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The Escalation Playbook

Define when and how to escalate issues

Everything Becomes Urgent When Nothing Is Defined

THE PROBLEM

Most businesses have no escalation rules. So everything gets escalated to the owner, even things that could be handled by someone else.

The problem is not that people escalate too much. The problem is that no one told them when to escalate and to whom.

WHY IT HAPPENS

No one has defined what is urgent vs important. So everything feels urgent and gets escalated immediately.

The solution is not less escalation. It is clear escalation rules matched to severity levels.

Define your escalation rules. Urgency follows clarity.

The 3-Tier Escalation Framework

1
TIER

Low Severity: Handle Internally

Issues that can be resolved by the team member without approval. Examples: minor typos, formatting adjustments, routine requests. Response time: Same day.

2
TIER

Medium Severity: Escalate to Team Lead

Issues that require approval or guidance. Examples: client complaints, process deviations, budget questions. Response time: Within 4 hours.

3
TIER

High Severity: Escalate to Owner

Issues that impact business operations or reputation. Examples: legal threats, major client losses, compliance breaches. Response time: Immediate.

Escalation Triggers by Tier

TIER 1: HANDLE INTERNALLY

- Routine client requests
- Minor formatting errors
- Standard process questions
- Scheduled task updates

TIER 2: ESCALATE TO TEAM LEAD

- Client complaints or dissatisfaction
- Process deviations or exceptions
- Budget or resource questions
- Unclear instructions or priorities

TIER 3: ESCALATE TO OWNER

- Legal threats or compliance breaches
- Major client losses or cancellations
- System failures affecting operations
- Reputational risks or public complaints
- Financial discrepancies over $5,000
- Staff misconduct or safety issues

Your 45-Minute Implementation Plan

NEXT STEPS

1	List all issues that get escalated
2	Assign each issue to a tier (1-3)
3	Document escalation rules
4	Communicate rules to the team

TIME BREAKDOWN

Total: 45 minutes

Step 1: List issues (15 min)

Step 2: Assign tiers (15 min)

Step 3: Document rules (10 min)

Step 4: Communicate (5 min)

Common Mistakes to Avoid

WHAT NOT TO DO

Treating All Issues as Urgent

Not everything is urgent. Define what is Tier 1, 2, and 3 so the team knows what to escalate.

Not Documenting Escalation Rules

If escalation rules are not written down, they will be interpreted differently by everyone.

Escalating Too Early

If everything gets escalated, nothing is urgent. Teach the team to handle Tier 1 issues themselves.

Escalating Too Late

Waiting too long to escalate a Tier 3 issue can cause major damage. Define response times.

Not Defining Response Times

If you do not define how fast each tier should be handled, urgency becomes subjective.

Changing Rules Without Communication

If you change escalation rules, tell the team. Otherwise they will keep using the old rules.

Ready to Define Your Escalation Rules?

Download the Complete Templates

Get the complete 3-tier framework, escalation triggers, and response time templates.

Download templates →

Book a Strategy Call

I will review your current escalation process, design a 3-tier system, and show you how to reduce urgent interruptions.

Check to see if you qualify →

ABOUT REMOTEE

I help Australian businesses reclaim their time by building compliance-ready delegation systems. I do not just place people. I build the systems, train the team, and give you ongoing support.

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