



Resolve or escalate

Customer resolution and escalation job aid (R-02)

For Customer Support Representatives on phone and digital contacts, and for supervisors who coach with it. Use it when you are unsure whether to transfer, before you commit to an outcome, and while you write the escalation note and the contact record. It supports CS-POL-014 v3.2 and SOP-CS-006 v2.4 and does not replace them.

Important

Anger or a manager request does not automatically mean escalate

Check your authority first. Then decide whether the conversation can continue safely and productively (CS-POL-014 escalation matrix).

Resolve with the six-step sequence

- 1 **Understand.** Confirm the issue, the outcome the customer wants, and what has happened.
- 2 **Verify.** Review the account, history, prior contacts and policy before you commit.
- 3 **Resolve.** Use your authority to correct the issue or give the next valid option.
- 4 **Explain.** Say what can and cannot be done, and why, in clear customer language.
- 5 **Confirm.** Agree the next step, timing and owner before you end the contact.
- 6 **Document.** Record the issue, action taken, promises made, and any follow-up or escalation.

Know your authority

Area	You may	Limit or condition
Billing correction	Reverse a duplicate charge or a clearly documented billing error	Up to \$75, after account verification
Service recovery	Waive one standard service fee or issue a customer-care credit	Up to \$25, for a documented Veylora-caused service failure
Other frontline actions	Reschedule standard appointments, update non-restricted account details, and process standard cancellations	When capacity is available; after verification; within published terms

Rules for every contact

- Acknowledge the concern without agreeing to facts you have not verified.
- Do not promise an outcome that needs approval.
- Chat and messaging follow the same standards.

Sources: CS-POL-014 v3.2 s2, s3, s5, s7 and escalation matrix; SOP-CS-006 v2.4 s2, s3, s6 and s9.

Decide: resolve or escalate

- 1 Is the issue within your authority?** Yes: it is Level 0. Keep ownership and resolve it. No: go to decision 2.
- 2 Does an escalation trigger apply?** Check the six triggers below. If none applies, keep ownership and explain the valid options.
 - **Repeated contact:** three contacts within seven calendar days on the same unresolved issue.
 - **Authority limit:** the request exceeds frontline financial or policy authority.
 - **Resolution impasse:** you have clearly explained the options, but the customer disputes the policy or no valid frontline path remains.
 - **Conduct risk:** serious misconduct, discrimination, harassment, threats or safety concerns.
 - **Information risk:** suspected account compromise, payment-data exposure or another restricted-data concern.
 - **External exposure:** the customer says an attorney, regulator, law enforcement agency or news outlet is involved.
- 3 Which level applies?** Match the situation to a row in the escalation levels table below.
- 4 Is the next owner available?** Yes: make a warm transfer and summarize the case first, so the customer does not restart the explanation. No: create a priority follow-up and tell the customer the next action and timing. Level 3: use the urgent route immediately.
- 5 Write the escalation note.** Include the customer issue, verified facts, actions taken, customer request, reason for escalation and commitment made.
- 6 Record the contact.** Include the issue summary, verified facts, action taken, customer commitment and Veylora commitment.

Level and owner	Use when	If you transfer
0 Frontline (you)	The issue is within your documented authority and needs no specialist review	Keep ownership through resolution and documentation
1 Lead review (senior support lead)	Repeated contact, judgment outside a standard path, an exception request, unclear ownership between teams, or the customer asks for a lead after you explain the options	Warm consult or transfer when available. If unavailable, create a priority follow-up within 2 business hours
2 Supervisor (support supervisor)	Service recovery of \$26 to \$100, a refund above \$75, a cancellation outside standard terms, a policy exception, or an issue unresolved after Level 1	Supervisor accepts ownership when you transfer. If unavailable, create a priority follow-up within 90 minutes during Support Center operating hours
3 Urgent or specialized (operations manager or specialist)	Safety, security, legal, reputational or serious conduct risk	Use the urgent route immediately. Preserve the facts, do not investigate beyond your role, and document the transfer

Sources: CS-POL-014 v3.2 s4, s6, s7 and escalation matrix; SOP-CS-006 v2.4 s7, s8 and s10.

Watch for these

Tip

Manager request before options

Say: “I can involve a lead when the issue requires it. Before I transfer you, I want to make sure I’ve checked the options I’m authorized to resolve now, so you don’t have to wait unnecessarily.”
(MACRO-CS-021, macro 5)

Caution

Avoid these shortcuts

Do not say “That’s just the policy” or “There’s nothing I can do,” and do not blame another team. Do not use a credit, refund or escalation only to end a tense contact. (KB-021A, KB-021C)

Important

Set a boundary only for abuse

Set a respectful boundary for repeated personal insults, aggressive interruptions or profanity aimed at you. A raised voice or criticism of Veylora means continue. End or escalate for a credible threat of harm, discriminatory or sexual abuse of staff, or abuse that continues after a clear boundary.
(CS-POL-014 s8)

Stop and escalate

Safety or security report

Never place it in a standard callback queue. Use the designated urgent-support route immediately.
(CS-POL-014 s7)

Important

A transfer without context is not a resolution

Before you transfer, pass on the issue, the verified facts, what you have already done, and what the customer is asking for. (CS-POL-014 s9)

Reference

Document control

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