



HOW TO ESCALATE EFFECTIVELY

Follow this simple escalation format to ensure that the impediment can be removed with clarity and with the least amount of turbulence for everyone involved.

TITLE (GIVE IT A NAME!)

Give it a name, so that we can describe it as a group.

ISSUE (FRAME IT UP)

Frame up the problem. Describe it in a few sentences or less. Bullet points are recommended!

IMPACT (THIS IS WHAT WILL HAPPEN IF WE DO NOT FIX IT)

In a few sentences, describe what will happen if this issue is not addressed. Make sure to include how often, cascading failures, timelines, and costs where possible. Share as much unwelcome news as possible. Bullets points are recommended, and clearly differentiate between the facts and the hypothesizes!

OPTIONS (IDEAS TO FIX THE PROBLEM)

List all the options that your team thinks are viable. For each option, give it a name, and include the cost, timelines, and risks. Like impact, make sure to clearly differentiate between facts and hypothesis. *Note: Doing nothing is always an option, the idea is that doing nothing will ensure the issue and impact persist, but the escalation is still highlighting the fact and by choosing to do nothing, the organization is indicating that this problem not a priority to fix. Recommendation (we think this is the best option!)* As a team, pick the best option and in a brief statement describe why the team picked it.

SOLUTION (AS AN ORGANIZATION – THIS IS OUR PLAN!)

As a team, including your leadership, select the best option to the solve the problem.

EXAMPLE

TITLE

Data Stage Licensing Issue

ISSUE

The team only has one license to do Data Stage programming.

IMPACT

Since that license is tied to one developer, only one developer's machine can do data stage work. We could potentially complete the work in 2 sprints vs 8 sprints.

OPTIONS

MOB IT OUT

The team will not acquire a license and just mob. This costs nothing in licensing fees and can be done immediately. The risk involved is limited to that laptop functioning.

BUY LICENSING

Purchase a license for each team member. This will incur a licensing fees for each developer. There is no risk that can be acknowledged.

PAIRING STATIONS

For every two developers on the team, create a pairing station that will have a single license for data stage development. This cost can initially be limited to just the licensing costs. There is no risk that can be acknowledged. In fact, we anticipate the licensing will cost more than a good pairing station.

RECOMMENDATION

Pairing Stations will reduce the licensing costs. Combining it with "Professional Pairing Stations" it is much more cost effective than buying a license for each developer.

SOLUTION

(Pick an option)