Escalation Framework

Use this framework below to determine the severity of a crisis.

In the "description" column, describe what constitutes that definition of a crisis and what actions must be taken in response. Also include a few examples of what that crisis would look like.

In the "action" column, mention teams or individuals who may take action, such as legal, the PR & communications team, client marketing, the social media team, executive assistants, the C-suite, account managers or executives, and more.

Level	Description	Action
Level 1	This is the highest level of crisis escalation and should involve an all-hands-on-deck approach. Describe this situation as immediate to your clients, donors, employees, and/or all stakeholders. Examples: list the examples of this level. Typically, they involve violence, executive misconduct, or a long-term threat of damage to your clients, the company and/or stakeholders.	• Person/Team #1: *Task or action* • Person/Team #2: *Task or action* • Person/Team #3: *Task or action*
Level 2	Level 2 presents a moderate potential risk or impact on business operations, client success, and/or company reputation. Examples: list the examples of this level. These may include the risk of immediate major client churn.	• Person/Team #1: *Task or action* • Person/Team #2: *Task or action* • Person/Team #3: *Task or action*

Level 3	This is unlikely to pose a long-term risk to or impact business operations, client success, and/or company reputation, but the team should still be on the same page for responding. Examples: instances can include an executive leave of absence, a moderate client impact that can easily be (or already has been) remedied, or rumors (such as a merger/acquisition).	• Person/Team #1: *Task or action* • Person/Team #2: *Task or action* • Person/Team #3: *Task or action*
Level 4	This is where most "crises" will fall into. They tend to be slightly bigger versions of day-to-day issues that may need a bit of extra effort to be fully resolved or addressed. Examples: Some examples include a short outage with no impact on support or an angry client on Twitter.	• Person/Team #1: *Task or action* • Person/Team #2: *Task or action* • Person/Team #3: *Task or action*

Incident Response Team

Describe the purpose of this team, why it was assembled, and what it is responsible for doing.

First Line of Defense

Identify the key players to be informed once the company is aware of the crisis. The list should include the names of the individuals, the team/department those people are members of, and how to best communicate to each member individually. If there is an internal chat system or group email for the whole team, list that here as well.

- **Person/Team #1:** Email and/or Phone Number
- **Person/Team #2:** Email and/or Phone Number
- **Person/Team #3:** Email and/or Phone Number
- **Person/Team #4:** Email and/or Phone Number
- **Group Email/Communication Method:**

Greater Response Team

Indicate which escalation level will involve the Greater Response Team. Additionally, list out the core departments that comprise the Greater Response Team, and if appropriate, note that other departments or individuals not listed below may be brought in as needed. Teams that make up a greater incident response team may include the following:

- Communications
- Client Support
- Legal
- Donor Communications
- Social Media
- Client Marketing
- People Ops and HR
- Product/Engineering
- Executives
- Security

Roles and Responsibilities

In a general crisis – regardless of escalation – what should each of these departments be responsible for once informed of the crisis? Feel free to add a row to include any other department that is right for your business.

Team	Contact Name	Roles and Responsibilities
Communications		
Board		
Client Support		
Legal		
Social Media/Marketing		
HR		
Development		
[Other Department]		