

Managing Project Escalations

- ▶ - Escalation: a structured request for authority, not failure
- ▶ - Risk: might happen; Issue: has happened; Decision: needs authority
- ▶ - Lifecycle: threshold → one-page package → right channel → close loop
- ▶ - Outcome: faster decisions, protected delivery, stronger trust



Why Escalation **Fails**—and Why It Matters



- Silence turns hidden problems into late-stage crises



- Over-escalating minor issues trains sponsors to ignore you



- Psychological safety drives early problem detection



- Reframe escalation as a professional project safeguard



Distinguishing True Escalations from Routine Problems

- Escalate on strategic impact, resource gaps, authority limits, or timeline threats
- Decision tree: Can the team resolve it? Act and document. If not, escalate.
- Avoid CYA escalations, info floods, and skip-level routing
- Route by tier: PM, functional manager, or steering committee



DEFINING CONCRETE ESCALATION TRIGGERS



- Combine aging (7 days) with impact (5+ day delay) triggers
- Immediate escalation for <48-hour irreversible risks or safety incidents
- Use a 2×2 matrix to separate severity from urgency
- Set time, cost, and scope tolerances to trigger on forecast breach



Background, Impact, and the Decision Needed: The Three-Part Skeleton



- **Master the skeleton:** background, quantified impact, clear decision ask
- **One-sentence issue:** “Client portal sync failing, affecting 12 of 15 projects”
- **Quantify impact precisely:** replace 'significant delay' with '3-day Q3 review slip'
- **Frame as a closeable question:** “Approve Option A by Thursday to preserve the window”

Building a Compelling Escalation Narrative



- Use Setup-Stakes-Shift-Stake-out to shape your story



- Adapt to audience: sponsors need trade-offs, managers need details



- Avoid sunk-cost anchoring and false urgency biases



- Apply CEDAR: Context, Exposure, Decision, Evidence, Required Action



The One-Page Escalation Package

- ▶ Enforce the one-page rule to drive analytical clarity before the meeting
- ▶ Five mandatory sections: issue, impact, options, recommendation, decision needed
- ▶ Lead verbally with your recommendation, not the chronological history
- ▶ Use visuals—a single metric, trend, or stoplight—to support the decision

INFORMATIONAL DISTILLATION FUNNEL



	ISSUE _____ _____
	IMPACT _____ _____
	OPTIONS _____ _____
	RECOMMENDATION _____ _____
	DECISION NEEDED _____ _____

Choosing the Right **Channel and Timing**

REAL-TIME For Crises

Direct, immediate communication when it matters most.



 **ASYNC**
For Structured Decisions
Thoughtful, well-documented communication that builds clarity and alignment.



- **Match channel to urgency:** real-time for crises, async one-pager for structured decisions.



- **Know your protocol:** agile stand-up blocker vs. formal phase-gate steering committee.



- **Set decision SLAs:** sponsor responds within 24 hours, committee within 48 hours.



- **Avoid parallel escalation:** one accountable owner prevents leader confusion and chaos.



Running the Escalation Meeting

- Distribute pre-read 48 hours ahead to shift from presenting to deciding
- Open with the decision gap, then recommendation and evaluated options
- Reframe denial as need for evidence; counter delay with cost of inaction
- Present three options to enable choice, not an ultimatum



Written Escalation that Gets Results



- Lead with answer-first: recommendation, reasons, and specific ask



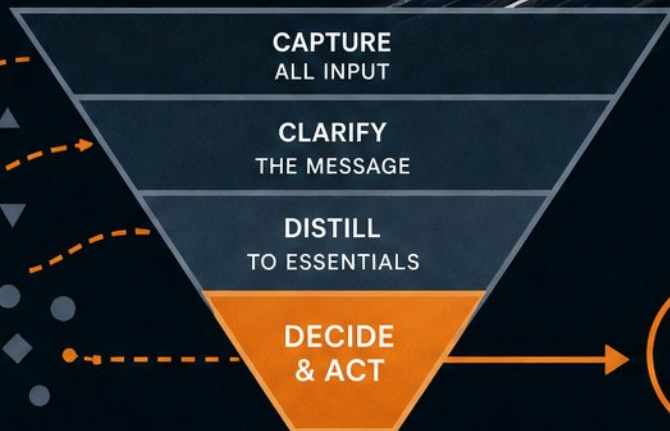
- Adapt one-pager for email, dashboard alerts, or governance reports



- Tell data stories: what the chart shows, means, and requires



- Replace vague terms with precise facts and dates



*Go-live slips from
Sept 5 to Sept 22*

Closing the Loop and Following Through

- Own the follow-through: document, assign, and communicate the resolution.
- Maintain an escalation log: date, decision, decision-maker, and outcome.
- Run blameless post-escalation reviews focused on process health, not blame.
- Refine escalation triggers using the feedback loop for the next phase.



Building a Healthy Organizational Escalation Culture

- Silence is the project's biggest operational risk—make early communication normal.
- Protocols are 'psychological safety infrastructure'—visible, tested paths to raise flags.
- Leaders must thank early warnings, respond calmly, and visibly act.
- Measure concern quality, response time, and recurrence prevention—not report volume.





Practical Application: Identifying and Preparing an Escalation



- Identify escalation triggers from a real-world project scenario



- Draft a one-page package: issue, impact, three options, recommendation



- Peer-review using checklist for clarity and 60-second decision readiness



- Facilitate a mock escalation; deliver recommendation in under two minutes



DECISION COMPASS

**ONE-PAGE
ESCALATION BRIEF**

! ISSUE _____

★ IMPACT _____

↗ THREE OPTIONS
• _____
• _____
• _____

★ RECOMMENDATION _____

ESCALATION INTAKE

**ESCALATION READINESS
CHECKLIST**

- ☒ Issue is clearly stated
- ☒ Impact is clearly explained
- ☒ Three options are distinct
- ☒ Recommendation is specific
- ☒ Ready for 60-second decision

DECISION GATE



Your Action Plan and Key Takeaways



- Identify one new trigger, template, or protocol to implement immediately



- Escalation is a structured decision request, not a handoff or panic



- An impact-quantified one-pager is the top tool for faster decisions



- Leaders build a culture where early, safe escalation is the norm



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Safety Release**



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