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HP Escalation Processes and Tips

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Today, Critical Systems Solutions require an organization to understand not only the needs and requirements of the end user, but how to best utilize the Escalation Processes with Hewlett Packard Company. With the growing requirements for High Availability and the limited windows of opportunity for proactive and/or reactive system maintenance, understanding the internal Escalation process within HP's Escalation Team will help customers with their internal communication as well help set expectations with everyone involved.

Hewlett-Packard's Worldwide **Escalation Process** is central to Hewlett-Packard's philosophy of world-class support. This process facilitates solutions to complex problems by HP's technical resources. As a result, the customer's technical resources can remain focused on achieving business goals. The escalation process provides a consistent worldwide support delivery model for solving complex problems quickly and efficiently. The delivery model defines triggers for the escalation processes and roles and responsibilities of members of the HP escalation team. The escalation team provides technical and managerial expertise beyond the standard. The customer is an active participant on the team. The **Escalation Process** is initiated when normal H/W and S/W support channels cannot resolve an issue in a reasonable time per HP and/or the customers' expectations. Currently, an escalation is tracked internally by HP using an escalation number that looks like: **AMS00-0605-153423** [USA Only] (This is a time stamp of when the escalation was opened, June 5, 2000 3:34.23 pm est). You know you are officially escalated when you are given one of these numbers.

How does an Escalation get started?

Anyone within the HP Support Delivery Organization (Account Support Engineer, Customer Engineer, Remote Account Support Engineer, Response Center Engineer, Account Delivery Manager, Sales Representatives or the Customer may ask for an issue to be escalated at any time. Hewlett-Packard Company expects the HP Response Center to be engaged initially for problem resolution, however, an escalation can occur shortly thereafter due to any number of customer or HP concerns over the progress of the solution weighed against the Business Impact of the problem to the customer.

Before a escalation begins, a support call goes through the standard call management process which contains three levels. If a call cannot be resolved at its current level, HP is responsible for moving it to the next level. At each level, the solution process is reviewed, and the resources, communications or management involvement will be reset appropriately. These Levels include:

Active – A support call is active when it is logged to the HP Response Center. If the call cannot be resolved in a reasonable time, the call will be moved to a level 1.

Level – 1 Engineering review is initiated if the engineer cannot solve the problem in a reasonable time. An engineering review engages more specialized resources, reviews the situation and decides on a new action plan. If the problem cannot be satisfactorily resolved using the new action plan, the call moves to a Level 2.

Level – 2 When a call moves to a Level 2, Management Review is initiated. The problem is referred to a manager for review, the action plan is updated, and the customer is contacted. Unless an alternative plan can be identified, management will recommend moving the call to Level 3.

Level – 3 When a call is moved to a Level 3, the **Escalation Process** is initiated.

The **Escalation Process** includes the following steps:

- Escalation Process is Initiated
- Formation of an HP Escalation Team
- Development of a Technical Action Plan
- Execution of the Technical Action Plan
- Communication throughout Escalation
- Post Solution Monitoring
- Post Incident Review

The **Escalation Team** includes technical and management members from both HP and the customer. HP members of an escalation team always include the Customer Satisfaction Manager (CSM) and the Escalation Engineer. Additionally, a Customer Escalation Center Manager is assigned to each escalation. Other HP members may include a Worldwide Technology Expert Center (WTEC) Manager and WTEC engineer(s), local and remote HP Account Team members such as Customer Engineers (CE), Account Support Engineers (ASE) and Remote Account Support Engineers (RASE).

Customer Satisfaction Manager (CSM) represents the customer during the escalation process. Specifically, the CSM:

- Owns the problem and is responsible for customer satisfaction
- Leads the Escalation Team
- Obtains resources
- Obtains customer approval for the Technical Action Plan
- Ensures that both the customer and HP management are properly informed throughout the escalation

The **Escalation Engineer** develops, documents, communicates and co-ordinates implementation of the Technical Action Plan with the customer. The Escalation Engineer:

- Identifies needs for additional technical assistance
- Monitors progress of the escalation and provides regular updates to the escalation team
- Provides on-site assistance, if necessary
- Ensures solutions are delivered to the customer in a timely manner

The **Escalation Manager** owns the escalation process and:

- Ensures local process understanding and adherence
- Is a CSM resource for high priority escalations

The **Worldwide Technology Expert Center** (WTEC) **Engineer** provides:

- Specialized technical expertise and works directly with the HP Lab engineers

The **Worldwide Technology Expert Center** (WTEC) **Manager**:

- Ensures that an appropriate WTEC Engineer is engaged and prioritizes WTEC and Lab resources

Customer Escalation Team Members Include:

The Customer Management contact is the primary Customer contact for Management issues.

The Customer Technical contact is the primary Customer contact for Technical issues.

The Escalation Team develops the **Technical Action Plan** which should include:

- Actions required to solve the problem
- Who is responsible for each action
- Timing for each action
- Alternative plan if the desired results are not achieved
- Why a specific action will be performed
- Next communication date/time

Post Solution Monitoring

Following the completion of the Technical Action Plan, the escalation team will monitor the situation for an agreed upon period until the customer and HP are satisfied that the problem is resolved.

Post-incident Review

As the final step in the process, the escalation team will review the escalation, identify successes and introduce improvements where required.

Customer Expectation Management

HP's call management process operates under the umbrella of Customer Expectation Management, which maximizes customer satisfaction by facilitating good communication. It requires that HP first understand the customer's needs and the impact of the problem on the customer's business. The customer and HP must agree on the definition of the problem, division of responsibilities, an acceptable timeframe and the criteria for problem resolution. The customer and Hewlett-Packard communicate regularly until the problem is solved. This process continues through all phases of call management.

Tips for Customers

- Understand and be able to communicate technical issue
  A) What is broken?
  B) What is not working as expected?

- Communicate Customer Timelines for resolution to the HP CSM and Escalation Engineer
- Communicate Business Impact of issue to HP CSM and Escalation Engineer
  A) Help HP define acceptable criteria for problem resolution

- Maintain documentation of calls placed to HP (names, date/time, internal action plans)
- Maintain documentation of Hardware service calls (HP usually provides log book)
- Provide Technical and Management focal point contacts with phone numbers
- Purchase appropriate level of HP Support to meet your business requirements

Best Practices

Ensure:

- Through, accurate and current documentation of:
  A) Hardware Configurations
  B) Software Configurations
  C) Online copy and paper copy of documentation

- Online Diagnostics installed and functional (HP CE's can help with this activity)
- System Backup Strategy in place and working
- S/W Patch Strategy in place and documented "online" with HP Account Team
- Remote Access available
- Disaster Recovery Plan (DRP) in place and Tested

Escalation Process expectations with CSS & BCS support

Only Critical System Support (CSS) and Business Continuity Support (BCS) customers have 24x365 access to HP's WTEC resources. Customers who have partnered with HP by purchasing a support contract based on these two Mission Critical Products can expect HP will engage resources faster, while benefiting from a higher priority in the Worldwide Technology Expert Center (WTEC) and the HP Lab.