

Support Escalation Playbook

Use this playbook to guide cases from intake to resolution, escalation and knowledge capture. Complete actual channels, service commitments and routes. Keep case ownership and customer communication explicit during every handoff, including collaborative support.

Complete bracketed fields with approved information. Duplicate modules and rows as needed; record the reason for any section marked not applicable.

Document [ID and revision] **Owner** [Role] **Scope** [Organization, site or product]

Effective date [Date] **Approval** [Controlled record] **Next review** [Date or trigger]

Support model

Model element	Adopted support arrangement
Scope channels and service hours	[Products, covered users, verified channels and time zones]
Working model and ownership	[Tiered, swarming or hybrid; case and customer-contact owner]
Roles and service commitments	[Responsibilities, authority and approved target references]

Intake and logging

Case intake form

Required field	Case record
Requestor and observed need	[Authorized customer reference; symptom in requestor words]
Environment and impact	[Product/version, affected users, scope and business effect]
Evidence and reproduction	[Exact error, steps, timestamps and sanitized attachments]
Work type and owner	[Incident or service request; responsible role and acknowledgement]

Classification and prioritization

Priority or category	Impact and urgency criteria	Target clock and rule
[Exact priority label]	[Approved definitions and matrix decision]	[Response/resolution target, clock start and exclusions]
[Case category]	[Criteria and routing]	[Policy and queue reference]

Service requests

Standard request	Prerequisites and fulfilment steps	Verification and closure
[Request name]	[Authorization, information and controlled procedure]	[Delivered result and customer confirmation]

Diagnosis and resolution

1. Search [approved knowledge sources] using the customer's symptom and environment.
2. Record [matched article], [applicability check] and [result] before proposing further changes.
3. Perform approved [diagnostic steps], record [observations] and separate confirmed findings from hypotheses.
4. Apply the authorized [resolution or labelled workaround], verify [result] and escalate if [adopted criterion] is met.

Diagnostic action	Expected or observed result	Decision and next step
[One approved check]	[Evidence and environment]	[If result then action; otherwise route]

Escalation

Escalation route matrix

Trigger and type	Destination and ownership	Handoff and acknowledgement
[Exact condition; functional or hierarchical]	[Team/role; what stays with case owner and what transfers]	[Required package, adopted response time and fallback]
[Swarm or collaboration trigger]	[How help is requested; continuing owner]	[Information, decision record and return route]

Handoff package

Required item	Evidence or current status
Case impact priority and environment	[Verified summary and case link]
Diagnostics and attempted resolution	[Actions, outcomes, logs and relevant knowledge]
Requested assistance and customer update	[Decision needed, current owner and next update]
Receipt and return conditions	[Receiving acknowledgement, actions and de-escalation criterion]

Major incidents

Coordination element	Approved rule and current record
Declaration and leadership	[Criteria, authority, coordinator and decision]
Roles and workstreams	[Technical resolution, customer contact and stakeholder coordination]
Communications	[Audience, approver, verified facts and adopted cadence]
Return to normal handling	[Recovery acceptance, case ownership and review trigger]

Customer communication

Repeatable update message

Message part	Approved template text or fillable content
Acknowledgement	[Confirm understood issue, impact and case reference]
Current status	[Verified finding, action underway and limitation]
Customer action	[Only required, approved steps and precautions]
Next update or resolution	[Approved expectation and communication owner]

Closure and knowledge capture

Closure check	Evidence and result
Resolution or workaround verified	[Check performed and actual result]
Customer confirmation and closure code	[Response, adopted closure rule and exact code]
Knowledge created or updated	[Reusable issue, environment, resolution and article link]
Ownership and open work	[Follow-up owner, problem record or remaining restriction]

Known issues and solutions

Repeatable problem solution article

Knowledge field	Reusable verified content
Issue and exact symptom	[Customer wording or error text]
Environment	[Applicable product, version and configuration]
Resolution or workaround	[Direct answer and ordered approved steps]
Cause	[Established cause; omit if unknown]
Verification and failed resolution route	[Expected result and defined escalation]

Review and improvement

Review or measure	Definition and evidence	Decision and action
[Case quality or outcome measure]	[Calculation, source, unit and adopted review frequency]	[Result, owner and improvement]
[Major incident or recurring issue]	[Timeline, handoffs, customer impact and cause]	[Corrective action and effectiveness check]

Route and content maintenance

Item reviewed	Verification result	Owner and next trigger
[Channel, hours, target or escalation route]	[Verified source and test date]	[Responsible role and change trigger]
[Known issue or message]	[Applicability, safety and exact template review]	[Version and owner]

- ☐ Priorities, clocks and escalation triggers match adopted service commitments.
- ☐ Every handoff identifies the continuing case and customer-contact owner.
- ☐ Resolution checks and knowledge articles exclude customer secrets and identifiers.

Review role	Date and decision	Approval and open actions
[Support authority]	[Approved or returned]	[Record and next review]