

# Escalation Playbook

### What is an escalation and when to raise it?

#### **Escalation**

(noun)

'an increase in the intensity or seriousness of something'

An Escalation is where an issue the customer is facing/bringing to use has intensified in seriousness, for us or the customer. Alternatively if the relationship has deteriorated significantly to increase the risk to Condeco

The Escalation process is meant for situations where all normal processes have been exhausted (or there is no process in place) and risk remains within a customer account.

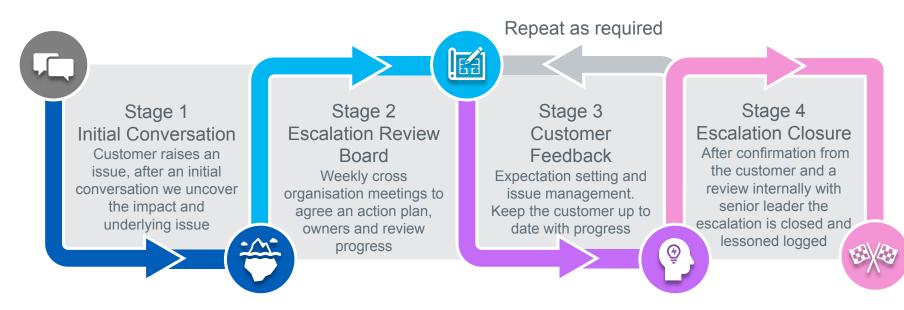
"The 15 minute rule" – Spend 15 minutes thinking over the problem and ask yourself if this is something you can resolve without help from leadership.

### Beat the escalation

'an ounce of prevention is better than a pound of cure' Benjamin Franklin

The best way to resolve an issue with a customer is to avoid it in the first place. This is accomplished through regular communication, identifying risk early, setting reasonable expectations and taking ownership of our actions for customers

### The four stages of an Escalation



### Stage 1 Customer conversation guidance

### Step 1

Make time for a full conversation with the customer



### Step 2

Listen. Relay back what you heard to make sure you understand



### Step 3

Consider the impacts and outcomes for the customer



### Step 4

Avoid the blame game





### Step 7

Send customer an email summarizing the situation and plan



### Step 6

Raise the escalation and brief the Regional Director



### Step 5

Demonstrate your commitment and book the next call

### Output:

- 1) Defined issue from the customer
- 2) Desired outcomes to reach

### Stage 2 The Escalation Review Board guidance





### Step 2 Ask for the help that you need.

Get them to the
Escalation
Review Board



### Step 3

Remember, we are all one company





### Step 7 Get written

Get written commitments from internal stakeholders



### Step 6

Always consider options for a plan B



### Step 5

Under promise with the intention to over deliver



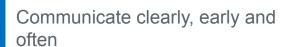
#### Step 4

Arrange phone calls or video meetings. Don't

### Output:

- Agreed actions and owners to find resolution
- 2) Dates/ranges to provide the customer







Establish a cadence of updates



Push back if something is not possible or doesn't help resolve the issue



Increase your availability and be proactive in your communications



Demonstrate progress on the agreed outcomes, even if its small

If not ready to close, repeat steps in escalation review board

Outcomes reached? Resolved and ready to close?

## Stage 4 Escalation Closure

#### Customer

Has the customer confirmed that the outcomes they wanted have been achieved? Have we fully resolved the issue that caused them to escalate?

#### **Resolution Owner**

Have we internally reviewed the output and agreed that this is a long term fix and not simply a temporary band aid on the problem?

### Leadership

Review the outcomes, customer (and resolution owner) feedback with regional and global leadership. Agree that a closure is appropriate

### Lessons/Take away actions

Are there any feedback lessons that we can relay into the wider business. Has our resolution stopped this for other customers? Do we need to review if anyone else is having this issue?