

CUSTOMER ESCALATION MANAGEMENT

CUSTOMER OPERATIONS

PLAYBOOK

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Purpose

Single source of truth for triaging escalations, confirming facts, and sequencing communications so customers and leadership stay in sync. Use this document from first escalation signal through to resolution and post-incident review. All owners must be confirmed before the first customer update is sent.

Escalation Triage Checklist

INITIAL TRIAGE — complete within 15 minutes of escalation signal

- Confirm escalation is genuine (not a routine support ticket mislabelled)
- Identify the affected customer account and contract tier
- Assess business impact: revenue risk, SLA breach status, reputational exposure
- Assign Escalation Lead (single accountable owner)
- Open incident record and timestamp triage start

FACT CONFIRMATION — complete before any external communication

- Confirm root cause hypothesis (not assumption)
- Identify affected systems, services, or processes
- Establish timeline of events (use Section 03)
- Confirm current status: ongoing, contained, or resolved
- Get written confirmation from technical owner before stating facts to customer

Incident Timeline Stub

#	TIMESTAMP (UTC)	EVENT	CONFIRMED BY	OWNER
1		First signal / alert raised		
2		Escalation formally opened		
3		Triage completed		
4		Root cause identified		
5		Containment action taken		
6		Customer first notified		
7		Resolution confirmed		
8		Customer closure comms sent		
9		Post-incident review scheduled		

Stakeholder Grid

STAKEHOLDER	ROLE	CONTACT	UPDATE FREQUENCY	CHANNEL	OWNER
Escalation Lead	Single accountable owner		Continuous	Internal	
Customer Primary Contact	Day-to-day liaison		Per cadence	Email / Call	
Customer Executive Sponsor	Exec relationship		At key milestones	Email / Call	
Internal Engineering Lead	Technical resolution		Continuous	Internal	
Customer Success Manager	Account health		Per cadence	Internal + Customer	
Internal Exec Sponsor	Leadership visibility		At key milestones	Internal	
Legal / Compliance (if required)	Risk and contractual		As needed	Internal	

Scripted Update Cadences

CUSTOMER UPDATE — INITIAL NOTIFICATION

TEMPLATE — complete all fields before sending

Subject: [ACCOUNT NAME] — Escalation Opened: [BRIEF DESCRIPTION]

[Customer Name],

We are writing to confirm that we have opened a formal escalation in relation to [issue description].

Current status: [Ongoing / Contained / Resolved] Impact: [Describe known impact clearly and factually] Next update by: [Date and time — do not miss this commitment]

Escalation Lead: [Name, title, direct contact]

We will provide a further update by [time] regardless of progress.

Next update by: [Date and time — do not miss this commitment]

Owner: _____ Sent at (UTC): _____

CUSTOMER UPDATE — PROGRESS UPDATE

TEMPLATE — complete all fields before sending

Subject: [ACCOUNT NAME] — Escalation Update [#N]: [BRIEF DESCRIPTION]

[Customer Name],

Update as of [timestamp]:

Progress since last update: [Factual description only] Current status: [Ongoing / Contained / Resolved] Next action: [Specific action, owner, and ETA] Next update by: [Date and time]

Escalation Lead: [Name, title, direct contact]

Owner: _____ Sent at (UTC): _____

CUSTOMER UPDATE — RESOLUTION NOTIFICATION

TEMPLATE — complete all fields before sending

Subject: [ACCOUNT NAME] — Escalation Resolved: [BRIEF DESCRIPTION]

[Customer Name],

We can confirm that the escalation raised on [original date] has been resolved as of [resolution timestamp].

Resolution summary: [Concise factual summary] Actions taken: [List key actions] Preventative measures: [What has been put in place]

A post-incident review document will be shared by [date]. We welcome a call to walk through this at your convenience.

Escalation Lead: [Name, title, direct contact]

POST-INCIDENT REVIEW

Schedule within 5 business days of resolution. Attend with: Escalation Lead, Engineering Lead, CSM, Customer Primary Contact. Deliver written PIR to customer within 10 business days. Internal lessons-learned log to be updated by Escalation Lead.

Exec Readout — Companion Format

Use this section for internal executive briefings. Keep to a single page.

Account: _____

Escalation opened: _____ Resolved: _____

Severity definitions:

LEVEL	IMPACT CRITERIA
P1 — Critical	Complete service outage; revenue impact > £[THRESHOLD]; major customer SLA breach; regulatory or legal exposure
P2 — High	Partial degradation affecting multiple customers; measurable revenue impact; customer exec escalation required
P3 — Medium	Limited scope; single customer or internal impact; workarounds available; no immediate revenue risk

Severity: P1 / P2 / P3 (circle)

Customer impact summary (2–3 sentences, facts only):

Root cause (confirmed, one sentence):

Resolution actions (bullet list, max 5):

SLA status: Breached / Within SLA (circle) Breach detail: _____

Customer sentiment post-resolution: _____

Follow-up commitments and owner:

COMMITMENT	OWNER	DUE DATE