

Escalation Triggers & Chain

This page defines all escalation triggers and the escalation chain at Crowned Credit — covering when to escalate, who to contact, response time expectations, and resolution tracking.

This page defines the complete **Escalation Triggers and Escalation Chain** for Crowned Credit Customer Service. Every CSR must know when to escalate, who to escalate to, and how fast to act. Proper escalation protects the client, the company, and the CSR. When in doubt, escalate. It is always better to involve leadership on something small than to mishandle something significant.

The Escalation Principle

Escalation is not a sign of failure - it is a sign of professionalism. The escalation chain exists because certain situations carry legal, financial, or reputational risk that exceeds the authority of a frontline CSR. Knowing the boundaries of your role and escalating appropriately is one of the most important skills in this job.

Immediate Escalation Triggers (Same Response - Do Not Delay)

These situations require escalation within the **same response or call**. Do not wait. Do not try to handle it alone. Tag Team Lead immediately.

Trigger	Escalate To	Reason
Client threatens chargeback or bank dispute	Team Lead then Manager	Financial risk plus potential CROA issue
Client mentions attorney, lawsuit, or legal action	Manager then Jethro	Legal exposure requiring executive response
Client threatens BBB complaint or regulatory filing	Team Lead then Manager	Serious reputation and compliance risk
Client is verbally abusive or making threats	Team Lead immediately	Safety, HR, and liability issue

Trigger	Escalate To	Reason
Client reports fraud or unauthorized charges	Billing (Khryzza) plus Manager	Financial accuracy and legal obligation
Client requests a refund	Team Lead then Khryzza	Refund policy review is required before any commitment
Duplicate charge confirmed	Khryzza (Billing) immediately	Must be voided and corrected same day
Client threatening social media post or public review retaliation	Team Lead then Manager	Reputation management and brand protection
Client reports someone else used their information to sign up	Manager plus Jethro immediately	Potential fraud, legal obligation to investigate

Same-Day Escalation Triggers (Not Emergency But Must Be Handled Today)

Trigger	Escalate To
Payment extension beyond 7 days requested	Khryzza (Billing Lead)
Client asks to change billing plan or pricing	Khryzza plus Team Lead
Client asks about reactivation after 2 or more months	Khryzza for invoice setup and new onboarding
Client has 3 or more unresolved complaints in a single conversation	Team Lead
Client asks technical credit questions beyond CSR knowledge	Credit Case Specialist
Dispute result appears to have an error (wrong items listed, wrong amounts)	Dispute Team Lead
Client has not been responsive for 30 or more days	Team Lead for re-engagement strategy

Escalation Chain - Who Does What

Level	Role	Handles	Contact Method
Level 1	CSR	All standard requests, scripts, and routine client questions	GHL chat, SMS, phone
Level 2	Team Lead	Complaints, unhappy clients, pre-approval for refunds, serious concerns	Discord DM plus GHL note
Level 3	Manager or Khryzza	Billing disputes, refunds, payment plan changes, chargebacks, legal threats	WhatsApp group chat plus Discord
Level 4	Jethro (CEO)	Legal threats requiring executive decision, major refunds, media threats, suspected fraud	Direct message to Jethro immediately

How to Escalate - Step by Step

1. Stay calm with the client. Do not show panic or uncertainty.
2. Tell the client: "I want to make sure this is handled at the right level. Let me loop in [Team Lead / Billing / Manager] right now."
3. Send the client a holding message if on SMS or email
4. Open the team Discord channel and post the escalation with: Client Name, Issue Summary, Urgency Level (Immediate or Same Day), and your name
5. Add a GHL escalation note using the template below
6. Set a GHL follow-up task for 2 hours from now to confirm the escalation was picked up
7. Do not close the conversation until you confirm the escalated team member has acknowledged it

CSR Holding Scripts During Escalation

SMS - Holding Message While Escalating

“ Hi [Name], I completely understand your concern and I want to make sure this is handled properly for you. I am looping in our [billing team / team lead / manager] right now to review your account. They will be in touch with you within [1-2 hours]. Thank you for your patience - we take this seriously.

Phone Script - Holding While Escalating on the Same Call

“ I completely understand, [Name], and I want to make sure the right person handles this for you. Can I put you on a brief hold for just 60 seconds while I get our [team lead / billing lead] on the line? I want to make sure you get the best answer right now. [Hold - contact escalation person - return.] Thank you so much for holding. I have [Name] joining us now to help address this directly.

GHL Escalation Note Template

“ **ESCALATION** - [DATE] [TIME]
CSR: [Your Name]
Issue: [Brief description in 1-2 sentences]
Client Said: [Exact quote if threatening or important to document]
Action Taken: [What you said and did before escalating]
Escalated To: [Name and Role]
Urgency: IMMEDIATE or SAME DAY
Status: PENDING
Next Step: [What should happen next and by when]

Response Time Standards by Escalation Level

Level	Role	First Response SLA	Resolution Target
L1 - CSR	Customer Service Rep	SMS: 15 min / Email: 2 hrs / Phone: answer or callback in 1 hr	Standard issues resolved on same contact
L2 - Team Lead	Team Lead	15 minutes after escalation notification	2 to 4 hours from escalation

Level	Role	First Response SLA	Resolution Target
L3 - Manager or Billing	Khryzza or Manager	30 minutes after escalation notification	Same business day
L4 - CEO	Jethro	As soon as possible	Judgment call based on complexity

Never Leave a Client in Silence

No matter the escalation level, never allow a client to go more than **4 hours without an update** during business hours. Even if you do not have a resolution yet, send a check-in message:

“ Hi [Name], I just wanted to let you know we are still actively working on your concern and have not forgotten about you. I expect to have an update for you by [specific time]. Thank you for your patience - we appreciate it!

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