



Executive Escalation Triage Card

Use this card when a customer request, executive concern, or delivery surprise might displace planned work. It makes the trade-off visible before the organization quietly treats a request as the next priority.

Adapt it to the team's current ticket, decision, incident, or planning system. Keep client systems authoritative; this card is not a replacement for incident response, security, privacy, legal, finance, contractual, or client-policy review.

01 NAME THE REQUEST

- Plain-language request or concern:
- Who is affected:
- Who raised it:
- When it arrived:
- Known customer, business, service, or risk impact:

02 CLASSIFY THE CONCERN

Choose the label driving the response. A request can have more than one label.

[] **Active incident** — live safety, security, service, data, or customer harm.

[] **Commitment at risk** — customer, contractual, regulatory, or public commitment may be missed.

[] **Decision request** — a consequential choice needs evidence, trade-offs, and an owner.

[] **Signal** — a complaint, idea, or anecdote that may matter but does not yet change the plan.

03 MAKE THE TRADE-OFF VISIBLE

PROMPT

RECORD

What happens if nothing changes this week?

What is the actual deadline, and where did it come from?

What evidence exists beyond the original request?

What work, capacity, commitment, or risk moves if this moves up?

Who can accept that trade-off?

Who will communicate the next answer?



04 CHOOSE ONE NEXT MOVE

NEXT MOVE	USE WHEN	OWNER	NEXT UPDATE / DECISION DATE
Interrupt now	Consequence is immediate and material. Name the work that pauses.		
Bounded discovery	The concern may matter, but evidence is insufficient to choose a solution.		
Trade and schedule	The work belongs on the plan, but scope, sequence, or capacity must be chosen visibly.		
Decline or reroute	The request does not belong with this team, does not justify investment, or has a better non-product answer.		

05 COMMUNICATE THE DECISION

Use a short, concrete response:

WORKING PROMPT

We see the concern: [plain-language impact].

The actual urgency is: [why it matters now].

We are taking this next step: [interrupt, discover, schedule, or reroute].

This changes: [planned work, customer expectation, or decision date].

[Named owner] will update you by [date or condition].

06 LEARN FROM THE PATTERN

At the next relevant review, ask:

1. Which escalations became true interrupts, and why?
2. Which arrived without enough evidence to decide?
3. What planned work was repeatedly displaced?
4. Where are customer, sales, support, product, and engineering working from incompatible expectations?
5. What lightweight mechanism would prevent the same uncertainty from returning to one sponsor?

BOUNDARY

This is a client-neutral operating template, not an incident-management protocol, security certification, privacy program, legal analysis, employment policy, or contractual commitment. Follow the organization's existing policies and use appropriate professional review for consequential situations.