[Company name]

How to use this document: delete this paragraph before saving, sharing, or circulating it. Every part shown in blue is yours to replace: type your own details over each blue [field] until no blue remains. Then select all (Ctrl+A) and set the font colour to the same dark colour throughout. What is left is your finished document.

Customer Issue Escalation Form

Use this form when an issue cannot be resolved at the first point of contact. Complete it fully before passing the case on, so the receiving team does not have to ask the customer to repeat themselves.

Severity guide Choose the severity before escalating. If in doubt, choose the higher severity and explain why in the reason for escalation.

(1) Severity: Critical **- Meaning:** The customer cannot use the product or service at all, or there is a safety, legal, or serious financial risk.

First response target: _____

(2) Severity: High **- Meaning:** A major part of the product or service is unusable, or many customers are affected.

First response target: _____

(3) Severity: Medium **- Meaning:** The product or service works, but with a significant limitation or workaround.

First response target: _____

(4) Severity: Low **- Meaning:** A minor problem, a general question, or a suggestion, with no immediate effect on use.

First response target: _____

Case details: Case reference: _____ **Date escalated:** _____

Customer name: _____ **Customer contact details:** _____

Order or account reference: _____ **Escalated by:** _____

Escalated to: _____ **Severity:** _____ **Priority:** _____

Issue description Describe the issue in the customer's own words first, then add the facts the receiving team needs.

What the customer reported: _____

_____

_____

What was expected to happen: _____

_____

What actually happened: _____

_____

Impact: Who is affected: _____ **Since when:** _____

Other customers affected: _____ **Financial or service effect:** _____

Steps already taken List every step tried so far, including steps that did not work. Add rows for further steps.

Step tried	Date and time	Result

Reason for escalation and response needed: Reason for escalation: _____ **Response needed by:** _____

What the customer has been told: _____ **Attachments included:** _____

For the receiving team: Received by: _____ **Date and time received:** _____

Action planned: _____ **Resolution:** _____

Customer informed on: _____ **Closed by:** _____ **Date closed:** _____