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An escalation process for agency teams, so fewer questions reach the owner

By Ross Brown, FlexOps

An escalation process is a simple way to filter what needs the owner and what doesn't. The team sorts each problem or question into 1 of 3 types before it goes anywhere, tries 4 things themselves, and saves the non-urgent ones for a weekly Q&A, so that over time they solve more on their own and you get back to the work only you can do.

Read this online at flexops.co/resources/escalation-process-for-agency-teams

When an agency needs this

The most common thing I hear from owners on this is, "People keep bringing me questions, and I don't think I should be the one they're going to." It's very common, and it happens because there's a lack of structure and process around escalations and questions inside the agency.

It's one of the earlier things I'll typically do with an owner, because they usually aren't thinking about it systematically. They're thinking about it in terms of how they feel, which I understand, but it doesn't show you where the questions are coming from or why.

What happens without it is that the owner gets pulled in too often, by a wide range of questions and problems that are brought to them in an unstructured way. It drags them into the weeds, and it slows progress across the agency on the things only they can work on, which are usually sales, strategy and key client work.

I think the fix comes in 2 parts. The first is a process, which covers escalations (usually client problems that a team member can't resolve) and general questions about the business, priorities and tools. The second is a stronger culture, where you encourage and help the team to become problem-solvers, and set clear expectations for how everyone works day to day, owners included.

Step 1: sort it into 1 of 3 types

The aim is to reduce the number of escalations over time. So when someone thinks they need help, they sort it first.

Type	What it is	What happens
Type A	It's urgent, because it affects revenue, deadlines or client relationships.	Escalate it.
Type B	It's important, but it isn't urgent.	Log it, and save it for the weekly Q&A.
Type C	It's neither.	Handle it, by working through step 2 before it goes anywhere near the owner.

Step 2: try 4 things before escalating

For a Type C, there are 4 things to try, in this order.

1. If you know what to do, do it.
2. If you're stuck, research it. Look in the documentation, the SOPs, the chat history and your inbox.
3. If you're still unsure, ask a colleague, either in a 1:1 or in the group channel.
4. If you're still stuck after that, escalate it.

What to put around the process

There are 4 things I'd put in place around it.

- **A gatekeeper.** Ideally a senior or mid-senior person who isn't the owner handles escalations. That's less likely to be possible with a team of under 10.
- **A weekly Q&A.** This is where you work through the Type B items that were logged that week.
- **A general "Questions" channel** on Slack or Teams, for things that don't relate to clients. It isn't the place for Type A, B or C items.
- **A count of escalations per person**, so you can see whether they're going down or going up.

Why things end up with the owner

In my experience there are 2 common reasons things get escalated to the owner when they don't need to be.

The first is a fear of getting something wrong. That's often a result of perfectionism in the business, or of a track record of the owner changing work before it goes to the client. What I'd shift to is treating mistakes as lessons. They aren't a problem, provided you learn from them and don't repeat them, and they have to happen for the team to get better.

The second is not being able to find the answer and not knowing where to turn, because the knowledge sits in the owner's head. What I'd shift to there is a team that supports each other, solves problems without the owner, and spots where the documentation or the processes need improving.

Making it stick

This is where values come in. If you don't have values and principles for the agency yet, this is a good reason to set them. If you do, at least 1 of them should relate to solving problems and learning from mistakes, and all of them should be used when you measure how people are performing.

I measure people on skill, will, fit and ambition, and fit is the one that asks how well a person reflects the values and principles of the business. The team performance matrix sets out how to score all 4.

Where owners get this wrong

The main one is dealing with it by feel. If you only know that you're being asked too many questions, you can't tell who is asking, what they're asking about or why, so I'd count them before changing anything.

The other is answering the question anyway. If someone skips the steps and you give them the answer, I think you've taught them that the process is optional, so it's worth sending them back to step 2 even when answering would be quicker.

Questions owners ask about this

Why does my team keep asking me questions they could answer themselves?

It tends to be 1 of 2 things. Either they're worried about getting it wrong, or they can't find the answer because it only exists in your head. I'd find out which it is before changing anything.

What should be escalated to the owner?

Anything urgent that affects revenue, deadlines or a client relationship. Important things that aren't urgent can wait for a weekly Q&A, and everything else should go through the 4 steps first.

Who should handle escalations if it isn't the owner?

Ideally a senior or mid-senior person in the team. If you have fewer than 10 people that may not be possible yet, and it will probably still be you for now.

How do I know if it's working?

I'd count escalations per person each week. If the numbers are coming down over a couple of months, it's working.

If you'd like a hand with it

This is the kind of structure I build with agency owners so that the agency can run without them. If you'd like to talk it through, drop me a note or, by all means, book a call. You can also see how dependent the agency is on you with the Agency Health Check, and the agency owner's role audit is a good next step if a lot is landing on you.