**[A blue and white sign

Description automatically generated](https://www.smartsheet.com/try-it?trp=12107&utm_source=template-word&utm_medium=content&utm_campaign=Customer+Service+Escalation+Matrix-word-12107&lpa=Customer+Service+Escalation+Matrix+word+12107)Customer Service Escalation Matrix**

As a representative of our company, always remember to:

* **Maintain Politeness**: Always address the customer respectfully, using courteous language.
* **Listen Actively**: Ensure that you fully understand the customer's issue before responding.
* **Stay Professional**: Keep a calm demeanor, regardless of the customer's tone or frustration level.
* **Provide Clear Information**: Communicate solutions and procedures clearly and concisely.
* **Follow Up Promptly**: Ensure timely follow-up on any commitments made to resolve the issue.

These steps and reminders should help guide your customer service team through typical interactions and escalations, ensuring a professional and effective response to customer needs.

**Customer Calls into Call Center**

**Greet and Identify**:

Politely greet the customer and confirm their identity and account details.

**Document Issue:**

Document the issue thoroughly in the customer service system.

**Assess Issue:**

Perform an initial assessment of the issue to determine if it can be resolved immediately.

**Attempt Resolution:**

Try to resolve the issue using the resources and guidelines available.

**Determine Escalation Need:**

If the issue cannot be resolved, decide on the appropriate next step for escalation.

**Manager Takes Over Phone Call**

**Review Issue:**

Before taking over, review the customer's problem and the actions taken by the customer service representative.

**Introduce Yourself:**

Politely introduce yourself to the customer as the manager taking over.

**Reassess the Situation**:  
Evaluate the issue with fresh perspective and consider alternative solutions.

**Propose a Resolution:**

Offer a new solution or compromise to resolve the customer's complaint.

**Escalate If Necessary:**

If the situation remains unresolved, prepare to escalate further to the supervisor.

**Supervisor Reviews Complaint**

**Review Comprehensively:**

Examine the entire customer interaction history and the steps taken by the manager.

**Contact   
Customer:**

Contact the customer directly to discuss their concerns and gather additional feedback.

**Strategize for Resolution:**

Develop a strategic approach to address the complaint, potentially involving other departments.

**Implement Solution:**

Execute the resolution plan, ensuring all necessary actions are taken to satisfy the customer.

**Close and   
Follow Up:**

Confirm that the issue is resolved to the customer’s satisfaction and schedule a follow-up to prevent recurrence.

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