ESCALATION RULES

This document replaces "when in doubt, ask the founder" with written rules: which signals escalate, to whom, and how fast. The owner is the first escalation stop for their fire — the founder is the second stop, and only for the signals on the founder's short list (see the Founder Involvement Boundaries file). Fill in the signals from your own business; the examples show the shape.

WHAT MAKES A GOOD SIGNAL

A signal has to be observable — something a reasonable person can check, not a vibe they have to interpret. "Escalate if it seems serious" puts the judgment burden right back on the person you're trying to relieve. "Escalate if a client mentions canceling, refunding, or a lawyer" is checkable: either they said it or they didn't. Write every signal so a week-two hire could apply it.

THE THREE SPEEDS

Every signal gets exactly one of three clocks. Do not invent a fourth.

- Same hour: minutes change outcomes. A client mid-cancellation, money actively leaking, anything public and spreading.
- Same day: serious but not burning. Most real escalations live here.
- Next weekly review: patterns, near-misses, boundary questions — anything where the value is the discussion, not the speed. This is the workhorse speed, and the most underused.

THE ESCALATION MAP

SIGNAL	GOES TO	HOW FAST	FOUNDER NEEDED?
Client says cancel, refund, dispute, or lawyer	Owner, then founder	Same hour	Yes, same day

SIGNAL	GOES TO	HOW FAST	FOUNDER NEEDED?
A contracted deadline will be missed	Owner	Same day	Only if the client relationship is at risk
Same error appears twice in one week	Owner	Same day	No — weekly review note
Spend, discount, or refund above published threshold	Founder	Same day	Yes
Payment over $1,000 fails or a payout is blocked	Owner	Same hour	________
Anything going public with a new claim or price	Owner	Same day	________
your signal _____	________	________	________
your signal _____	________	________	________
your signal _____	________	________	________

SIGNALS BY FIRE

Translate each installed fire's dangerous moment into a trigger. Examples per fire type — replace the numbers with yours:

- The Approval Pileup: a decision has been waiting on any single person for more than 2 business days.
- The Information Black Hole: the same question has been asked 3 times in a month — that's a documentation gap, escalate to the knowledge owner, not the founder.
- The Delegation Boomerang: a task changes hands without a confirmed receiver.
- The Rework Loop: the same deliverable fails the standard twice.
- The Broken Handoff: work sits between two people for more than 1 business day with no named owner.

- The Founder Trust Trap: a client bypasses the account lead to reach the founder directly — goes to the owner, not the founder.
- The Revenue Drop-Off: a qualified lead has had no follow-up for 72 hours.
- The Accountability Vacuum: a written standard slipped and nobody flagged it within a day.
- The No-Backup-Plan Breakdown: any new tool signed up outside the company account rule.

THE THREE SIGNALS THAT MATTER MOST IN OUR BUSINESS, WITH OUR NUMBERS:

THE NEVER-ESCALATE LIST

Just as important: what must not come to the founder anymore, in writing, so nobody has to guess. When these show up anyway, the response is a warm redirect, not an answer.

- Anything with an answer in the documentation.
- Any decision inside an owner's published boundaries.
- Routine scheduling and routine client questions.
- Tool hiccups that have a workaround.
- First-time small mistakes already being fixed by their owner.
- FILL: our additions

THE ESCALATION MESSAGE FORMAT

Every escalation arrives in three labeled parts. An escalation that arrives as "hey, got a sec?" costs twenty minutes; the same escalation in three lines costs two.

TEMPLATE

ESCALATION — [account or process name]

What happened: [facts only, two sentences maximum]

What I've done: [actions taken and decisions already made]

What I need: [a decision, an approval, or just awareness — pick one]

TEMPLATE

Example: ESCALATION — Riley account. What happened: Riley's CFO emailed at 2pm asking to pause the contract, citing budget. What I've done: acknowledged within the hour, pulled account history, drafted a retention offer per the guidelines. What I need: fifteen minutes today — this crosses the client-at-risk line, so the final call is yours. Draft attached.

TWO FAILURE MODES TO WATCH

Over-escalation: everything still floods up, just better formatted. The fix is almost never coaching people to escalate less — it's widening or clarifying the written authority in the Decision Authority Guidelines, then redirecting consistently.

Under-escalation: someone sits on a thing that genuinely needed you, out of pride or fear. Do not respond by loosening everything. Add the one missing signal to the map, and thank the person who surfaced it — loudly. The team learns escalation is safe by watching what happens to the first person who escalates something scary.

DOCUMENT STATUS

FIELD	ENTRY
Signals confirmed with owners on	________
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Last updated	________