ESCALATION TENETS

☑ Escalations are good business. If you owned the company, you would encourage their use.

☑ The project manager is responsible, near the start of the project, to ensure that an escalation process is defined and approved for the project.

☑ Managers typically decide the fate of escalations; they need to be principle players in escalations to help ensure that they maintain a sense of ownership and commitment for the contributions of their direct reports.

☑ Escalate only after a sincere attempt has been made to resolve the issue.

☑ The dissenter typically is responsible for escalating the issue, unless you are the dissenter and the other party doesn't have approval over your work; in this case, the other party must initiate the escalation.

☑ Initiate the escalation within two work days of knowing that the problem is unresolvable at its current level.

☑ Usually, neither party is wrong in an escalation; they both are doing the right thing based on their perspective.

☑ Escalations are not personal; they are an essential part of a healthy business environment. Escalate the issue, not the person.

☑ A person's professional maturity is on display during an escalation.

☑ Always inform your management (your manager) prior to initiating an escalation and obtain his or her approval to proceed.

☑ An escalation is a great tool for clarifying priorities.

☑ Project members must own their issues until they have personally driven them to closure.

☑ Surprising the other party in an escalation is not only unprofessional, but it can be a waste of time if the meeting must be rescheduled to continue when all parties can be better prepared.

☑ When an escalation is underway, do not stop working the plan-of-record.

☑ Once an escalation has resolved a problem, it's time to accept the decision and move on. Only if significant new information becomes available that could reverse the decision should the escalation be revisited. Otherwise, the issue should be considered closed.

☑ The project manager has a right to reopen a closed issue if the resolution to that issue impacts the project unfavorably.

☑ When taught properly, experience has shown that project members can be trusted to not overuse or abuse the use of escalations.

"Ideas to help you become more successful."