

CASE STUDY

IMPLEMENTING SALESFORCE ENTITLEMENTS & MILESTONES ENSURING SLA COMPLIANCE

Industry: B2B MSP

Solution: Salesforce Entitlements & Milestones Implementation

CHALLENGE

The client lacked a structured way to track and enforce Service Level Agreements (SLAs) within Salesforce. Without entitlement management, it was difficult to ensure timely responses and resolutions for customer cases, resulting in inconsistent service delivery. There was no standardised process to measure response times, monitor delays, or escalate breaches, leaving both customers and support teams without visibility or accountability against contractual commitments.



OBJECTIVES

The objective was to implement Salesforce Entitlements and Milestones to align case management with both standard contracts and customer-specific SLAs. The solution needed to capture key SLA metrics such as response time and resolution time, introduce transparency into case progress, and provide automated escalation to prevent SLA breaches, ensuring accountability and improved customer satisfaction.



SOLUTION

We implemented Salesforce Entitlements, configuring both standard and custom entitlements to match contractual obligations. Multiple milestones were created to capture SLA metrics, including first response, resolution time, waiting on agent, and waiting on customer. Automated timers and workflows were introduced to track progress and pause SLAs when appropriate. An escalation process was also set up to notify managers when cases approached or breached SLA thresholds, enabling proactive intervention and ensuring service commitments were met.

RESULTS

- Standardized SLA tracking with entitlements aligned to contracts
- Improved visibility into response and resolution times through milestones
- Reduced SLA breaches with automated escalation and proactive management
- Greater accountability across support teams, ensuring consistent service delivery
- Enhanced customer satisfaction through timely communication and resolution