How to Escalate an Issue at Work? 4 Essentials

For start, you need to segregate issues into two categories:

1. One-Off Issues
2. Systemic Issues.

Each will require a different approach.

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1. One-off Issues

These are issues that pertain to a single transaction, a delay, an instance of non-revert, etc.

These can be solved by simply amending the 'Email Subject'.

Convey how the issue is affecting your work. The Email Subject structure has to thus become:

Category — Issue — Reason for Escalation

Some Examples:

- IRDA Staff - Not in 5 branches - will come in Audit Report
- Customer List - Await info - Reply to SEBI on hold!
- Ramsons Ltd - 5 Lac Loan Approval - Cheque deadline 20 min!

A subject like above (suffix at the end), unmistakably conveys, the issue will worsen if the person does not revert soon.

This will then make the counterpart reply promptly.

As an added benefit, subjects like these will prompt your boss to get involved and take over the baton from you; you won't have to specifically go and seek your boss's intervention.

2. Systemic Issues

A Systemic issue is one where you can't blame the individual.

You get an inkling of this from a couple of prior interactions with the counterpart.

In such cases, you will have to also focus on the real reason—the process, the system, etc. for long-term resolution. And to get your job done, you will have to proactively reach-in.

That means an Escalation Email which has the following 4 ingredients:

1. **A Strong Subject**
2. **Is High on Facts,**
3. **Is Low on Emotion (non-destructive), and**
4. **Has some Suggestions to solve the Issue.**

An Example

Imagine you are Head of Administration division in a company.

You notice a delay in the receipt of vendor payments (say demand drafts or DDs) from the operations team. You decide to escalate the issue.

(It is a systemic issue because it is not a one-off bill delay, but one that is seen in bills stretching over weeks.)

Your Email's 4 ingredients will be:

1. A Strong Subject

You send the email with the subject '24 Bills Pending - Over 25 days old - Business Suffering".

A subject like this indicates a systemic breakdown and will attract attention.

2. High on Facts

You list the 24 bills for which the DDs are to be received.

Contrary to this, typical escalation emails, initiated under stress, tend to highlight a couple of cases, and end with "Please urgently issue all the DDs pertaining to the Admin team". This approach then leads to a lot of ambiguity down the line on which bills are pending.

3. Low on Emotion

Instead of being destructive / judgmental in your email ("What is the issue?", "Once we send the bills, it becomes your responsibility to issue the DD within 5 days …"), you dispassionately highlight the effects of delay ("Due to delay in payment, vendors are delaying delivery of new equipment and services, which in turn is affecting other units in the company.")

This approach ensures the email doesn't degenerate into a blame game and the focus remains on solving the issue.

4. Suggest a Solution

a) You offer to rescan the 24 bills, to help the operations team to issue the DDs as a priority.

b) You request the operations team to evaluate publishing an MIS (management information system) every Friday, listing the bills pending, and reason for the delay.

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Escalation Skills increasingly play a role in how well you do at work.

As you get better at Escalation, you'll find yourself navigating the bottlenecks at work with ease - minimizing the need for time-consuming meetings and conference calls.

For more practical tips, explore my eBook: '28 Management Tips: There Is a Better Way to Do Everyday Work Situations.' Visit www.anilkaramchandani.com to learn more.