

Customer support ticket escalation

Manual | 11 steps | 3 roles | Created Sep 2, 2026 | Updated Sep 2, 2026 | v1

How a support team sets severity, escalates a stalled ticket, and brings engineering in on a customer issue.

TRIGGER

When a support ticket cannot be resolved by the agent who received it, or when it meets a severity threshold on arrival.

11 STEPS

1 Support Agent assigns a severity based on customer impact, using the written definitions rather than the customer's own wording.

- | Impact, not tone. An angry message about a cosmetic issue is not severity one, and a calm message about a data problem is.

2 Support Agent attempts resolution using the documented known issues and procedures, and records what was tried.

- | Record the attempts. Whoever picks this up next should not repeat them, and a repeated question across tickets means a missing procedure.

3 Support Agent checks the severity against the escalation criteria.

- | Resolvable at first line: Go to step 4: Support Agent resolves the ticket, tells the customer what was wrong, and records the resolution against the issue category.
Meets escalation criteria: Go to step 5: Support Agent escalates to the Support Lead with the severity, what was tried, and the reproduction steps.

4 Support Agent resolves the ticket, tells the customer what was wrong, and records the resolution against the issue category.

- | Categorise the resolution. Category counts are what tell you which documentation gap or product defect is costing the most support time.
Resolved: Ends the procedure
Reopened by customer: Go to step 5: Support Agent escalates to the Support Lead with the severity, what was tried, and the reproduction steps.

5 Support Agent escalates to the Support Lead with the severity, what was tried, and the reproduction steps.

- | Reproduction steps are the difference between an escalation and a forwarded complaint. Without them the next person starts from nothing.

6 Support Lead acknowledges to the customer within the response target for that severity, even without an answer yet.

Per the severity response target

Acknowledge on time regardless. Silence during an unresolved issue damages trust faster than the issue itself.

7

Support Lead determines whether the issue needs engineering or can be resolved at second line.

Second line can resolve: Go to step 4: Support Agent resolves the ticket, tells the customer what was wrong, and records the resolution against the issue category.

Needs engineering: Go to step 8: Support Lead raises it with Engineering On-Call, including severity, affected customer count, and business impact.

8

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Affected customer count is what lets engineering prioritise honestly between two escalations. One customer and forty look identical without it.

9

Support Lead provides the customer with an update at the interval promised for that severity, until resolution.

"Still investigating, next update in four hours" is a real update and it is what people actually want.

Resolved: Go to step 10: Support Lead confirms resolution with the customer, then records the root cause and whether documentation needs updating.

No progress past the next interval: Go to step 11: Support Lead re-escalates, raising severity or engaging the next level, and tells the customer it has been escalated.

10

Support Lead confirms resolution with the customer, then records the root cause and whether documentation needs updating.

If the answer existed but the agent could not find it, that is a documentation problem, not a training problem.

Closed: Ends the procedure

11

Support Lead re-escalates, raising severity or engaging the next level, and tells the customer it has been escalated.

A stalled escalation must have a defined next move, or tickets sit at second line indefinitely with everyone assuming someone else is on it.

Re-escalated: Go to step 9: Support Lead provides the customer with an update at the interval promised for that severity, until resolution.

ROLES INVOLVED

Support Agent

Support Lead

Engineering On-Call

REVIEW CADENCE

Twice yearly, and after any escalation that went badly or any ticket that stalled unnoticed.

Name the person accountable for this procedure before you put it into use.

CHANGE THESE BEFORE YOU USE IT

- Write your severity definitions with concrete criteria, since "customer impact" needs to mean something specific. This is the most important adaptation on this page.
- Set response and update targets per severity, and make sure they are achievable with your actual staffing.
- Name your real channels and tools. "Escalates to the Support Lead" is not followable at 2am without naming where.
- If you have contractual SLAs, align the targets here with them and check which take precedence.
- Add out-of-hours cover explicitly, including who is reachable and how, or the procedure silently only works during office hours.

This is a free starting point from sendabrief.com, not compliance advice. It is written to be adapted.

Source: <https://sendabrief.com/templates/support-ticket-escalation>