Escalation Matrix

Who hears about a problem, and how fast. One page, so nobody on shift has to guess whether this one gets a call.

SITE OR DEPARTMENT	OWNER	REVISION	DATE ISSUED	NEXT REVIEW	APPROVED BY

How to use this template

1. Type straight into the boxes on screen, or print it and fill it in with your team leaders.
2. List the problems you'd least want to hear about late, across safety, quality, delivery, materials, machines, cost, people and outside visits. Put each under one of the three tiers.
3. For each one, write a measurable threshold (see below), who is told, how, how fast, and who tells the customer or supplier.
4. Fill in what the team can decide without a call (section 4), then review the matrix after 30 days and reissue it with a new revision.

What a threshold is

The point where a problem moves into a tier. Make it something the person on shift can measure without judgement, so two people reading it at 2am make the same call.

Four kinds that work

Time: line down over 2 hours. **Quantity:** 5 or more assemblies failing the same test in a shift. **Money:** a job 10% over its quoted hours. **Customer:** the job is due to ship this week.

Not a threshold

“A long stoppage” or “a serious quality problem”. One problem can sit in more than one tier: line down 30 minutes, the team handles it; over 2 hours, tell me today; over 2 hours on a job due out this week, call me now.

1 ● Call me now — A phone call, day or night

Problems that can't wait for the morning. No answer? Ring again, then the next name on the call list.

- An injury beyond first aid, a fire
- An HSE inspector or unannounced audit
- Suspect product already with a customer
- A line down past your threshold on a job due out this week

EVENT OR PROBLEM	THRESHOLD (MEASURABLE)	WHO IS TOLD (NAME OR ROLE)	HOW	HOW FAST	WHO TELLS THE CUSTOMER OR SUPPLIER

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2 Tell me today Before the end of the day

Problems the manager needs to know about before the end of the day.

- A customer delivery that will be missed
- A complaint or returned assembly
- A batch failing test, suspect components
- A machine or the ERP down past your threshold

EVENT OR PROBLEM	THRESHOLD (MEASURABLE)	WHO IS TOLD (NAME OR ROLE)	HOW	HOW FAST	WHO TELLS THE CUSTOMER OR SUPPLIER

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3 ● Bring me in before While there's still time to change the outcome

Problems you can see coming.

- A shortage that will move a build date
- An end-of-life notice
- An engineering change hitting stock or work in progress
- A job running over its quoted hours or cost

EVENT OR PROBLEM	THRESHOLD (MEASURABLE)	WHO IS TOLD (NAME OR ROLE)	HOW	HOW FAST	WHO TELLS THE CUSTOMER OR SUPPLIER

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4 The team decides

No call needed: act, log it, raise it at the next meeting

What the people nearest the problem can decide without asking, and the limit on each.

- Move the next job forward while a line waits on parts
- Book overtime up to an agreed number of hours
- Call in the maintenance contractor
- Quarantine suspect stock

Review the calls each month. If the team could have handled one with the authority, skills or part, change that and move it here.

DECISION	LIMIT	WHO CAN MAKE IT	WHERE IT'S LOGGED

5 Call list

In order: if the first name doesn't answer, ring the next

Keep it current, with a printed copy by the line phone and in the shift handover file.

ORDER	NAME	ROLE	PHONE (WORKING HOURS)	PHONE (OUT OF HOURS)

Want to build it with your team?

Grindstone runs this as a workshop with your managers and team leaders, on your site or remotely, and you leave with the matrix, the team's decisions and the call list agreed. Every job has a fixed price, agreed before we start.

enquiries@grindstone.ltd · grindstone.ltd/consultancy

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