

When It Breaks

Outage and escalation plays for support and CS

Free sample: 3 complete plays. From Draft First. Written by a customer success and support lead.

Welcome

Engineering already has well-known incident tools: Statuspage-style phase updates, PagerDuty-style on-call and the Incident Command System's roles. This book names them once and then stays on the other side: the support queue, the account calls, the credit requests, the after letter and the executive who writes to your CEO. It's for the people answering the customers, not the people fixing the system.

Each play starts with the situation and how you'll notice it, explains what tends to go wrong and why, then gives you the move, the words to say and write, decision rules, mistakes to avoid and an agent prompt that does the gathering and first draft while you handle the people.

Three ideas run through all of it. Say what you know, and only what you know. Give a time for the next update, and keep it. And never promise what you can't keep: no fix times you don't have, no causes you haven't confirmed, no credits that haven't been approved.

The full playbook has 24 plays

- 1. Spot the cluster
- 2. Open the parent ticket
- 3. The holding reply (in this sample)
- 4. Tell engineering what customers see
- 5. Update on time, even with no news
- 6. One voice for the wording
- 7. Big accounts hear it from you (in this sample)
- 8. Internal FAQ for the front line
- 9. Questions you must not answer yet
- 10. The all-clear message
- 11. The after-incident letter
- 12. The big account debrief call
- 13. Credit and SLA requests (in this sample)
- 14. Goodwill beyond the contract
- 15. Close the duplicate tickets right
- 16. Exec complaint to your CEO
- 17. Single owner, single thread
- 18. Define done at the start
- 19. The steady update rhythm
- 20. Escalation recap and close
- 21. Support's part in the post-incident review
- 22. Macro pack refresh
- 23. Support seats for incidents
- 24. Weekly escalation patterns

This sample has three complete plays. The full playbook has all 24, a which-play map, an outage timeline from support's side, a worked incident from start to finish, adjustments for messy incidents, twelve templates including the full macro set, the queue math sheet and a filled after-incident letter, decision tools with starting defaults for cadence and credits, worked credit calculations, judgement calls, an exec escalation from start to finish, two incidents that went badly, bad agent drafts with the errors marked, a reopen and complaint signals worksheet, and an agent prompt for every play.

The holding reply

SITUATION	Customers are writing in before anyone knows the cause.
SIGNAL	Any ticket about a suspected or confirmed incident, before there's a real update to give.

What's really going on

In the first hour, people want two things: to know you know, and to know when they'll hear more. They don't need the cause yet, and guessing at it creates problems you'll spend days cleaning up. A good holding reply says you're aware, says what you've seen, doesn't guess, and gives a time for the next update. That last part matters most. It turns "we'll keep you posted" into a promise you'll keep.

The move

1. Use one approved holding reply for everyone, from your macro set.
2. Confirm what you've seen, in the customer's terms.
3. Don't give a cause, a fix time or a workaround that hasn't been confirmed.
4. Give the next update time, and make it a time you can definitely meet.
5. Link to the status page if there is one.
6. Put a reminder in the parent ticket for the next update time.

Say it like this

ON THE PHONE

Thanks for calling. We're seeing this too, and the team is working on it now. I don't have a cause yet and I don't want to guess. I'll update you by [time], even if it's just to say we're still working on it.

IF THEY PUSH FOR A FIX TIME

I understand, and I wish I could give you one. I'd rather not give you a time I can't keep. What I can promise is that you'll hear from us by [time].

Write it like this

Subject: We're looking into [symptom]

Hi [name],

Thanks for letting us know. We're seeing the same thing: [symptom in plain words]. The team is working on it now.

We don't know the cause yet, so I won't guess. I'll update you by [time and time zone], even if there's no news.

Live updates: [status page link, if you have one]

[your name]

Decision rules

- Every holding reply gives a next update time.
- Starting default: updates every 30 minutes while it's broken (see the cadence table in the decision tools). Shorter is fine if you can always keep it; never promise a time you can miss.
- If a workaround is confirmed by engineering, add it. If it isn't confirmed, leave it out.

Watch for

- "We're experiencing some issues" with no detail. Say what's broken.
- Guessing at the cause, even helpfully.
- "We'll update you soon." Soon isn't a time.

Agent draft prompt

Paste after the standing rules from the front of the book. The agent drafts; you check and send.

Draft a holding reply for [symptom], using these facts only:
[confirmed facts from incident channel].
Include: we're aware, what customers are seeing (from [example ticket quotes]), that the cause isn't known, next update by [time and zone], link [status page].
Under 90 words. No cause, no fix time, no workaround unless it's in the confirmed facts.

CHECK THE DRAFT BEFORE IT GOES ANYWHERE

- No cause, no fix time, no data reassurance. Search the draft for "because", "should be" and "safe".
- The next update time is the one the writer set, with a zone.
- The symptom is in the customer's words, not engineering's.

PLAY 7 OF 24

Big accounts hear it from you

SITUATION Your most important customers are finding out about the outage from their own users.

SIGNAL An incident that affects a top account.

What's really going on

For a big account, hearing about an outage from their own staff, or worse, their own customers, feels like being forgotten. A short call or message from their account owner before they ask changes how the whole incident feels. It doesn't need a cause or a fix time. It needs specifics about how it's hitting them and a promise of the next update.

The move

1. Keep a list of top accounts that get a personal touch during incidents, agreed in advance.
2. When an incident is confirmed, the account owner contacts the main contact quickly: a call if you can, a message if not.
3. Say how it's affecting them specifically, if you know.
4. Give the same next update time as everyone else, and say they'll hear from you personally.
5. Log the contact on the parent ticket.
6. Check in again at each update or at least at the all-clear.

Say it like this

THE CALL

Hi [name], it's [your name]. I wanted you to hear this from me rather than from your team. We have an issue affecting [what], and I can see it's hitting your [team or use]. The team is working on it. I don't have a cause or a fix time yet, but I'll update you personally by [time].

IF THEY ASK ABOUT CREDITS

I understand why you're asking. Let's get it fixed first, and then I'll look at your agreement and come back to you. I won't forget.

Decision rules

- Call before they ask, if you can.
- Don't promise credits, causes or fix times.
- If you don't know their specific impact, say so and ask.

Watch for

- Calling with no facts and no next time.
- Overpromising to make them feel better.
- Calling only the accounts that complain.

POLICY CHECK | NOT LEGAL, SECURITY OR FINANCIAL ADVICE

Credits and compensation follow the customer's contract and your company's policy. Don't offer or estimate any during the incident. See Plays 13 and 14.

Agent draft prompt

Paste after the standing rules from the front of the book. The agent drafts; you check and send.

For incident [name], read [tickets linked to parent ID] and [top account list].

1. For each top account, say whether any of their users have written in, with ticket IDs and quotes.
2. Using [usage or product data, if connected], note which affected features they use. Label as likely impact, not confirmed.
3. Draft a short call script and a message for each account owner, with the account's specific impact, the next update time [time], and no cause, fix time or credit.

CHECK THE DRAFT BEFORE IT GOES ANYWHERE

- Each top account's list of tickets matches the parent ticket. Spot-check two.
- No promise of a call time the account caller can't keep.
- No mention of credits or contract terms on the call notes.

PLAY 13 OF 24

Credit and SLA requests

SITUATION A customer asks for a credit, refund or compensation after an outage.

SIGNAL A request for a credit, an SLA claim or a refund.

What's really going on

A customer asking for a credit may simply be doing their job, because their own finance team expects them to ask. Arguing about the wording first makes you look like you're dodging. The fair and fast approach is to check what the contract says, work out what's due, get it approved, and reply with the method and when it applies. If nothing's due under the contract, say so clearly and kindly, and consider Play 14.

The move

1. Acknowledge the request quickly and say when you'll reply with an answer.
2. Check the contract or SLA terms with whoever owns them: what's covered, how it's measured, how credits are calculated, any claim process.
3. Work out what's due using the contract's method, with the incident's confirmed times.
4. Get approval from finance or whoever your policy requires.
5. Reply with the amount, how it was calculated, and when and how it will appear.
6. Log it so the review can see the total cost.

Say it like this

ACKNOWLEDGING

Thanks for raising this. I'm checking your agreement now, and I'll come back to you with an answer by [date].

WHEN IT'S DUE

Under your agreement, the credit for this incident is [amount], calculated as [method]. It will appear on [invoice or date].

WHEN IT ISN'T DUE

I've checked your agreement carefully. This incident doesn't qualify for a credit under it because [reason, quoting the terms]. I know that's not what you hoped to hear, and I don't want to brush off the impact on your team.

Decision rules

- Check the contract before you answer, every time.
- Reply with the method, not just the amount.
- Never promise a credit before approval.

Watch for

- Arguing about the definitions in the SLA before checking.
- Stalling, hoping they'll forget.
- Offering more than the contract allows to make it go away.

POLICY CHECK | NOT LEGAL, SECURITY OR FINANCIAL ADVICE

Credits, refunds and SLA interpretation follow the customer's contract and your company's finance and legal policy. Have finance approve every credit, and send any question about contract interpretation to whoever owns contracts.

Agent draft prompt

Paste after the standing rules from the front of the book. The agent drafts; you check and send.

For [account name]'s credit request about [incident]:

1. From [contract summary or SLA document], quote the terms covering availability, credits, measurement and claims. If missing, write [CONFIRM WITH CONTRACT OWNER].
 2. From [incident timeline], quote the confirmed start and end times and affected services.
 3. Lay out the calculation the terms describe, step by step, with each input labelled [CONFIRM]. Don't decide whether the credit applies.
 4. Draft both reply versions (due and not due) using my templates.
- Mark the whole output [NEEDS FINANCE APPROVAL].

CHECK THE DRAFT BEFORE IT GOES ANYWHERE

- The contract wording is quoted, not explained.
- The calculation uses the confirmed incident times and shows each step.
- The amount is marked [NEEDS REVIEW] until finance approves.

Liked these?

The full playbook has 21 more plays like these, from the first ticket of an outage to the after letter, and from the exec complaint to a formal close, plus the macro set, seat card and review checklist. All sales are final.