
Approved Answers + Escalation Rule

A simple operating template so AI can draft fast without making promises your business cannot keep.

Owner (who updates this): _____	Last updated: _____	Version: _____
Where this lives: (Google Doc / Notion / PDF) _____	Who can edit: _____	Who can view: _____

How the team uses this (simple rule)

AI is allowed to draft messages, but every customer-facing answer must be based on an Approved Answer below. If the question is not covered, escalate to a human.

Escalation rule (copy/paste):

Escalate to a manager if: (1) it involves refunds, pricing exceptions, legal, safety, HR, or payments, (2) the customer is angry or threatening chargeback, (3) the answer is not listed in Approved Answers, or (4) you are not 100% sure.

Approved Answers (fill in the blanks)

Write answers in plain language. Keep them short. Include limits and exceptions.

Refunds and Returns

- When do we allow refunds?

Answer: _____

- Return window (days) and condition requirements?

Answer: _____

- Restocking fee or exclusions?

Answer: _____

Pricing and Discounts

- Who can approve discounts?

Answer: _____

- Do quotes expire? If yes, how long?

Answer: _____

- What is our policy on price matching?

Answer: _____

Scheduling and Service

- How do customers book or reschedule?

Answer: _____

- No-show / late cancellation policy?

Answer: _____

- Typical turnaround time (and what impacts it)?

Answer: _____

Delivery, Shipping, or Installation

- Delivery areas and fees?

Answer: _____

- Lead times and what counts as a delay?

Answer: _____

- Who is responsible for damage claims?

Answer: _____

Warranty and Support

- What is covered and for how long?

Answer: _____

- How do customers start a claim?

Answer: _____

- What is not covered?

Answer: _____

Optional: AI usage snippet (for your team chat)

When using AI to draft a reply, paste the relevant Approved Answer section first, then ask AI to draft a response in your tone. Do not paste customer lists, passwords, contracts, or bank information into any AI tool.

Disclaimer: This template is general operational guidance, not legal advice. Adapt to your business and requirements.