White Paper

Developing a Customer Assurance Program from Start to Finish

Best Practices from Cisco's Award-Winning Customer & Partner Assurance Organization

Today's global enterprise IT environments are large, complex and cutting-edge. Failures caused by external events such as natural disasters or by internal events such as equipment or process breakdown are inevitable. Such failures, regardless of cause, have the potential to damage customer confidence and your brand; with a common adopted process to manage these escalations, you can ensure that your customer experiences minimal impact to their business operations.

When a customer problem escalates and the relationship begins to degrade, that account (and how you manage it) becomes critical. Customers, plus internal stakeholders, are counting on you to deal with an IT failure as it unfolds. How you approach the crisis will set the tone for how effectively the situation is handled. Are you prepared to act? Do you have an escalation management team in place? Is there a consistent process and enabling tool to track and manage the problem quickly and efficiently? Are all teams working from established best practices?

Working side by side with our customers around the globe for more than 20 years, Cisco has seen almost every kind of escalation imaginable. Based on this experience, we've built a strong foundation of best practices for escalation management. We've also capitalized on insights gained from critical encounters to extend beyond a merely reactive approach to one that helps predict and prevent future customer issues—turning a customer crisis into a competitive differentiator.

The Cisco Customer Assurance Program (CAP) delivers on Cisco's promise to focus intensely on customer success, while continually evolving to stay ahead of customer and industry transitions. Our CAP reactive teams resolve the most critical customer issues when normal channels don't produce expected results. The team is successful in large part because of a "do whatever it takes" attitude underpinned by a well-established, measured and repeatable process.

Cisco CAP methodologies have set the standard for other companies to follow. We've been recognized by Harvard Business Review, CIO Magazine and the 2013 Technology Services Industry Association (TSIA) Star Awards for our relentless focus on customer success. We've trained other companies to establish and successfully run their own escalation programs, and we help lead industry forums on inter-company collaboration, best practices and industry certification.

This white paper presents five best practices for building a customer assurance program. We hope that they help to inform your own escalation approach and prepare you for you're the most challenging of customer situations.

Starting the Journey of Effective Escalation Management

We began our own Customer Assurance Program journey in the 1990s, when we were noticing patterns of critical events that were seriously impacting our customers and affecting our business relationships with them. We put a team in place to resolve these critical issues and better understand why and how these situations escalated. From there, the program expanded to have global coverage and a process to ensure we incorporated lessons from the escalations into company-wide practices.

You may be at the starting point of developing your Customer Assurance Program or you may be further along the path. Either way, these best practices will help you establish a new program or refine your current one.

Five Best Practices for Critical Situation Response

In addition to helping you to prepare for worst-case scenarios, a straightforward, comprehensive Customer Assurance Program can be an invaluable tool for identifying and addressing systemic issues that inhibit your customers' success and introduce complexities in your business.

These five best practices are ordered chronologically and build on one another. As you work on the tasks involved in one best practice, you will be constructing the foundation for the next.

Best Practice #1: Create a Successful Escalation Management Framework

Best Practice #2: Develop Clear Team Roles and Responsibilities

Best Practice #3: Define a Critical Situation Process

Best Practice #4: Manage a Successful Critical Response Situation

Best Practice #5: Evolve to a More Proactive, Preventive Model

Best Practice #1: Create a Successful Escalation Management Framework

Critical escalations tend to be cross-functional, highly visible and often stressful in nature, and they are rarely resolved successfully without visible senior executive support. The nature of critical escalations also requires that the team has a strong reputation across the organization that escalation managers can leverage to effectively call “all hands on deck”.

The escalation management process is not meant to be a way to deflect blame or shift responsibility away from any individual or team. Instead, ownership of issues remains consistent even during critical situations. Escalation management (EM) is simply a mechanism to achieve success by focusing the company’s resources on the crisis at hand. As a starting point, you need to look at your company culture, level of executive sponsorship during crisis situations, and what kind of accountability principles you have in place. The next two sections break down our first best practice into two vital tasks.

1A: Assess Your Company’s Customer-Centric Culture and Determine How to Change It

Understanding your company culture and how people in charge react under pressure can help you determine how much groundwork needs to be done before your company can successfully adopt an EM best practices program. You might start by asking yourself these questions:

- Does my company espouse and actually demonstrate a can-do attitude?
- Is our CEO ready to commit any company resources necessary to resolve a critical customer situation, no matter where the incident occurs?
- Are our company managers willing to change business and operation priorities for the duration of the critical situation response, and even beyond, if it prevents future critical situations from reoccurring?

If you hesitated to respond “yes” to these questions, you’ll first want to focus on cultivating a customer-centric culture within your company. The characteristics of a customer-centric culture can be specific to each organization, but we believe there are three essential components:

- **A strong, customer-centric vision:** Your company’s vision should be clear, concise, and should explicitly recognize the ultimate purpose of serving your customers. The values you attach to that vision should reinforce the importance of your customers and your employees (see “Employee engagement” below). The company’s vision and values need to be simple enough, and repeated often enough, that every single employee knows what they are and buys in to their significance as the guiding principles for your business. To drive the vision home, the company’s senior leadership must present a united front and their actions must match the cultural vision. Develop leadership messaging, training, and tools to arm company leadership for this mission and to ensure they take a consistent approach.
- **Employee engagement**: Numerous studies have shown that strong employee recognition and empowerment leads to excellent customer experiences. After all, you can’t have a customer-centric culture unless your employees are bought in too, and they’re much more likely to be bought in if they a) feel valued for the work they do and b) feel empowered to make choices that positively benefit the customer. Here are some ways to foster a customer-centric culture at the employee level:

- Train employees on the core values and what it looks like to carry them out at your company, with a special focus on emphasizing the culture during new-hire orientation.
- Provide leaders and management with tools to “check-in” periodically with employees to ensure that the message is still resonating with them, that they’re making it a priority, and to capture employee feedback.
- Offer award programs and peer recognition systems to recognize employees who demonstrate the right customer-centric behaviors.
- Place physical reminders around the workplace – whether it’s employee badge cards, posters, digital signage, etc.

- **Robust customer listening:** A listening strategy that effectively captures the customer’s end-to-end experience.
  - Include the ability to process multiple streams of customer feedback to comprehend their experience with your company in order to prioritize customer pain points.
  - A closed-loop feedback process so customers recognize that you heard them and understand what you are doing as a result.
  - Regularly conduct journey mapping exercises to understand how their work fits into the customer’s end-to-end experience, or use customer / end-user personas to ensure that new projects address actual customer needs.

A customer-centric culture is one very important piece of this puzzle, but it alone can get an organization only so far in delivering an excellent customer experience. Also required are processes and operations that minimize complexity and effort for customers, even if it means more work for your organization. And none of this matters, of course, if you don’t build this upon a foundation of product design and development that puts customer expectations and ease-of-use first.

The benefits of a customer-centric culture clearly extend well beyond an EM process, but we believe it is a fundamental requirement for an EM process to function effectively and have maximum impact. It takes a great deal of work and ongoing discipline to instill and sustain a customer-centric culture where one doesn’t exist, but, once in place, these behaviors can transform your organization.

Arm Your Managers with Tools to “Check in” on Your Customer-Centric Culture

An organization’s Human Resources department is often the source of tools and techniques that enable leadership to gauge the success and reach of a customer-centric culture effort with employees. If that isn’t the case in your company, you can work to implement these ideas within your division at a grass-roots level, and/or influence your Human Resources department to support it more broadly across the company. These tools can help to identify opportunities not only to drive the concepts home with employees, but potentially to alter the approach as needed based on employee feedback:

- Regular employee engagement surveys to capture how employees are responding to and embracing the culture (among other topics)
- Standardized content and reminders for management to use in team meetings to quickly and consistently reinforce the core cultural components
- Established goals as a formal part of the company’s performance evaluation system to gauge an employee’s individual effort in supporting the culture

1B: Establish Top Executive Ownership

Company-wide executive buy-in is the single biggest factor for ensuring the adoption of an EM process. It will go nowhere without wholehearted support from the top. For example, at Cisco, our resolution team leaders have a direct dotted-line reporting relationship to our CEO Chuck Robbins, who takes the time to listen to voicemail reports for each existing critical account every day.

Your entire company needs to understand that effectively combating widespread crisis situations takes extra-ordinary measures by personnel and resources. We’ve found that everyone must be willing to do whatever it takes to tackle an emergency situation, learn from it and implement necessary systemic changes.

Three things to consider:

- Make sure your program has full visibility and support at the highest levels of the corporation and resolution team leaders have direct access to the CEO.
- Make sure your executives, from the CEO on down, acknowledge your EM team's authority to mobilize significant company resources as necessary.
- To ensure support and prevent duplicate efforts, everyone should understand and acknowledge that the EM response program is the official way the organization addresses critical situations.

Best Practice #2: Develop Clear Team Roles and Responsibilities

Given the cross-functional and highly variable nature of most critical escalations, it's important to establish roles, responsibilities, and expectations for those who will oversee and support their resolution.

To ensure continuity, every critical issue needs the following three team components, described in detail in the following pages:

- A resolution leader (RL)
- An executive sponsor
- A critical response resolution team

2A: Resolution Leader

The resolution leader plays the most critical role in resolving the critical issue. He or she is responsible for overall management of the situation, identifying systemic issues and reporting to executives. The RL also has the authority to mobilize any necessary resources to resolve the critical situation.

This person sets the example and tone by establishing an appropriate sense of urgency and follow-through on commitments. It is his or her job to create an action plan and identify specific owners to ensure clear responsibilities and timelines. While the RL does not own all the actions, he or she ensures that the correct resources do own actions and drives those actions to closure. The RL needs to understand the business impact to participating organizations and show empathy, but stay clear and firm on expectations.

Other responsibilities of the RL include:

- **Assembling the team.** The RL identifies representatives from organizations such as sales, development, support, and finance, who will play a part in clarifying and resolving the issues at hand. Once these people are identified, the RL gathers them together as a team to gather data, determine root causes, and coordinate activities to drive resolution.
- **Driving action and communication plans.** The RL employs project management techniques to identify key deliverables, establish a timeline of activities, monitor progress, manage risk, and communicate to stakeholders. The RL has the authority to prioritize the "day job" work of the assembled team to ensure that the identified critical situation receives the highest level of attention.
- **Leading "lessons learned" analysis.** After the critical issue is resolved, the RL analyzes the processes and elements involved to identify root causes, determine where normal escalation steps failed, and spot problematic patterns of behavior. The RL then shares these results with associated internal teams who can help improve operations going forward.

- **Assuming the role of ultimate decision-maker.** If the team cannot reach a collaborative decision, the RL is expected to make the necessary decision to move the situation forward.

Profile of an Effective Resolution Leader

Because the role is so critical, it's worth spending time on the characteristics of a successful RL, although there isn't one magic formula of skill sets and experience that will guarantee success. In our experience, we've found that effective RLs come from varied backgrounds and industries.

However, there are common attributes:

- **Effective communications skills.** These skills include knowing the audiences and the level of detail they require, the ability to manage sensitive information and appropriately share information externally, and the ability to clearly and concisely communicate in both written and verbal form. Skills also include the ability to keep an open mind when communicating with the customer, remaining calm during heated conversation, and coaching team members to do the same. Ideal RLs can also engage executives in a way that gets their attention and gives them confidence that the organization's response is the right one.
- **Ability to gauge the appropriate amount of urgency and sound an alarm.** This skill, developed over time through training, experience, and team culture, alerts the RL when an issue might escalate further, impact your customer base, or become a PR nightmare.
- **Mix of command-and-control and collaborative leadership skills.** Some situations may require directing a cross-functional group while others may require a more facilitative and monitoring role to arrive at a solution.
- **Sound judgment.** The RL must often decide how best to do what is right for the customer and for the company.

The role of the RL is unique. Even candidates who have the required project management, customer service, and communications skills will still need extensive training, ongoing coaching, and on-the-job shadowing to be effective. All new RLs at Cisco undergo a minimum of three months of formal mentoring with seasoned CAP team members in order to prepare for the broad range of crisis situations.

2B: Executive Sponsor

Once the RL escalates an issue up through the chain of command, they will need to identify an executive sponsor. The executive sponsor must be at a VP level or higher and closely associated with the team or issue responsible or impacted by the problem. The conversation at this level can be uncomfortable, but it is essential because you do not want to surprise upper management with last-minute crisis situations. Note that escalating to management should be about the issue, not about the person or team involved.

The responsibilities of an executive sponsor include:

- Working with the RL to determine the high-level communication strategy and broker agreements.
- Guiding front-line customer-facing teams if required, particularly regarding message delivery.
- Driving urgency through other teams if necessary, and communicating with peer executives if any course correction is needed.
- If required, engaging with the customer directly as the executive responsible for the team.

At Cisco, some of our executives take ongoing sponsorship roles with key customers, so they have a vested interest in actively engaging in any critical situation that occurs with them.

2C: Critical Situation Response Team

Finally, every issue needs a team of people who are dedicated to its resolution. The knowledge and presence of the team can lessen anxiety and instill a measure of confidence that the situation is being handled with the appropriate level of urgency.

Because so much is riding on the EM team, creating the right cross-functional team is critical for success. It is this team's responsibility to get to the root causes of the emergency. Critical situation response teams should be encouraged to think outside the boundaries of standard processes and find solutions that work.

A unique team is built to handle each escalation, but it typically includes members who may have already been involved in issues related to the now escalating critical situation. We also include people with specific technical expertise and/or experience in the operations of the business unit or customer account affected. Team members can include, but are not limited to, sales managers, systems engineers, legal staff, public relations personnel, senior technical support, and product development engineers. The RL is responsible for setting the standards and expectations for the team: the need for each team member to be resourceful, work well under extreme pressure, and communicate clearly and concisely. Problem solving at this level requires the free give and take of ideas, as well as the ability to handle sensitive and high-stress scenarios with finesse. If any of the team members prove unable to meet the demands of the situation, the RL can approach that individual's management and request an alternate resource.

While the people drafted to this team typically have other job responsibilities, carrying out the tasks in the critical response execution plan becomes their top priority. Department managers must acknowledge these issues now take precedence over other projects.

Associated EM team responsibilities typically include:

- Collecting all information required by the engineering and delivery organizations to resolve the issues.
- Providing technical updates and situation progress as directed by the RL.
- Being available on the customer site if required by the RL, with pagers and mobile phones on for the duration of the incident.
- Attending conference calls and meetings as directed by the RL. If an EM team member cannot attend, he or she must contact the RL directly and ensure that his or her manager can attend instead.

With a strong EM team in place, you are ready to move to Best Practice #3

When is a Situation Critical?

Issues are typically defined to have reached a critical state when they threaten to damage the reputation and/or operations of the business. However, there can be different types of critical engagements based on conditions of the situation and the response required.

Crisis response is not part of the normal escalation process. It is an "exception only" process and should not be viewed as part of the standard systems used to resolve issues.

The vast majority of issues are handled via normal processes. But, if the normal technical support process is not yielding results, or if the situation is worsening, it is time to invoke a formal escalation process. Escalation is all about ensuring that the right people are involved to make the right decisions for the situation, for your company and most importantly, for your customer.

Best Practice #3: Define a Critical Situation Process

Think of critical situation response as a heightened level of escalation: When external or internal catastrophic errors or events occur, you need to know how to keep your business running. It's crucial to develop a standard response plan so that you and your team can mobilize immediately and not wait for direction or guidance.

To help you establish your own procedures, Figure 1 below illustrates a process similar to one we've developed over 25 years of hands-on experience.

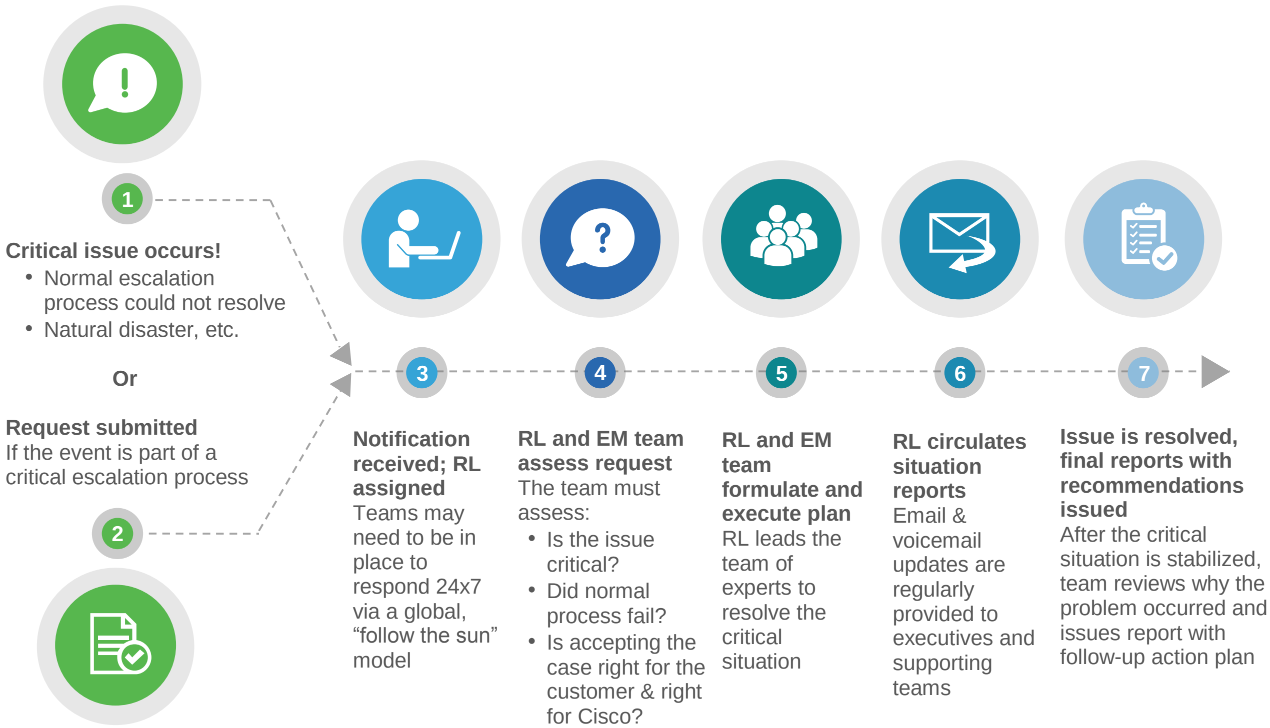

Figure 1. A successful EM lifecycle is characterized by a well-established, measured, repeatable process.

3A: EM Process Overview

A typical critical situation response is outlined below. Of course, emergencies do not follow scripts. But regardless of how they unfold, important items such as escalation, planning, execution, communication, and wrap-up are consistent program components.

Step #1 and #2: A critical issue occurs, such as a natural disaster or significant failure. Or, a case is submitted (usually by a sales or services team) when a business-impacting issue occurs that normal process does not resolve.

Step #3: A RL is assigned and completes an assessment of the situation.

Step #4: The RL decides whether to allow normal business process to resolve the issue or to accept the case and engage the RL team.

Step #5: If the case is accepted, the RL takes ownership and leads the team through the formation, execution, and wrap-up of an action plan.

Step #6: With the help of the EM team, the RL creates and distributes the first of many situation reports. This step is covered in more detail in a later section.

Step #7: The critical situation moves through the resolution process, owned and governed by the RL, until it is deemed under control by the RL and the executive sponsor and meets customer requirements. This step is covered in more detail in a later section.

3B: Tools and Resources

The right tools and platform can help you better track and manage escalations rather than being challenged with disparate tools and processes. It also ensures that messages and reports are delivered in a consistent and predictable format so your stakeholders know what information to expect and where to look for it if needed. While escalation tools can be similar to case tracking and management tools your organization may already use, there are some important needs to consider, described in more detail below:

- Ability to share information
- Single source of data collection
- Reporting and communication

Information Sharing

Critical issue escalations generally require people to work together across organizational boundaries. We recommend identifying the most important information-sharing tasks during an escalation and tracking them using an escalation platform. For example, in our organization, we've found escalations almost always begin with a technical support service request (SR), so we integrated the ability to connect the SR with the escalation request. An escalation platform also captures the names and contact information of everyone involved. Emails, especially those containing action items, can then be easily sent directly from the tool. Features like these help ensure the entire escalation team is on the same page and receive timely notifications as they take steps to resolve the issue.

Single Source of Data Collection

Even large companies with sophisticated databases can find it difficult to consistently track escalations, the reasons they occurred ("the trigger"), and other related data. An escalation platform can help you overcome these challenges by collecting metadata on every escalation, including:

- Product or equipment details
- Escalation triggers and causes
- Associated hardware or software defects
- Associated sales orders
- Customer sentiment

Our platform collects escalation management information such as meeting notes, action items, team member contact information, lessons learned, customer reaction, planning documents, and so on. This rich repository provides a single source of truth for a given escalation that can be mined later for valuable insights and to spot escalation patterns. Insights and patterns can be shared across the company and used to drive meaningful improvements in products and operational processes, ultimately improving customer satisfaction.

Reporting and Communication

Consistent reporting and frequent communication are critical during an escalation, so integrating those capabilities saves time and increases consistency. With the right escalation platform, you can quickly list report recipients and distribute reports via email and even create voicemail distribution lists. At Cisco we also assign each incident a priority level to easily distinguish high-priority cases to executive stakeholders. Information about multiple escalations can be integrated into a dashboard view, as shown in Figure 2 below.

Customer Assurance Program Dashboard

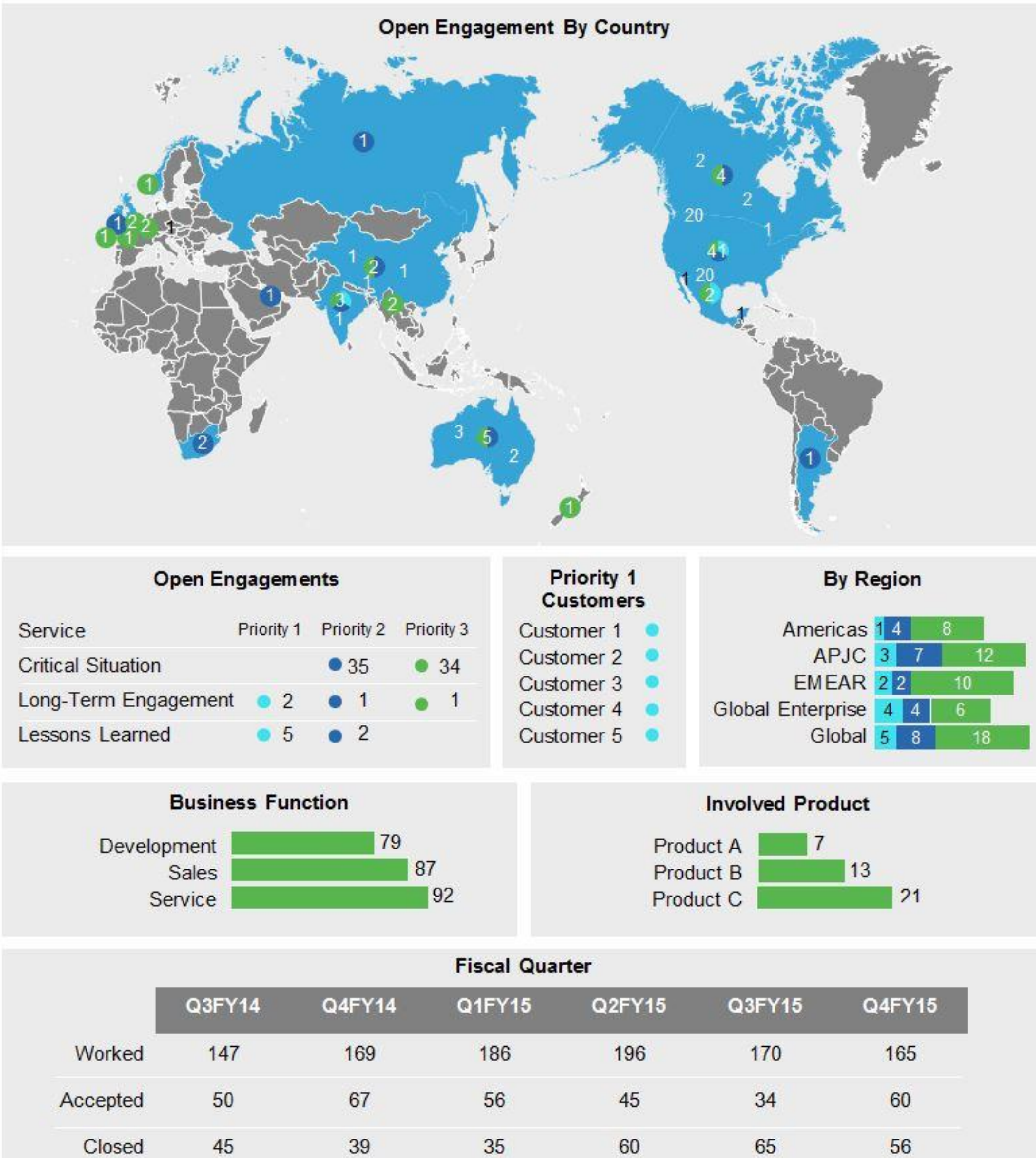

Figure 2. A reporting dashboard where EM team members can quickly pull the information they need is a real time-saver.

Some of the specific reports that the Cisco EM team regularly sends to stakeholders include:

- Executive Dashboard that provides the single source of truth for all critical engagements (similar to Figure 2 shown above)
- A view of quarterly trends that combines metrics and business insight to drive overall organizational changes

- Detailed individual metrics and overall staffing model that highlights performance and resource needs per case
- Weekly scheduled report to key leaders in each major organization (Services, Sales, and Engineering) that provides organizational-wide visibility to critical customers and longer term trends impacting that organization

Best Practice #4: Critical Response Execution

Once a critical incident has been identified, the decision has been made to act, and the EM team has been assembled, it's time to execute the response.

No single step-by-step process will apply to every organization or customer escalation. Rather than dictate a process for your organization to follow, this section highlights core best practices we've developed that could apply to almost every critical situation.

4A: Managing Escalations with Meetings

Although email plays a role in escalation management, frequent meetings are essential for managing people through a successful escalation process. The kick-off meeting should have a clear agenda where team members decide on actions, owners, timelines, and the frequency of subsequent meetings.

The RL's meeting responsibilities include leading the dialogue, making sure the agenda is followed, and helping drive toward conclusive action plans. He or she is there to listen to all input and then speak up when needed. It is important that the RL encourages EM team members to express their ideas and concerns. The RL needs to create an environment where people are comfortable disagreeing with each other and with the RL in search of the best solutions.

The RL should also clearly identify next steps and associate them with a task owner. The action of seeing one's name in print before a large audience can be very motivating. Peer pressure in meetings can also be very useful. If a team member is not actively participating or delivering as expected, the RL should not hesitate to escalate while keeping in mind the advice to "Praise in public; reprimand in private."

Asking the right kinds of questions and actively listening without judgment or interruption are critical skills for effective problem solving. Even under severe time pressures, it is important that the EM team identify all of the stakeholders involved and gather as much information as possible from them about the issues. By asking incisive questions and then listening to responses, the team gains valuable insights that can spark new breakthroughs. The RL should set the example by asking the people involved in the escalation for their opinions and listening to their answers without interruption.

4B: Documenting and Communicating Your Critical Situation Response

It is vital to rigorously track and document actions, planned and executed, and to distribute meeting notes to the entire working team in a timely manner. Consider using a spreadsheet and attaching it as a file for cases with multiple situations or locations.

A consistent communications strategy is a best practice that we have continually refined over the years. Once the EM team has developed an understanding of the situation and the steps that need to be taken to meet the customer's requirements, the RL should send an initial report to stakeholders as quickly as possible. Remember to stick with the facts, even if the facts are unclear. Subsequent situation reports should be issued as the situation changes. Maintaining visibility of the critical situation encourages a consistent focus throughout the company.

The content of the situation report should be simple and concise. The objective for an initial report is to communicate the following:

- What has happened and where, and whether the event has happened before.
- Current information and issues, such as number of people possibly affected or known adverse outcomes.
- What the team is doing in response and who the task owners are.
- If there is a mandatory or voluntary reporting compliance requirement.
- If the media is already involved and whether a plan for communicating with the media is in place.

4C: Closing a Critical Situation

The situation is constantly reevaluated as root causes are proposed, tested, and accepted as valid, or as other situations emerge until the critical response winds down. The scope and exit criteria are the formal boundaries around the escalation. Having a well-defined scope and exit criteria help you determine when the escalation situation is considered complete and tasks are done.

Consider these questions when determining your exit criteria:

- When would employees and stakeholders consider the escalation over?
- How do you provide confidence that the problem is fixed and won't reoccur?
- Does your solution address the basic technical or business issues? How do you know?
- How do you avoid similar escalations in the future?

4D: Formalizing Lessons Learned

Once a critical situation is resolved, the worst may be over, but the work is far from done. A key responsibility in completing a critical situation response is to ensure that all information about the event is up to date and documented. Another responsibility is to solicit feedback from the participants who played a key role, those affected by the event, and any stakeholders.

One of the most important outcomes from critical situation responses is your organization's ability to learn from them. All critical engagements should include a "Lessons Learned" stage after the EM team identifies root causes and addresses the immediate customer concern. This important step closes the loop with customers, cross-functional team members, and business functions that contributed to resolving the crisis.

While working a specific critical escalation, the EM team should always be on the lookout for trends or patterns that could indicate a broader systemic problem. These signs could point to breakdowns in product design, company policy, or business processes that are causing or contributing to problems that ultimately bubble up in the form of critical situation escalations.

Some general common root causes of systemic issues that we've encountered include:

- Product and service quality, such as ease of use, reliability, and performance
- Business process inconsistencies across divisions and geographic regions as well as complexity that's passed down to customers

- Duplicate, complex tools
- Policies that slow order processing
- Process gaps between organizations

The failures that resulted in the critical escalation, while challenging, provide great input and opportunities for systemic improvement across the company. By spotting connections and patterns across a number of critical escalations, we've been able to prevent or minimize similar situations later on. Applying lessons learned can also improve similar deployments or situations. All lessons should be shared across functions and regions to provide best-case scenarios for the future and to inform future product and process design.

Escalation and critical situation response are about getting all hands on deck to address a severely degraded situation. But we've come to realize that a rigorously developed EM program can lead to so much more. If the hard-won insights gained from the event are put to good use, they can address systemic problems and prevent issues from reoccurring in the future. This means taking a proactive and preventive approach, which is our next and last best practice.

Best Practice #5: Moving to a More Proactive, Preventive Model

Positioning your company in the best possible situation for the next emergency requires a continued commitment to customer success. It is one thing to face an emergency, respond successfully, then document and circulate the results. It's another to be proactive and implement programs that incorporate lessons learned into a continuous cycle of improvement. Two such programs we have implemented are Readiness and Risk Assessments and expanding the impact of the Resolution Leader role.

5A: Readiness and Risk Assessments

Based on lessons learned reports from critical escalations, we've developed a Readiness and Risk Assessment that examines the entire "whole product offer" and provides a prioritized risk analysis to our company's decision-makers. Each risk assessment includes the financial impact an incident could have on the company.

During a Readiness and Risk Assessment, the EM team proactively and collaboratively engages with business units to identify gaps and potential risks in a product or process under development, and helps senior leadership prioritize those risks and define and implement mitigations. We have a consistent track record of fewer than average to no critical situations in product lines where high priority gaps were addressed by the business.

The proactive escalation lifecycle promotes the adoption of "high impact" lessons-learned recommendations such as incorporating new technologies and supporting new business models. The lifecycle also helps establish a process for continual predictive issue identification by employing a continuous feedback loop that incorporates testing into each step.

5B: Expanding the Impact of the Resolution Leader

Successful RLs will have unique expertise in crisis management, communications, and executive engagement – skills that are valuable to many stakeholders both within and outside your business. At Cisco, we expanded the role of the RLs to include more far-reaching activities, such as training others and serving as a liaison between our sales organization and corporate functions. Examples of these engagements include:

- Long-Term Engagements: Some critical escalations unveil a more complex set of customer-specific issues than would normally be addressed by our escalation management team. In these instances, a very experienced RL with specialized skills will travel on-site to provide a long-term assessment of the customer’s issues, and will lead a joint effort with that company’s leaders to improve business and technical operations. In the process, the RL will actively train the company leaders in internal escalation management to prevent future issues.

- Escalation Leadership Community: A cross-functional, internal community of escalation teams across the corporation that shares best practices for escalation management and ensures consistency of these practices at all levels across the company.
- Industry Mentoring: Cisco has mentored other companies to start similar programs. Today 16+ companies in the industry have programs modeled on ours, which contributes to a common escalation management framework that can be called on when multiple companies are involved in the same critical escalation by a mutual customer.
- Field Liaison: Our RLs train field-facing teams in Services and Sales to use critical situation response best practices and situation management techniques to resolve customer issues before they escalate.

These programs have helped us improve the visibility and handling of our escalation process, and resulted in fewer preventable critical escalations, increasing customer confidence and satisfaction.

Conclusion

There are many advantages to a well-defined escalation process, the most important being a swift and effective response to a severely degraded customer situation. The process also helps smooth your internal team operations by clarifying issues and codifying a set of predetermined rules of engagement. It also delivers a focal point of “truth” versus a swarm of panicked emails and swirling rumors. By defining ownership and facilitating teamwork, you will save valuable time during the first critical hours, establish the foundation for a more informed post-event analysis, and ensure your company gets back on track to delivering a satisfying customer experience.

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