Issue management and escalation

ITI, QA TEAM

V 1.0

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# Introduction

## Purpose of Issue management and escalation

The Issue Management and Escalation Plan provides a means to identify, track and resolve project issues throughout the life of the project ensuring effective communication of these issues with all stakeholders.

An issue is defined as any point of controversy, debate, problem, or concern that will adversely affect the success of the project.

Issues can be identified at any level of the organization and should be resolved at the lowest possible level. An issue that cannot be resolved at a particular level of the organization must be escalated to ensure the issue is brought to the attention of appropriate parties.

This procedure promotes visibility of long-standing unresolved issues as well as maintaining a historical record of issues that occurred and the associated resolution.

The Project Manager (PM) is responsible for creating and maintaining issues related information for the project.

# Issue management process

## Identify and Document the Issue

* Project Manager or any team member can raise an issue to be resolved
* Issue cannot be immediately resolved within the time but it should be documented in the Issue log.
* Each issues are assigned to an owner who is responsible for resolving the problem.
* All issues are assigned to a target resolution date

## Review of the issue

* Address open issues during the scheduled project/organizational meeting or as necessary.
* Review open issues that have passed their targeted resolution date. Monitor, review and address new or existing issues for possible escalation to the appropriate level.
* Update the issue log based on the discussion made.
* The owner of the issue shall report the status of the issue.
* Issues will be updated weekly or as seen by the project manager or other stakeholders.

## Communication of the issue

* The Project Manager will report on issues until they are closed.
* The Project Manager will share the status of the issues with the team members on a regular basis, as well as the Project Steering Committee.

## Escalation of the issue

* Determine whether the issue needs to be escalated according to the project’s escalation path.
* Criteria for escalation include:
  + Issues that affect more than one project
  + Issues that, if left unresolved, may jeopardize a key milestone or deliverable
  + Issues of high priority that are not being resolved in a timely manner
* If escalation is considered necessary, update the Status (to Escalated) and the Resolution/Status Comments of the Issue within the Issues/Decisions Log
* Communicate to the originator and the person originally assigned to resolve the issue that it has been escalated.
* In the event an issue needs to be escalated, it will be escalated according to the following escalation path:
  + Project Manager
  + ITS Delivery Manager and Project Director
  + Project Steering Committee
  + Executive Team
* The trigger for the escalation path will be the decided time to solve the issue. If the issue didn’t be solved within the decided duration from the PM it moves to the higher grade according to the escalation path.

## Issue Resolution

Once the issue is resolved then communicate the resolution with project manager, Issue owner and release manager.

Update the Issue Log Status to “Closed” the date of the closing should be recorded in the issue log and comments section should contain the variance between the target date that was set and the actual close date. Diagram

Description automatically generated

# Escalation Diagram