Escalation Between Head Office and the Local Team

1. Purpose and scope

Every problem that the local team cannot solve reaches head office in the same form, with the same details and a set time for a reply. This SOP sets the steps so that issues do not sit between two time zones.

Item	Detail
Applies to	Companies with a head office and a local team in another country
Done by	Local team lead, head office contact and the country manager
Owner	Head of operations or country manager
Time target	Set by the company for each level
Review	Every 6 months and after any escalation that was missed

2. The steps

1. **Agree what needs escalating.** List the situations that go up, such as a safety event, a customer complaint above a set value, a payment problem or a missed deadline. Keep the list to one page.
2. **Try the local fix first.** The local lead notes what was tried and what the local team is allowed to decide.
3. **Escalate in one message.** Use one format: what happened, when, who is affected, what was tried and what is needed from head office. Send it by the channel the company sets.
4. **Say how urgent it is.** Mark the message as today, this week or for information. Use the same three words every time.
5. **Name one owner at head office.** One person at head office replies and owns the issue until it closes. Others stay in copy.
6. **Confirm receipt within a set time.** The owner confirms receipt within the time the company sets and gives the time of the full answer.
7. **Allow for the time difference.** Write the local time and the head office time in the message. Agree the hours when each side can be reached.
8. **Close the loop in writing.** When the issue is solved the owner writes what was decided and tells the local lead and anyone affected.
9. **Review monthly.** Once a month the two sides look at the list of escalations, pick the slowest one and ask why it was slow.

3. Escalation checklist

Print this, keep it on the shared page and tick it for every escalation during the first two weeks.

- ☐ List of situations that go up agreed and on one page
- ☐ Local fix tried and noted
- ☐ One message format used
- ☐ Urgency marked as today, this week or for information
- ☐ One named owner at head office
- ☐ Receipt confirmed within the set time
- ☐ Local and head office times written in the message
- ☐ Decision written and shared when closed
- ☐ Local lead and anyone affected told
- ☐ Monthly review done with the slowest case picked

4. Where this can break

Any SOP template lists the steps. These are the points where a busy team can slip, with a simple fix for each.

Where it breaks	What happens	The fix
Issue raised by phone only	Details are forgotten and nobody can find the decision later.	Follow every call with the one-format message.
Everyone copied and nobody owns	Five people at head office each think another will reply.	Name one owner and keep the others in copy.
Time zone ignored	A message sent at the end of the local day waits until the next one.	Write both times and agree the hours when each side can be reached.
Local team afraid to escalate	Small problems grow because raising them feels like admitting failure.	Say openly that early escalation is expected and thank the person who does it.
Decision not shared	The local team acts on the old instruction.	The owner closes every issue in writing.
No review	The same delay repeats.	A monthly look at the slowest case.

5. How to roll it out in 3 days

A new SOP fails when it is just handed over. This order gets the local team and head office using it within a week.

Day	What happens	Who
Day 1	30-minute video call with the local team lead and the head office contact, using 3 real issues from the last quarter. Ask where each one waited.	Country manager
Day 2	Send the next real issue in the one-format message. Fix the two biggest gaps, using Section 4.	Country manager
Day 3	Format and list go on a shared page. At the end of the month, the manager checks every escalation against them.	Manager and both leads

After that, a 5-minute look at the month’s escalations is enough to keep it working.

6. BEYOND the Checklist

This SOP works on the day it is introduced. Three months later, a new local lead has joined and learned the escalation steps from whoever was free. Teams change over time, so a written SOP needs three things it can’t do by itself:

- **A 2-minute training video** of the escalation steps, in the language staff speak, so every new joiner learns the same way on day one.
- **A local-language version** of the checklist.
- **A weekly 5-minute check** that someone actually owns.

Your own process: if your company escalates issues differently from this one, a 2-minute WhatsApp voice note on how it works today is enough. A written SOP in this same format comes back within 48 hours, at no cost. WhatsApp: +91 98101 41173 (India) | +250 799 524 457 (Rwanda)

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