority issue requires immediate attention - A customer explicitly requests escalation to management - A situation threatens customer retention or satisfaction - Service Level Agreements (SLAs) are at risk of breach

Escalation Levels

Level	Handler	Response Time	Update Frequency
1	Support Team Lead	2 hours	Every 4 hours
2	Support Manager	1 hour	Every 2 hours
3	Department Director	30 minutes	Every 1 hour
4	VP of Customer Success	15 minutes	As needed
5	C-Suite (COO/CEO)	ASAP	As needed

Issue Severity Classification

Severity 1 (Critical)

- System completely unavailable
- Data loss or corruption
- Security breach
- Issue affecting >50% of customer users
- Direct revenue impact >$10,000/hour

Severity 2 (High)

- Major functionality impaired
- Performance degradation affecting business operations
- Issue affecting 20-50% of customer users
- Workaround available but highly inefficient
- Revenue impact $1,000-$10,000/hour

Severity 3 (Medium)

- Non-critical function unavailable
- Intermittent issues with core functionality
- Issue affecting 5-20% of customer users
- Reasonable workaround available
- Minimal direct revenue impact

Severity 4 (Low)

- Minor bugs or UI issues
- Feature enhancement requests
- Documentation issues
- Issue affecting <5% of customer users
- No business impact

Escalation Process Flow

Step 1: Identification

When a situation meeting escalation criteria is identified: 1. Support agent classifies severity based on criteria above 2. Agent documents all troubleshooting steps already taken 3. Agent completes Escalation Request Form in Zendesk 4. Initial severity level determines automatic routing

Step 2: Notification

1. Escalation triggers automatic notifications to:
   - Appropriate escalation handler based on severity
   - Account manager for the customer
   - Support team lead
   - Escalation tracking team
2. For Severity 1 and 2 issues:
   - SMS alerts sent to on-call team
   - Slack alert posted to #customer-escalations channel

Step 3: Ownership

1. Assigned escalation handler acknowledges receipt within SLA timeframe
2. Handler reviews case details and confirms severity classification
3. Handler assumes ownership and coordinates response team
4. Incident created in PagerDuty for Severity 1 issues
5. War room established for Severity 1 issues (virtual or physical)

Step 4: Investigation and Resolution

1. Handler assembles cross-functional team as needed:
   - Technical support specialists

- Engineering resources
- Product management
- Infrastructure team
- Security team (if applicable)

2. Root cause analysis initiated
3. Regular updates provided to customer per frequency table
4. Resolution plan documented and communicated to customer
5. Implementation of fix or workaround

Step 5: Verification and Closure

1. Fix or workaround validated by:
   - QA team
   - Support team
   - Customer confirmation
2. Customer formally accepts resolution
3. Case resolution documented in Zendesk
4. Knowledge base updated with resolution details
5. Post-mortem meeting scheduled for Severity 1 and 2 issues

Escalation Paths by Issue Type

Technical Issues

1. Support Agent → Team Lead → Support Manager → Engineering Manager → CTO

Billing/Account Issues

1. Support Agent → Billing Specialist → Finance Manager → CFO

Service Delivery Issues

1. Support Agent → Account Manager → Customer Success Manager → VP Customer Success

Security Incidents

1. Support Agent → Security Team Lead → Security Director → CISO → CEO

Customer Communication Guidelines

Initial Response

For all escalations, the initial response must include: - Acknowledgment of the issue - Confirmation of issue severity and priority - Name and contact

information of escalation handler - Expected next steps and timeframe - Method and frequency of updates

Ongoing Updates

Regular updates should include: - Current status of investigation/resolution - Progress made since last update - Any new information discovered - Adjusted timeline if applicable - Next steps and when to expect another update

Resolution Communication

Final resolution communication should include: - Summary of the issue - Actions taken to resolve - Root cause (if identified) - Preventative measures being implemented - Any follow-up actions required - Request for customer confirmation that issue is resolved

Customer-Initiated Escalations

When a customer requests escalation: 1. Never refuse an escalation request 2. Capture exact concerns and desired outcome 3. Inform customer of escalation process and timeline 4. Notify account manager immediately 5. Document escalation request verbatim in case notes 6. Process through standard escalation workflow

Executive Escalation Procedures

For escalations reaching Level 4 or 5: 1. Executive brief prepared by Support Manager 2. Account history and context provided 3. Recommended action plan included 4. Executive communication templates available in Zendesk 5. VP Customer Success manages all executive communications

Post-Escalation Analysis

After each Severity 1 or 2 escalation: 1. Post-mortem meeting within 48 hours of resolution 2. Root cause analysis documented 3. Preventative action plan created 4. Process improvements identified 5. Lessons learned shared with support and product teams 6. 30-day follow-up scheduled with customer

Escalation Metrics and Reporting

The following metrics are tracked for all escalations: - Total escalations by severity level - Average time to resolution by severity - Escalation rate (% of total cases) - Customer satisfaction post-escalation - Repeat escalations by customer/issue - SLA compliance rate

Monthly escalation report reviewed by Customer Success leadership team.

Training and Resources

All customer-facing team members receive escalation protocol training: - New hire onboarding includes escalation procedures - Quarterly refresher training conducted - Escalation simulation exercises performed bi-annually - Escalation handling included in performance reviews

Contact Information

Escalation Team Contact List

Role	Name	Email	Phone	Slack
Support Team Lead	[Name]	support.lead@quantumdynamics.com	x5501	@supportlead
Support Manager	[Name]	support.manager@quantumdynamics.com	x5502	@supportmanager
Customer Success Director	[Name]	cs.director@quantumdynamics.com	x5601	@csdirector
VP Customer Success	[Name]	vp.success@quantumdynamics.com	x5701	@vpsuccess
Technical Escalation Engineer	[Name]	escalation@quantumdynamics.com	x5901	@escalation

For immediate assistance with escalation process, contact the Escalation Hotline at x5999.