

Case Lifecycle & Escalation Architecture

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1. Executive Summary

This document outlines a standardized logic framework designed to manage high-stakes enterprise technical support lifecycles. By defining clear decision paths based on incident severity (P1–P4) and business hours, this architecture ensures maximum system availability and consistent customer satisfaction.

2. The Problem Statement

Before this implementation, case routing was manual and lacked a unified "Source of Truth." High-priority (P1) issues risked stagnation without a clearly defined escalation trigger to Technical Account Managers (TAMs) or Tech Leads.

3. Key Architectural Features

- **Priority-Based Triage:** The system differentiates between critical P1 outages and standard P2–P4 tickets to allocate resources efficiently.
- **Conditional Decision Nodes:** Integration of "Business Hour" logic determines whether a case is immediately scoped or queued for the following day.
- **Active Monitoring (Milestones):** Integrated "Milestone" checkpoints to verify data and troubleshoot. If unresolved after one hour, the system triggers a "Tech Lead" ticket.
- **Stakeholder Synchronization:** Standardized paths for notifying TAMs and engaging in team standups to ensure cross-functional visibility.

4. Technical Workflow (Summary of Diagram)

1. **Ingestion:** Ticket is submitted and assigned.
2. **Triage:** Assessment of P1 status and business hours.
3. **Action:** Customer contact is initiated via call or email based on severity.
4. **Escalation/Verification:** Troubleshooting is validated against milestones; stagnant cases are escalated.
5. **Resolution & Closure:** Tickets are closed only upon confirmed resolution and system-sent follow-up.

5. Results

- **Standardized Triage:** Eliminated ambiguity in high-pressure Sev1 environments.
- **Reduced MTTR (Mean Time to Resolution):** Guaranteed technical intervention for complex issues within 60 minutes.

- **Scale:** Provided a repeatable blueprint for onboarding new technical engineers.