

Building Your Issue Escalation Plan



Things will go wrong in your business. We're human. Mistakes happen.

While we can't prevent mistakes from happening, we can set up processes so that they don't totally spiral out of control. The simplest way is to create an Issue Escalation Plan.

Like a fire escape plan, these issues addressed in the Issue Escalation Plan might not ever occur, but if they do, you'll have everything you need to respond with a cool head in the heat of the moment.

The structure of an issue escalation plan includes:

- What is the query or complaint a customer has?
- What is your public response to that person?
- What are your internal actions, or who needs to be notified when it happens (i.e. a specific department, team member—or even an external body, like the police)?

Possible 'emergency plans' could come up with responses for the following scenarios:

- You post a blog post about a sensitive issue and several people are offended
- Someone criticises your work and/or leaves a negative review online
- Someone does not respond well to your 1-to-1 email outreach
- Someone found your staff rude, racist, sexist or homophobic
- One of your products is faulty or broken

In the end, you want to respond with courtesy, kindness, and do your best to turn that person into an advocate. How would you respond if you were in their shoes?

A good rule of thumb when responding to these issues is to:

- **Yes, respond**—so future customers can see that you're a business that wants to make better experiences for customers, even if mistakes happen. Don't delete their post.
- **Acknowledge the issue**—let the customer know that their concerns have been heard. That's really what they are after here. Don't get defensive, just stick to

the facts. Planning responses to these scenarios in advance helps you diffuse defensiveness before it arises.

- **Express your values**—let them know that you strive for the best service, and want to leave them with a positive experience. In some cases, you might want to offer an apology or a refund, but this might not always be needed. Yes, it's possible you've messed up. That's ok. You're human. But for some people, being heard is all they are after.
- **Take it offline**— Offer to jump on a private message or on a call and talk it through. Provide a number and a name, so it's easy for them to get in touch. Connect with the human on the other end and help create a resolution that works for everyone.

Don't forget about planning for the good things! You might also want to include steps in your Issue Escalation Plan for things like a sales query or if someone writes a great post or comment—why not send them a voucher as a thank you?