

When to Escalate

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Escalate to a supervisor when:

Mandatory Escalations

- **Credit amount exceeds \$100** (supervisor approval required)
- **Customer requests supervisor** (always honor this request)
- **Legal threats** ("I'm calling my lawyer" / "I'll sue")
- **Dispute involves safety issues** (electrical hazards, meter tampering)
- **Meter test required** (supervisor must authorize)
- **Multiple disputes from same customer** (pattern of disputes)

Discretionary Escalations

- You've investigated thoroughly but customer still insists bill is wrong
- Customer is extremely upset and conversation isn't productive
- Billing issue is complex and you need technical assistance
- You're uncertain about the correct resolution
- Customer disputes your findings and wants "someone else to look at it"

How to escalate: "I want to make sure we're doing everything possible to resolve this for you. Let me bring in my supervisor who can review this with a fresh perspective and see if there's anything else we can do."

Never say:

- "There's nothing I can do, you'll have to talk to my supervisor"
 - "You're being unreasonable, I'm transferring you"
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