LINKEDIN SERVICES PORTFOLIO / OPERATIONS DOCUMENTATION

Customer Support Ticket Escalation SOP

Example deliverable: a structured, usable standard operating procedure for an illustrative SaaS company.

Document control	Details
Document ID	OPS-SOP-014
Owner	Customer Success Operations
Version / status	1.0 / Demonstration
Effective date	Sample only
Applies to	Support agents, shift leads, technical support

1. Purpose and scope

Establish a consistent method to triage, document, escalate, and resolve customer support tickets. This SOP applies to email, chat, and portal submissions involving the fictional organization Northstar Cloud Services.

2. Roles and responsibilities

Role	Accountability
Support agent	Record details; assign severity; perform first-line checks; provide updates.
Shift lead	Confirm priority; coordinate reassignment; monitor response targets.
Technical owner	Investigate root cause; restore service; document resolution.
Customer success manager	Own customer communications for high-impact cases.

3. Severity classification

Severity	Definition	Initial response target
P1 - Critical	Broad service outage; no workaround available.	15 minutes
P2 - High	Major workflow blocked for multiple users.	1 hour
P3 - Standard	Limited issue or workaround available.	4 business hours
P4 - Low	Question, cosmetic defect, or enhancement.	1 business day

Response targets are illustrative and are not a service-level agreement.

4. Procedure

- Intake: Capture contact, organization, affected feature, symptom, start time, business impact, and screenshots or logs.
- Validate: Check for duplicates, known incidents, account status, and reproducibility. Never request customer passwords.
- Classify: Set severity using impact and urgency. A suspected security incident follows the security incident process immediately.
- Route: Assign an owner and record escalation reason, troubleshooting performed, and next action.
- Communicate: Acknowledge receipt, provide a case number and next-update time, and keep an audit trail.
- Resolve: Verify the corrective action, document the fix, obtain customer confirmation when appropriate, and close the ticket.

5. Escalation triggers

Escalate to the shift lead immediately for any P1 incident, suspected data exposure, a missed P2 response target, or repeated failures across customers. For unresolved P1 incidents, notify technical ownership and customer success concurrently.

6. Required closure record

Every closed ticket must include impact summary, chronology, actions taken, resolution or workaround, customer communication, and a knowledge-base reference where applicable.

7. Quality checks

Sample ten closed tickets monthly for accurate severity, complete notes, communication timeliness, correct ownership, and demonstrable resolution. Track recurring causes for process improvement.

Demonstration content only. Organizations should tailor roles, response targets, systems, and approvals before operational use.