

# Establishing a Managed Services Model for Salesforce Support

How Milestone Technologies implemented a cost-effective managed services model, improving Salesforce support and operational efficiency for a leading US-based tire and wheel retailer.

## The Background

The client, one of the largest independent tire and wheel retailers in the U.S., operates over 1,000 locations nationwide, offering a range of products like tires, wheels, sensors, lug nuts, and wiper blades, along with services such as tire installation and balancing. Founded in 1960, the company has grown significantly over the decades and engaged Milestone to enhance its Salesforce ROI.

The client was managing two separate Salesforce instances — the Enterprise edition and the Unlimited edition. The Enterprise edition supports Case Management and Marketing activities (leveraging Sales Cloud, Social Studio, and Reputation Studio), while the Unlimited edition is dedicated solely to Fleet Sales (using Sales Cloud).

## The Business Problem

The client faced significant challenges in maintaining their Salesforce platform due to quality issues caused by inconsistent practices from various stakeholders. Despite having several service providers, they lacked the strategic focus needed to drive Salesforce value beyond routine day-to-day tasks.

This highlighted the critical need for troubleshooting and resolution within their SLA to ensure smooth operations, alongside a more strategic approach to Salesforce that aligned with their long-term business goals.

## The Objective

The primary goal was to establish a managed services model to cater to the client's Salesforce support and maintenance needs in a cost-effective and scalable way.

### Key objectives included:

- Implement a managed services model to streamline Salesforce support and maintenance.
- Deploy a dedicated Salesforce team, utilizing both onshore and offshore resources, to perform support, maintenance, and enhancement activities for the customer's Salesforce platform.
- Provide flexible IT capacity for platform upgrades and application support for the Customer Care team.
- Identify value additions and implement continuous improvements in terms of cost, performance, scalability, and fault tolerance within the Salesforce platform.

## The Milestone Solution

Milestone recommended a comprehensive managed services model that addressed both day-to-day operations and long-term strategic goals in a cost-effective manner. The scope of work was outlined into two primary categories: Keeping the Lights On (KTLO) and Sprint-Based Capacity Management.

### Key highlights of the solution included:

- **Managing KTLO:** KTLO was crucial for platform maintenance, especially for critical 24/7 support systems that require continuous monitoring and incident management. Initially, 80% of the team's capacity was focused on KTLO, with 20% on business requirements. By streamlining SOPs, improving processes, automating tasks, and monitoring constantly, we reduced KTLO efforts to 60%, freeing up 40% of capacity for business requirements.
- **Sprint-Based Capacity Management:** In the new 60:40 ratio, the available sprint capacity, which increased to 40%, resulted in greater satisfaction from the business. This shift enabled the existing team to handle more business requirements efficiently. By clearing the backlog, implementing proper prioritization, and focusing on business-relevant enhancements, we have successfully increased capacity and improved overall efficiency, aligning with the company's strategic goals.





## The Result

Through the CoE, governance frameworks, and standardized SOPs, we optimized the time allocation from 80% on KTLO tasks and 20% on sprint-based activities to a more efficient 60:40 ratio. Within Salesforce, we deployed dashboards, reports, and automated monitoring systems, greatly enhancing operational efficiency.

These enhancements streamlined workflows, provided actionable insights, and aligned with the client's strategic goals. The improved efficiency boosted system performance, increased sales, and reduced issues, resulting in a more reliable and effective Salesforce platform that better supports the business's objectives.

### Key results achieved include:

- Optimized time allocation from 80:20 to 60:40 between KTLO and sprint-based tasks.
- Deployed dashboards, reports, and automated monitoring systems to enhance operational efficiency.
- Streamlined workflows and provided actionable insights that aligned with strategic goals.
- Improved system performance, leading to increased sales and reduced issues.
- Enhanced the reliability and effectiveness of Salesforce to better support business objectives.

## Key Learning

Establishing a Center of Excellence and governance frameworks was instrumental in achieving a 60:40 balance between KTLO and sprint-based tasks, emphasizing the importance of well-rounded team skills and capabilities. Beyond routine maintenance, the focus shifted toward generating value through increased efficiency and cost savings, ensuring continuous improvement.

Proactive team involvement was crucial to the project's success, with well-structured monitoring, measurement, and escalation processes ensuring risks were effectively managed. Additionally, transparent communication kept stakeholders informed at every stage, fostering alignment and timely decision-making. Together, these efforts ensured operational excellence and aligned teams with strategic business goals.

### In summary:

- Governance and CoE frameworks enabled a 60:40 balance in task allocation.
- Teams focused on driving value through efficiency improvements and cost savings.
- Proactive monitoring and communication with stakeholders ensured smooth operations and mitigated risks.



## Why Milestone

Milestone was chosen for its expertise in delivering tailored managed service solutions and its ability to align IT operations with strategic business goals. With a proven track record in Salesforce optimization and governance, Milestone's Center of Excellence (CoE) offered the client a well-structured approach to balancing maintenance with business requirements.

Our focus on efficiency, proactive monitoring, and value-driven processes ensured scalable support while improving operational performance. Milestone's ability to seamlessly integrate onshore and offshore resources further enhanced the client's Salesforce operations, enabling long-term cost savings and improved platform reliability.

## About Milestone

Milestone Technologies is a leading global IT services and digital solutions provider that collaborates with organizations worldwide to revolutionize their technology infrastructure and digital capabilities.

With a strong commitment to innovation and customer satisfaction, we empower businesses to accelerate their digital transformation journey and unlock new opportunities for growth and success.

By leveraging our extensive expertise in cutting-edge technologies, we provide companies with the agility and scalability needed to stay ahead in today's rapidly evolving digital landscape.

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