SOP: Post-Escalation Review and Feedback Collection

This SOP details the process for **post-escalation review and feedback collection**, including conducting thorough assessments of escalation incidents, gathering feedback from involved parties, analyzing the effectiveness of the resolution, identifying areas for improvement, documenting lessons learned, and implementing actionable recommendations. The aim is to enhance future escalation handling, promote continuous improvement, and ensure customer satisfaction through systematic review and feedback integration.

1. Purpose

To ensure systematic review and feedback collection after escalation incidents in order to improve processes, enhance escalation management, and increase customer and stakeholder satisfaction.

2. Scope

This SOP applies to all team members involved in escalation resolution, including managers, support staff, and any individuals whose input aids in reviewing and refining escalation procedures.

3. Responsibilities

- **Escalation Owner:** Initiates and coordinates the review and feedback process.
- **Support Staff:** Provides details and context for the incident.
- **Quality/Process Manager:** Documents findings and ensures follow-up on improvements.
- **All Participants:** Provide honest and constructive feedback.

4. Procedure

1. **Incident Assessment**
   - Gather all relevant documentation related to the escalation (tickets, emails, chat transcripts, etc.).
   - Summarize the issue, actions taken, and resolution outcomes.

2. **Post-Escalation Review Meeting**
   - Schedule a meeting with all key stakeholders within five business days of resolution.
   - Present a timeline and detailed account of the escalation.

3. **Collect Feedback**
   - Distribute feedback forms or conduct direct interviews with stakeholders and, where appropriate, customers.
   - Gather feedback on:
     - Communication effectiveness
     - Resolution timeliness
     - Collaboration and teamwork
     - Customer impact and satisfaction
     - Suggested improvements

4. **Analyze and Document**
   - Analyze feedback and meeting notes to identify root causes and key learnings.
   - Document all findings, lessons learned, and action items in a shared knowledge base or report.

5. **Develop and Implement Recommendations**
   - Create actionable recommendations for process improvements.
   - Assign responsibility and set deadlines for implementation.

6. **Communicate Outcomes**
   - Communicate lessons learned and process updates to all relevant parties.
   - Track improvements and revisit as necessary to ensure effectiveness.

5. Documentation & Records

- Escalation Review Meeting Minutes
- Feedback Forms or Interview Summaries
- Post-Escalation Review Report

- Action Item Tracker

6. Review & Continuous Improvement

- Quarterly review of escalation reports to identify trends.
- Regular updates to escalation and feedback SOP based on findings.

7. Appendix

Document	Description
Feedback Form Template	Standardized form to capture stakeholder and customer feedback post-escalation.
Review Report Template	Template for summarizing findings, lessons learned, and actionable recommendations.
Action Tracker	Tool to monitor implementation of process improvements.