1. Executive Summary

Over a 7-week observation period, customer escalations increased significantly from **4.2% to 11.8%** within a contact center support environment. This report investigates the contributing factors using RCA methodologies and proposes targeted workflow improvements.

The findings indicate that the increase is primarily driven by process inefficiencies, outdated support content, and delays caused by layered approval structures.

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2. Problem Statement

The current escalation workflow results in delayed customer resolutions, multiple handoffs, and inconsistent communication. As a result, customer frustration increases, leading to higher escalation volume, extended handling time, and declining satisfaction scores.

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3. Scope of Analysis

This analysis includes:

- Phone and chat support interactions
- Categories reviewed: Technical Support, Billing, Refunds, and Account Access
- Review of agent behavior patterns, system response delays, and escalation triggers

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4. Data Summary

Metric	Value
Tickets Analyzed	18,500
Escalation Rate Week 1	4.2%
Escalation Rate Week 7	11.8%
Top Escalation Category	Technical Support (42%)
Escalation Trigger	Customer repeated information ≥2 times
Delay Trigger	Approval wait time >2 minutes

5. RCA Methodology

The following approaches were used:

- Ishikawa (Fishbone) Diagram
- 5 Whys Technique
- Process Walkthrough and Scenario Testing

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6. Key Findings

People

- New agents lack scenario-based escalation handling skills
- Confidence drops in technical or policy-sensitive conversations

Process

- No clear escalation rule threshold
- Escalations routed to supervisors regardless of specialization
- Approval chain creates bottlenecks

Technology

- CRM load delays during high traffic
- No automated triage or routing assistance

Content/Policy

- Knowledge base outdated and unclear
- Refund policies too restrictive and approval-heavy

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7. Primary Root Causes

Rank	Root Cause	Impact
1	Multi-layered approval structure	Longer resolution → frustration → escalation
2	Outdated knowledge articles	Wrong or unclear responses
3	No automated triage	Wrong routing → increased handling time

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8. Recommendation Summary

Area	Recommendation
Process	Introduce escalation threshold rule: *escalate only if unresolved after 2 mins or 3 clarification attempts*
Technology	Implement automated triage routing based on category
Content	Introduce 30-day knowledge base refresh cycle
Training	Specialized escalation prevention coaching for new agents

9. Expected Outcomes

Metric	Current	Target
Escalation Rate	11.8%	<5%
Avg. Resolution Time	9.1 min	7.0–7.4 min
First Touch Resolution	61%	75–80%
CSAT	3.6 / 5	$\geq$ 4.2 / 5

10. Conclusion

The escalation increase is predominantly a result of **process design flaws—not customer behavior or agent performance alone.** With workflow restructuring, content improvements, and triage automation, escalation volume can be reduced, customer sentiment elevated, and operational efficiency significantly improved.