

# TAKE IT TO THE TOP

*Done right, escalations are nothing to be afraid of.*

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**D**isagreement on projects is common—and it can even be beneficial, as both parties seek the best business outcome. However, when conflict resolution drifts and a person waits too long to escalate a problem or, worse, fails to do so altogether, the organization suffers.

Although none of these are acceptable excuses, the person may fear conflict or worry about burning a bridge, losing or looking bad. Or, they may be unsure of what's considered acceptable behavior.

Yet if handled properly, calling upon higher levels of project leadership or management is a healthy and essential part of any business. Escalations:

- Provide a check-and-balance mechanism to help ensure proper action
- Resolve problems early
- Help reduce frustration among project members
- Improve overall productivity by reducing rework
- Help prioritize work activities
- Encourage employee participation and problem ownership

## When the Time Is Right

Escalations can be a powerful tool, but team members and organizations should follow a few guidelines:

**1. Escalate only after a sincere attempt has been made to resolve the issue.** Escalation is not an excuse to avoid confronting someone. In most cases, the involved parties can reach an agreement and escalation won't be necessary.

**2. The dissenter typically is responsible for escalating the issue.** The exception is if the other party doesn't have approval over your work.

**3. Initiate the escalation within two workdays of knowing the problem is unresolvable at its current level.** It may be difficult to schedule immediate meetings with executives, but at least book time on their calendars.

**4. Escalate the problem, not the person.** Don't make the disagreement personal—it's business. Typically, neither

party is wrong. Each is championing a position from their perspective, as they should.

**5. Inform your manager prior to initiating an escalation.** If you're uncertain about the escalation process, confer with your manager or project sponsor. Make them aware of your intent. They may be able to help you in preparing your position, or they may wish to attend. If management doesn't support your position, however, be prepared that you might be directed to hold off.

**6. Inform other involved parties beforehand as well.** You want all parties prepared to ensure the escalation meeting is productive and focused on facts.

**7. While the escalation is underway, don't stop working the plan of record.** No one can predict for certain the outcome of an escalation, so it's typically best to keep everyone marching together until an official decision has been made.

## Up, Up and Away

Once an escalation is underway, how do you know how far up the management chain to take it? Continue escalating an issue until one of these conditions occurs:

- You obtain an acceptable resolution
- The head of both dissenting parties reaches a decision
- Your boss or a manager directly up your management chain directs you to cease escalating
- A decision is made by the project sponsor

As a leader of a project, program or organization, it's your job to ensure the people you depend on understand the business and mechanics of escalating. The process should be documented and appropriately taught.

Organizations can't avoid disagreements, but escalations can transform them into something productive. *PM*



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