How to Bring an Issue Up the Chain: SBAR

Four steps. Thirty seconds. Whoever you are escalating to should know what is happening and what you need from them before you finish talking.

Why we do this

When you bring a problem to a manager, they should not have to figure out what you are asking. SBAR puts the conversation in a fixed order: situation first, context second, your read on it third, your ask last. It also means you have thought it through before you walk over, and most of the time that solves the problem before you need anyone.

The four steps

S — Situation
What is happening right now, in one or two sentences. Who or what is affected and what the actual problem is.

B — Background
Only the context the listener needs. What led up to this, what has changed recently, and what you have already tried.

A — Assessment
What you think is going on. You must have an opinion. A wrong guess is fine. "I'm not sure, but my best read is X" counts. Skipping this step does not.

R — Recommendation
What you want done and what you need from the person you are talking to. Approve something, decide between options, escalate to a vendor, or confirm your plan.

Example: a client server goes down

This is what a tech should be bringing to their lead or to Charles, Michael, or Adam. Read it out loud. It should take under a minute, and the answer back is yes, no, or "do this instead."

Situation	VSS's main server went down at 10:40. Nobody there can get to files or their practice software.
Background	RAID controller is throwing errors. I got it to boot once and it crashed again within five minutes. Last good backup completed at 2 a.m. The hardware is out of warranty.
Assessment	I think the controller is failing and it is not coming back reliably. Trying to nurse it along risks the array.
Recommendation	I want to bring the server up from last night's backup image and get them working from that within the hour, then order a replacement controller. I need you to approve running on the backup and sign off on the hardware spend.

Ground rules

- Use SBAR any time you need a decision, approval, or help from someone above you. Works in person, on the phone, or in a Teams message with the four letters as labels.
- Do not show up with only S and B. That is handing someone your problem. A and R are what make it yours.
- Keep Background short. If the listener does not need it to make the decision, leave it out.
- Put your ask in the Recommendation as a specific request. "What do you want me to do?" is not a recommendation.
- If it is urgent, lead with that. "This is a P1, here is my SBAR."