

Time Management & Effectiveness

#5 ESCALATION

Michala Homolova



What is it?

Escalation is an act of informing people on the next (higher) management level about a problem or a situation, to get their attention and help.

When to escalate?

How to do it?



Activity 1: Assessments of ESCALATION

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From: Sales Manager

To: CEO

Cc: Superior of the Sales Manager

Subject: Escalation

Dear CEO,

it is becoming increasingly serious, Operations poor deliveries prevent me from generating revenues. Please take this as official escalation, it is unsustainable, I cannot control all the Operations deliverables.

Best regards

XY

Activity 2: Assessment of Escalation

From: Project Manager

To: Operations Director

Cc: empty

Subject: URGENT!!! Engineer needed

Dear Ops Director,

I urgently need an engineer for the completion of the YZ project. The engineer that is currently onsite fell sick.

Best regards

XY

Activity 3: Assessment

From: Engineer

To: Chief HR Officer (based in UK)

Cc: empty

Subject: Complaint

Dear James,

I want to escalate poor people management in Brno. I was sent a performance improvement plan that I don't agree with and I was told that it doesn't matter, it is still valid. I reviewed UK HR portal and no policy states this is true. Please investigate this 1st line manager's master-servant type of attitude towards my role in the organization.

Best regards

XY

When to escalate?

What things do you consider before you escalate?

What things do you consider when reacting to an escalation?

- Timing (not too early, not too late) BUT “bad news early”
- Heat
- Did you do maximum on your side?
- Addressed with competent person first?
- Choice of person to escalate to
- Hierarchy
- Clarity, specificity
- Image, perception, professionalism

- Urgency
- Empowerment of competent people (if you solve it on someone's behalf, what message do you send?)
- Did the person who escalated to you do maximum on his/her side?
- Addressed with competent person first?

Work in teams on the assigned examples: react to the escalation.

What are the possible reactions to an escalation?

All three examples are problematic. Imagine you were hired as a consultant to provide guidance in the first two scenarios.

Respond to the following questions:

Scenario I (slide 3):

- What should the CEO do?
- How should the Superior of the Sales Manager do?
- Provide an example to follow for the Sales Manager so she knows how to escalate next time

Scenario II (slide 4):

- Analyze what is wrong with this escalation

Good luck!

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- Questions
- Suggestions
- Discussion