Meet your service goals with SLAs and entitlements

Give service reps the info they need to deliver great service with Microsoft Dynamics CRM

for Service Managers

give your service team the right info at the right time

In Microsoft Dynamics CRM, service level agreements (SLAs) and entitlements help you clearly define the service levels and terms for your customers.

Then, when your service reps are working with a customer, they can see right away what type of service that customer is eligible for, and they can ensure that the customers get the best service possible.

Note: If your organization is brand new to Microsoft Dynamics CRM, you get these customer service features automatically. Existing organizations get these features when they apply product updates. For details about product updates, [take a look at this article](#).

measure how your team is doing

SLAs let you clearly define various metrics (also known as key performance indicators or KPIs) to measure the performance of your service team.

For example, you can set conditions to have your service reps:

- Resolve high priority cases for premium customers within 1 day
- Resolve cases with normal priority in 3 days

To help service reps monitor how they're doing as they work on their cases, you can define what actions to take when a deadline for KPIs is nearing (called "warning actions"), or when a service rep doesn't meet the goal (called "failure actions").

help your team resolve cases on time

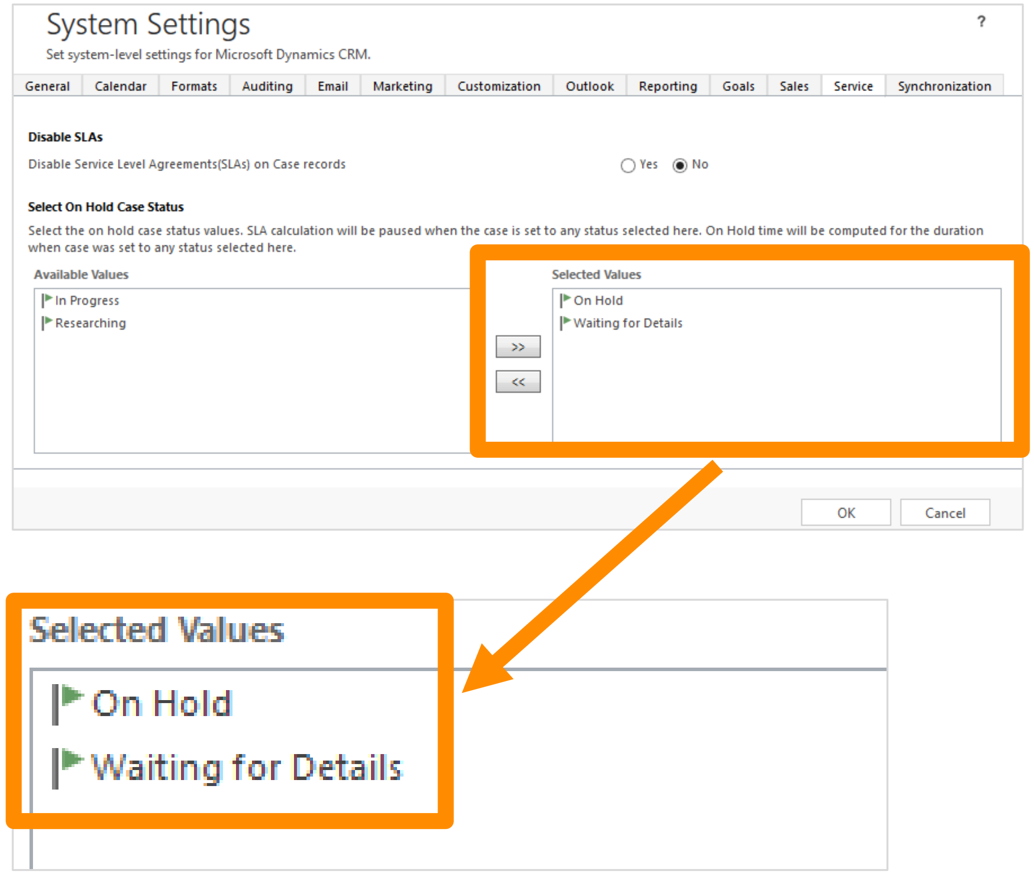
While they work with a customer, service reps can see at a glance if the customer is entitled to support for the product or service they purchased.

With SLAs and a countdown timer, service reps can see how much time they have to resolve their cases, and know which ones to tackle first.

pause the KPI countdown

When your service reps are waiting for information, give them a way to stop the SLA clock.
Do this by setting up the SLA to pause when cases are set to specific statuses like “On Hold” or “Waiting for Details”. You can define these statuses in **Settings** > **Service Management** > **Service Configuration Settings**.

This way, whenever the case is set to one of the on-hold statuses, the SLA timer stops temporarily.



Note: The pause and resume feature is supported only with enhanced SLAs that are available if you've installed the CRM Online 2015 Update. For CRM on-premises organizations, enhanced SLAs are available if you've updated to CRM 2015.

define the amount of support allowed based on what a customer buys

Based on what your customers purchase, you can create entitlements to define how much support your customers are eligible for.

When a customer calls, the service rep sees:

- If the customer is eligible for support
- If the customer has any support left
- Whether the channel (for example, email or phone call) the customer used to contact the service team is supported under the entitlement

And, because service reps know when entitlements are running out, you may be able to improve service revenue by training service reps to let your customers know when it’s time to renew.

speed up customer service with default entitlements

In the latest version of CRM Online 2015 Update 1, service teams can set an entitlement as the default entitlement for a customer. When an agent creates a case, the default entitlement is automatically associated with the case, saving time for the agent.

In cases where entitlement terms are incorrectly deducted (a faulty part is installed, for example), service agents can also credit back entitlement terms so the customer isn't charged.

let's look at an example

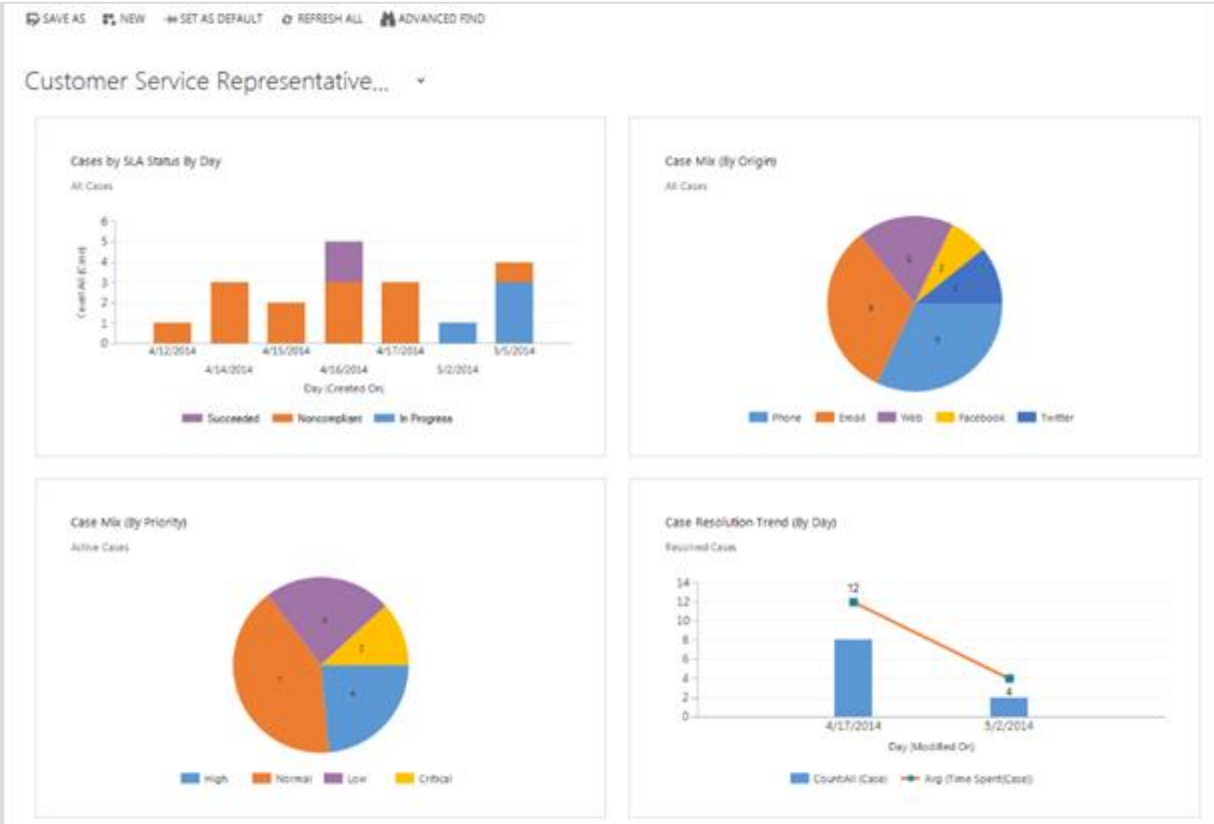
Contoso, a consumer electronics company, sells 3D printers.

Using entitlements, they offer amounts of support like this:

- Premium customers who buy three printers are eligible for 200 cases per month. Cases can come from phone calls, email, Facebook posts, and Twitter.
- Standard customers who buy one printer are eligible for 100 cases per month. 50 of these cases can come from phone calls, and 50 from email. None can come from social media sources.

As they handle cases, Contoso service reps see immediately if they're working with a premium or standard customer, where the case came from, and how many cases are left.

track your team's progress on the dashboard

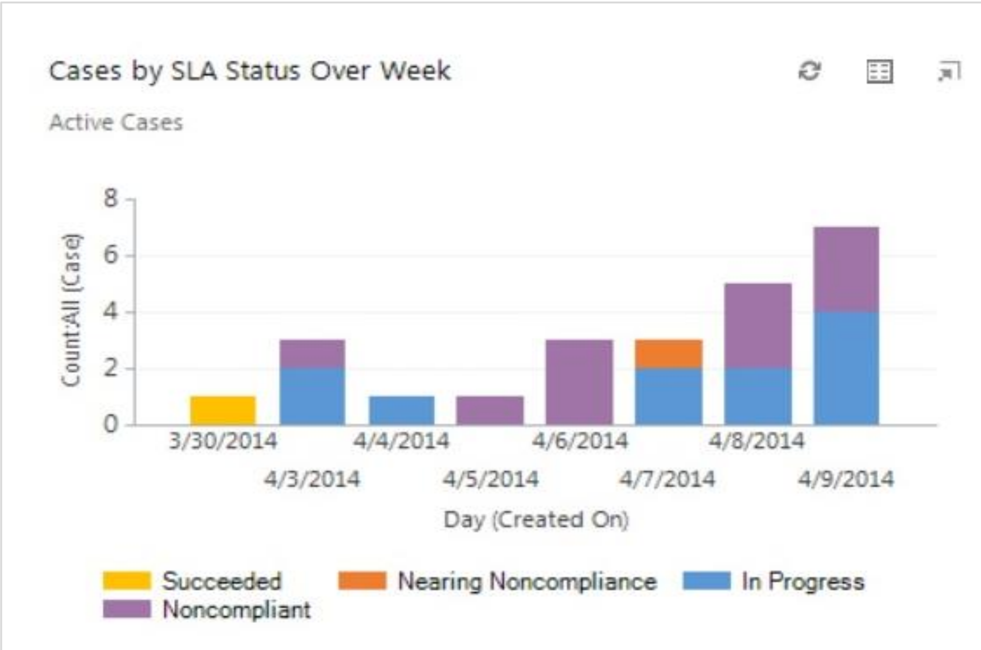


You can keep track of how your service team is doing by taking a look at your dashboard, which includes charts and graphs that give you a quick snapshot of key performance metrics.

Keep tabs on things like how many active cases your team is working on, and how they're doing meeting their service goals.

To get to the dashboard, from the nave bar go to **Service** > **Dashboards.**

see how many cases are running out of time



Here's an example of a chart that shows you how many cases are getting close to their SLA deadline.

You can also see how many cases were resolved on time, how many your agents are working on, and for how many cases the SLA deadline wasn't met.

This chart is called **Cases by SLA Status Over Week**.

know whose entitlements are expiring

You can also keep track of your customers’ entitlements on your dashboard.

The **Entitlements Expiration** chart shows you the number of cases or number of hours of support remaining for a customer.

Use it to get an idea about the customers whose entitlements are expiring, so you can get in touch with them to renew their entitlements.

how to set up an SLA

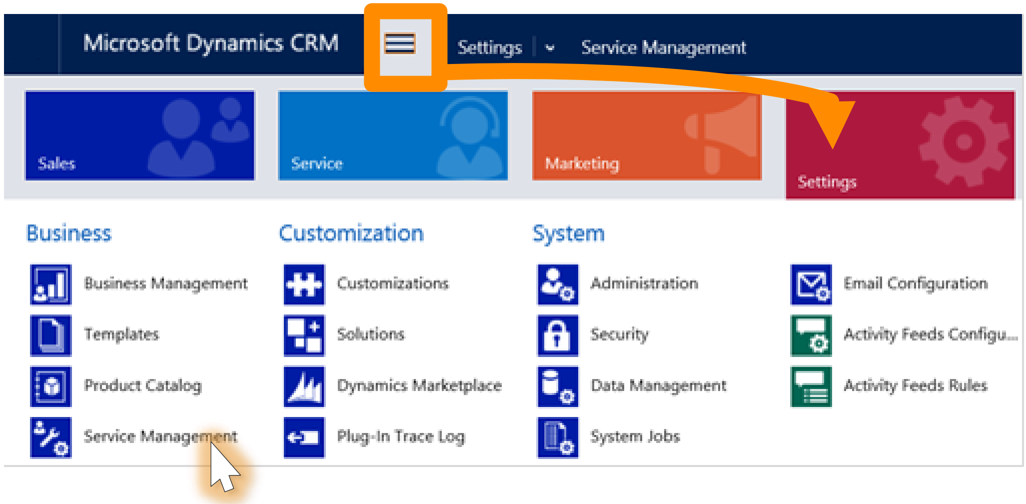
You're probably ready to set up your own SLA.
Let's take a look at an example.

go to SLAs

You'll find SLAs under **Settings**, in the **Service Management** area.

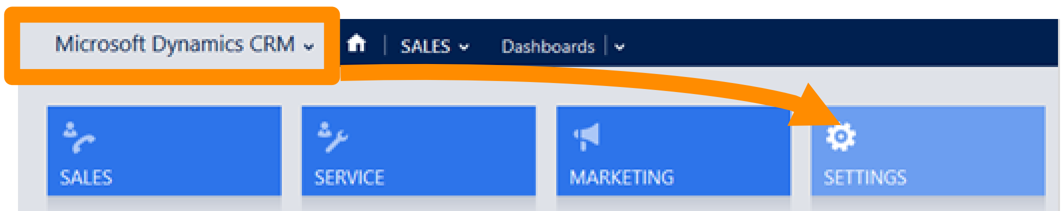
If your screen looks like this (latest version):

On the nav bar, choose **Settings**, go to **Service Management**. Choose **Service Level Agreements**.



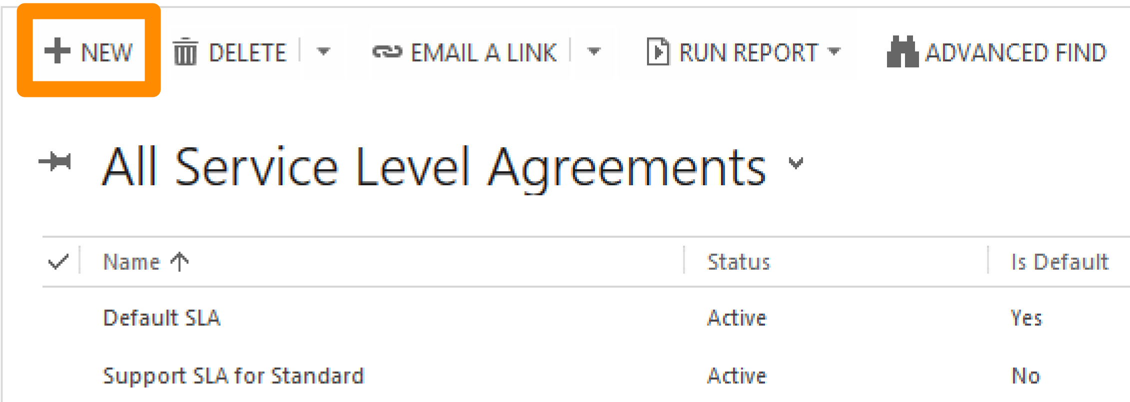
If your screen looks like this (older versions):

Choose **Microsoft Dynamics CRM** > **Settings** > **Service Management**. Choose **Service Level Agreements**.

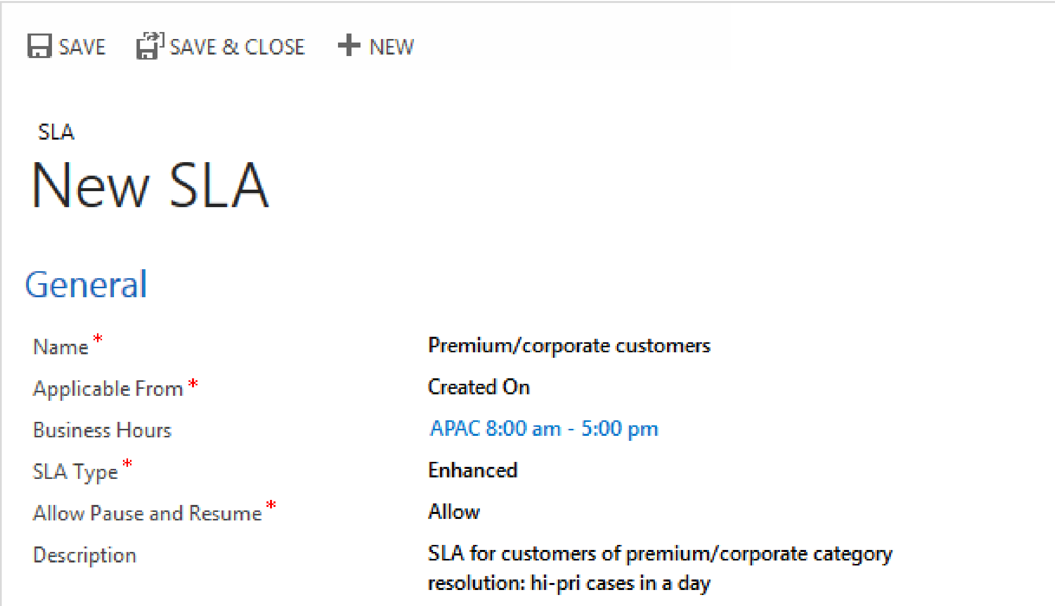


create a new SLA

First, you'll create a new SLA. Choose **New**.
(**Tip**: You can also edit an existing one by clicking the name in the list.)



fill in some details about the SLA



Here are a couple of tips:

In the **Applicable From** field, select the event that triggers the start time for the SLA metrics. You can choose to begin measuring from the time a case is created, changed, resolved, or escalated.

Use the **Business Hours** field to ensure that the correct hours are considered for calculating the SLA timelines.

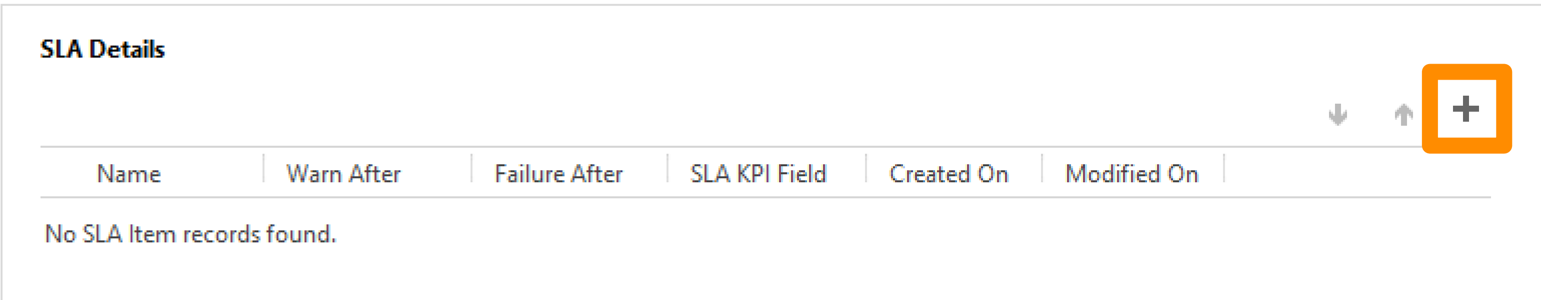
In the **SLA Type** field, select **Enhanced** so you can set up the SLA to pause based on certain case statuses.

After you're done adding the details, click **Save** at the top of the screen.

add the KPIs you want to measure

You can track your service levels based on key performance indicators (KPIs) like:

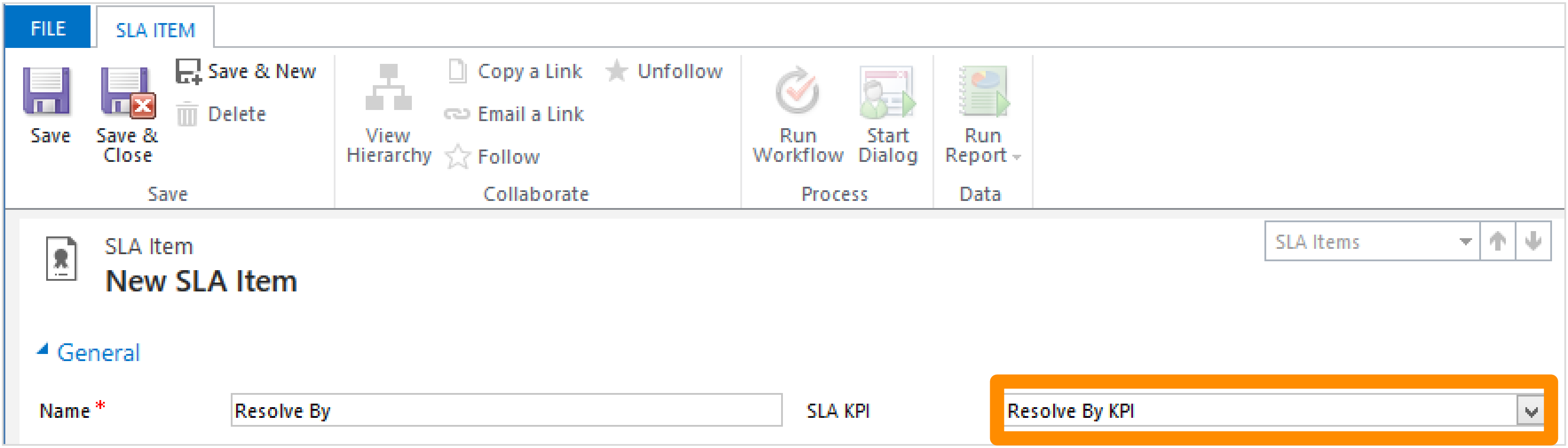
- Case resolution time
- Follow up time
- Time allotted to first respond to the customer



First, choose the **Add** button + to add the KPIs.

select what you want to track

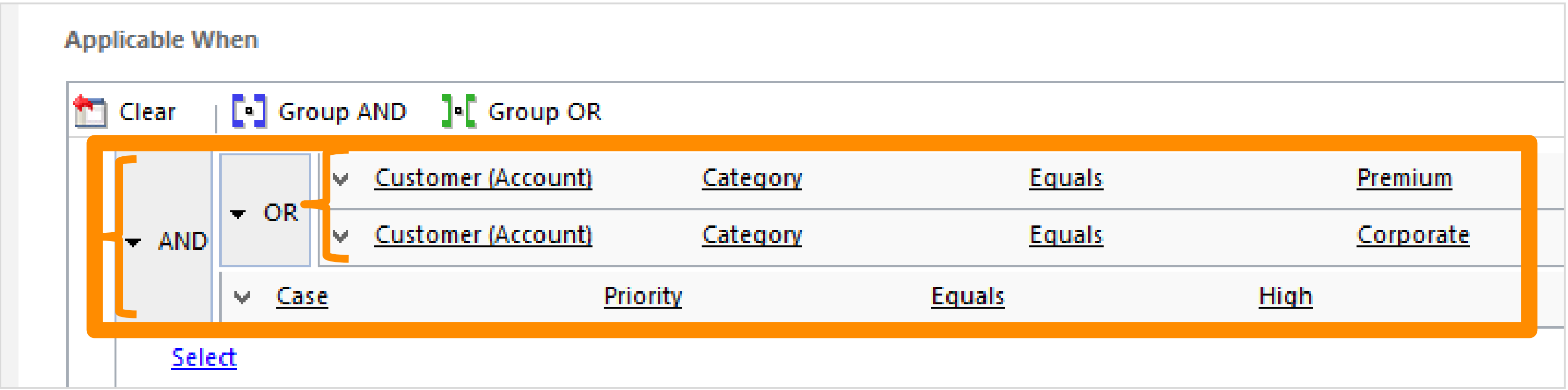
You need to choose which KPI you want to use to evaluate SLA success. In this example, we'll select **Resolve By KPI** to track if cases are being resolved in a timely manner.



set which types of cases the SLA applies to

Next, add conditions if you want to apply the SLA only to certain types of cases.

In this example, we'll apply the SLA to **Premium** or **Corporate** customers where the case priority is **High**.

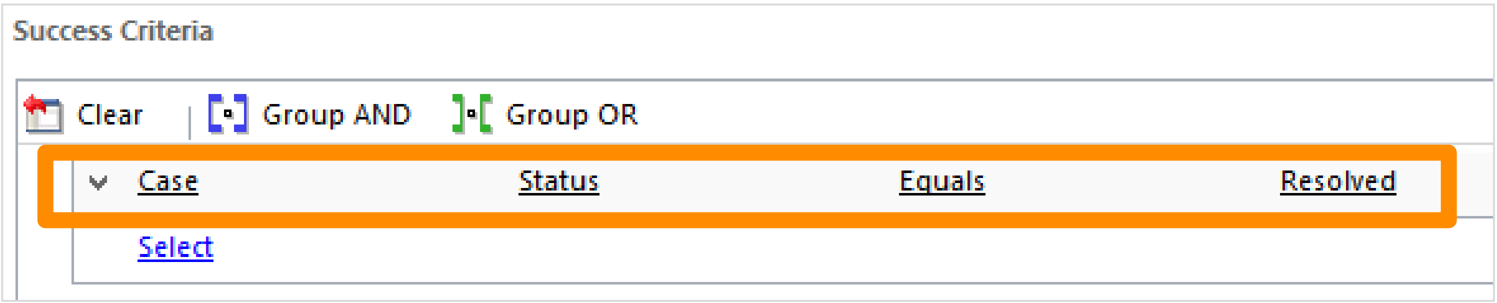


Tip:
You can add more than one condition:

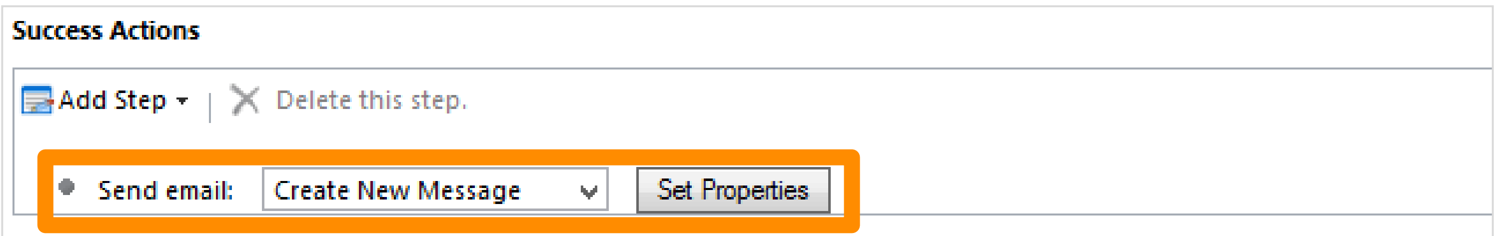
- Group with OR if you want the SLA to apply when at least one of the conditions is met.
- Group with AND if you want the SLA to apply when all conditions are met.

set the goal of the SLA

Then determine the end goal you want your service reps to achieve. In our example, the end goal is that cases are resolved on time.

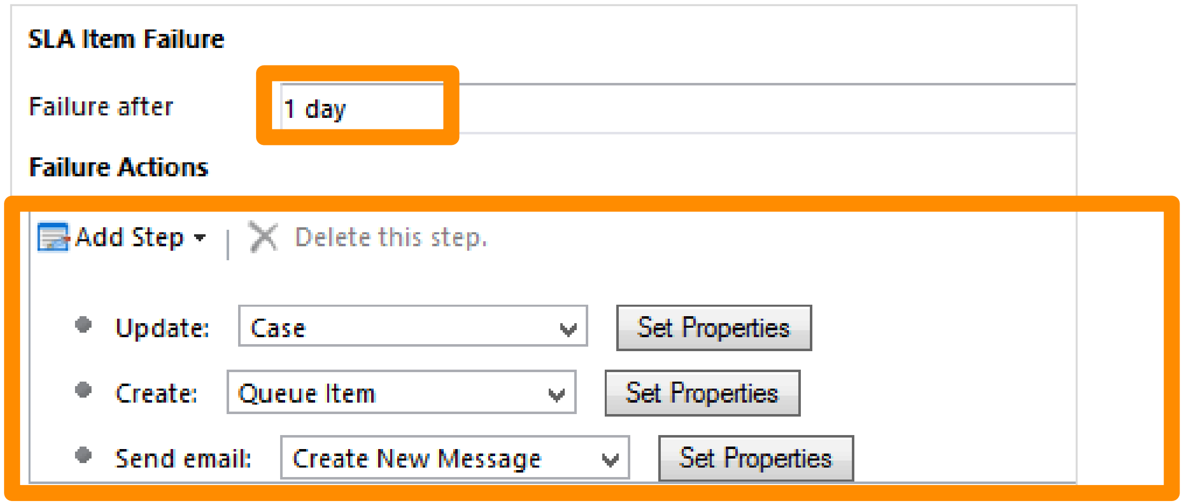


You may also want to do some actions when the success criteria is met. For example, send an email to your service team when they meet the resolution goals on time. To do this, add a success action.



Note:
You can add success actions only for enhanced SLAs.

set how much time service reps have to meet the KPI



Set the amount of time in minutes, hours, or days.

Then define what happens if the SLA goal isn't met. For example, you could:

- Send email to stakeholders
- Update some case properties automatically
- Assign the case to another queue

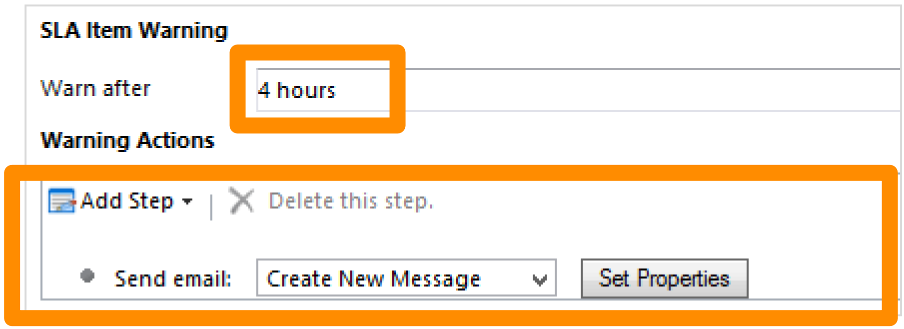
In our example, we'll send an email.

Note:

In our example, the number of days is calculated from the day the case is created because we selected **Created On** in the **Applicable From** field.

let service reps know when they're running out of time

In our example, we'll send a warning to the service rep 4 hours after the countdown starts.



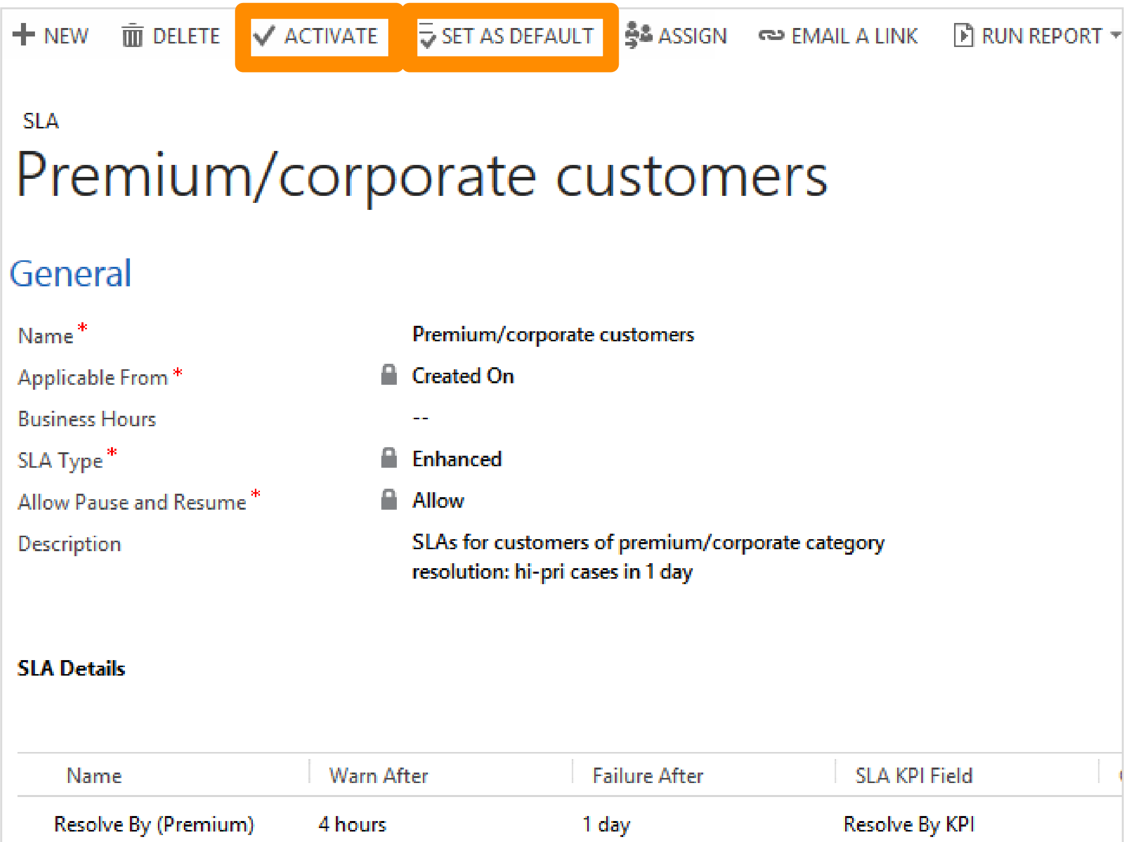
Specify when to trigger the warning. In this case, it's 4 hours after case creation.

Then choose what happens next. You can choose actions like:

- Send email to the service rep
- Change some case properties automatically, like setting the SLA status to Nearing noncompliance

In our example, we'll send an email.

activate the SLA



When you're ready, click **Activate** so that the SLA calculations start on applicable cases.

You can choose **Set as Default** if you want to set the SLA as the default for your organization.

how to set up an entitlement

Your SLAs are now in place.

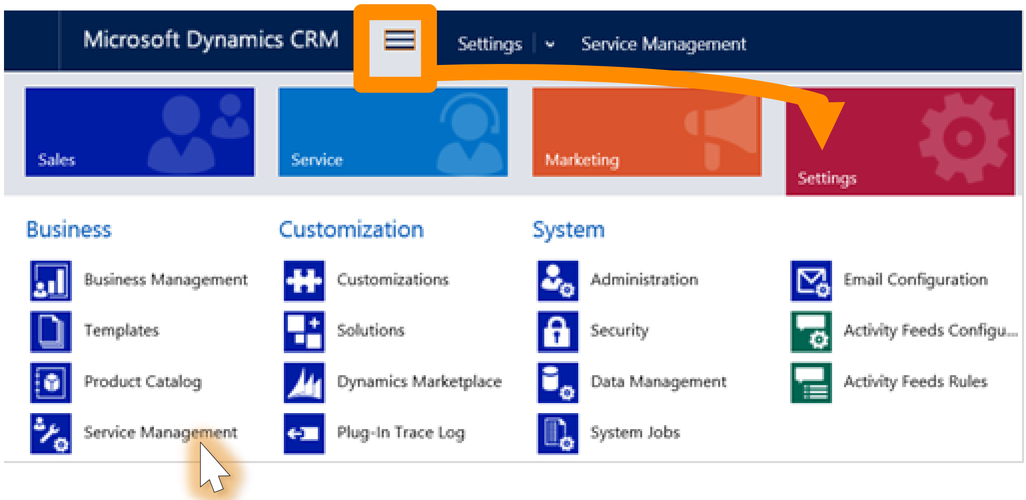
Now let's see how to set up an entitlement.

go to entitlements

You'll find entitlements under **Settings** in the **Service Management** area.

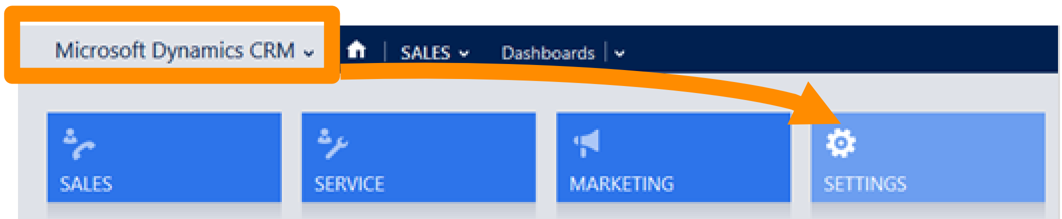
If your screen looks like this (latest version):

On the nav bar, choose **Settings**, go to **Service Management**. Choose **Entitlements**.



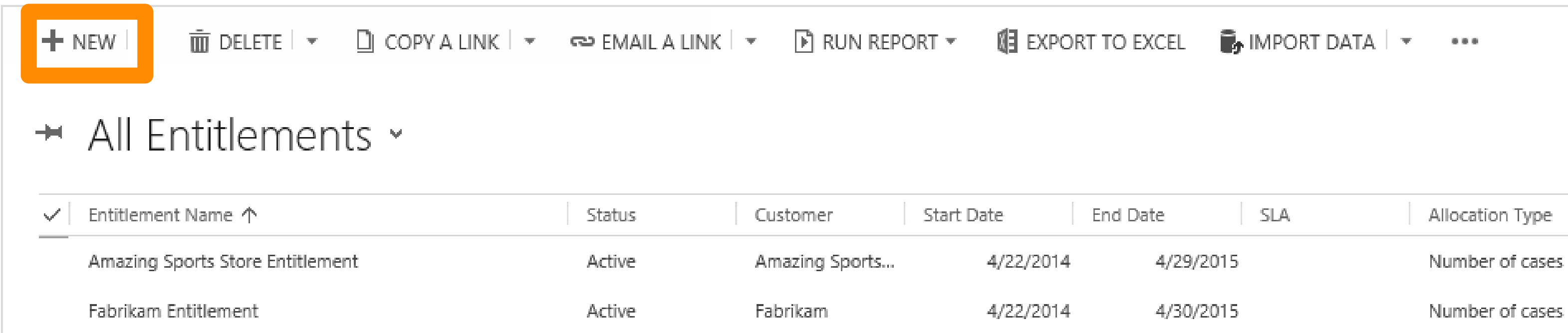
If your screen looks like this (older versions):

Choose **Microsoft Dynamics CRM** > **Settings** > **Service Management**. Choose **Entitlements**.



create a new entitlement

Choose **New**.
(**Tip**: Or click a name in the list to edit an existing one.)



fill in some details about the entitlement

ENTITLEMENT

New Entitlement

INFORMATION

Name *	Premium entitlement
Primary Customer *	Lucern Publishing
Start Date *	12/1/2014
End Date *	11/30/2015
Restrict based on entitlement terms *	Yes
SLA	Premium/corporate customers
Owner *	First name Last name
Description	--

Here are a couple of tips:

- Use the **Start Date** and **End Date** fields to select when the entitlement is valid.
- You can restrict service reps from creating cases for this customer if their entitlement terms are over.
- If you want to offer a specific level of service to the customer, select the SLA to use. Otherwise, the default SLA will apply.

track the amount of support to give

After you fill in the basic details, define the total amount of support you'd like to offer to the customer.

ENTITLEMENT TERMS

Allocation Type *	Number of cases
Decrease Remaining On *	Case Resolution
Total Terms	200.00
Remaining Terms	200.00

Choose how you want to calculate the amount of support; based on the number of cases, or the number of hours.

Choose whether the terms decrease when a case for the customer is created, or when a case is resolved.

In our example, the customer is allowed 200 cases, and hasn't used any yet.

add channels you'll provide support for

Email, phones, Facebook, and Twitter are considered "channels," or sources for support cases.

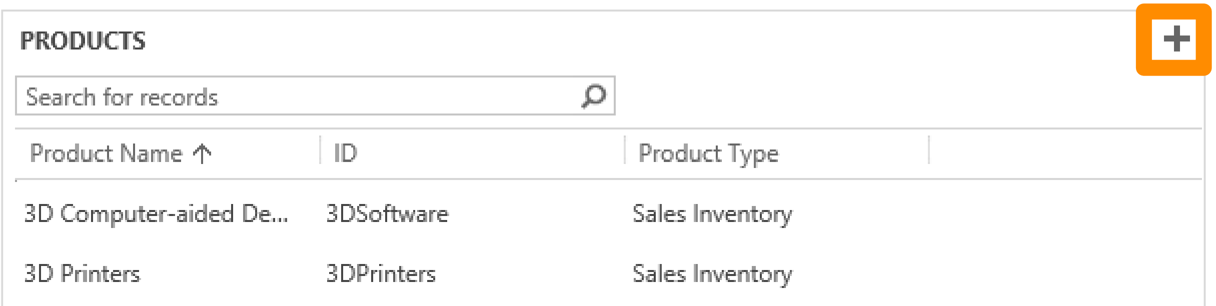
Choose the **Add** button **+** to add all the channels you want to offer support for, along with the amount.

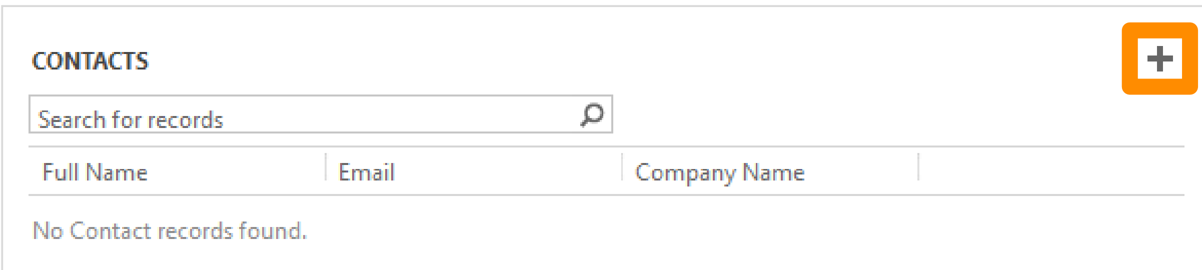
ENTITLEMENT CHANNEL +

Name ↑	Total Terms	Remaining Ter...
Email	70.00	70.00
Phone	70.00	70.00
Facebook	30.00	30.00
Twitter	30.00	30.00

select products and contacts entitled to receive support

If you want to offer support only for certain products, add them. You can also choose which customer contacts are entitled to receive support if only certain people are allowed.



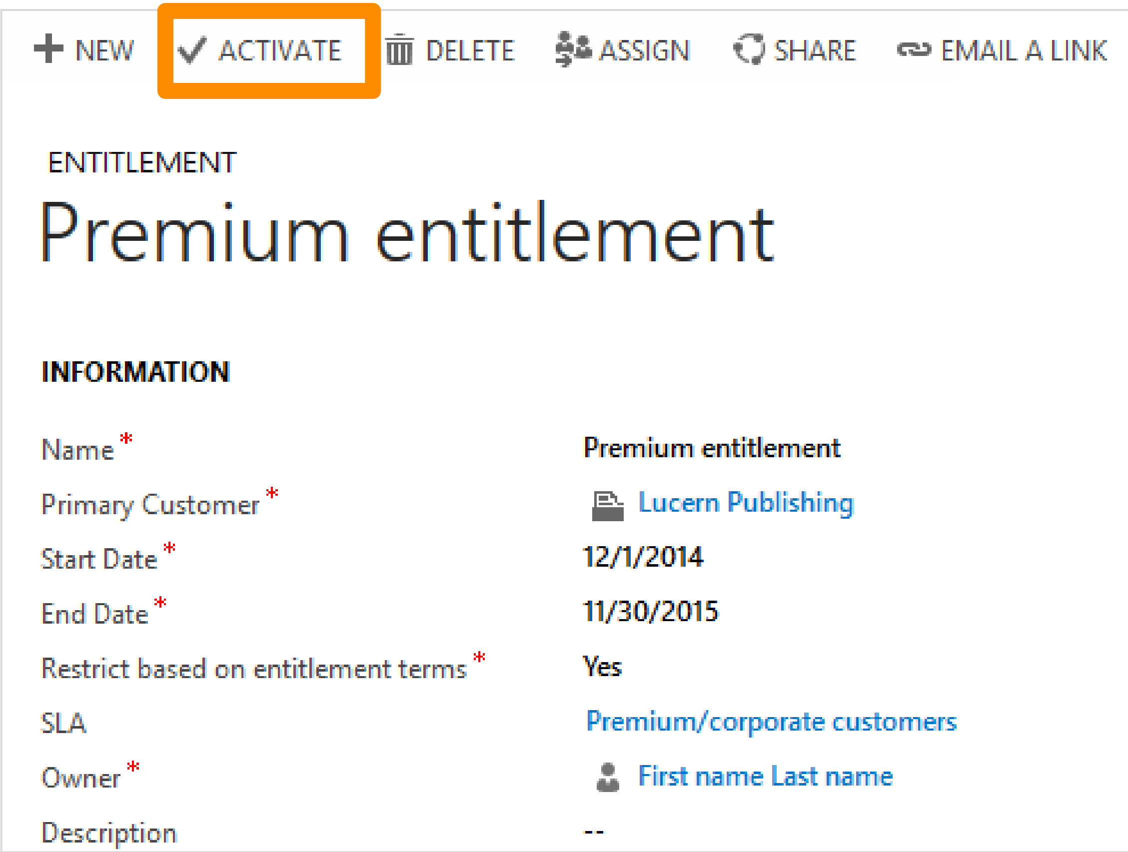


Choose the **Add** button + to find and select the product and contact.

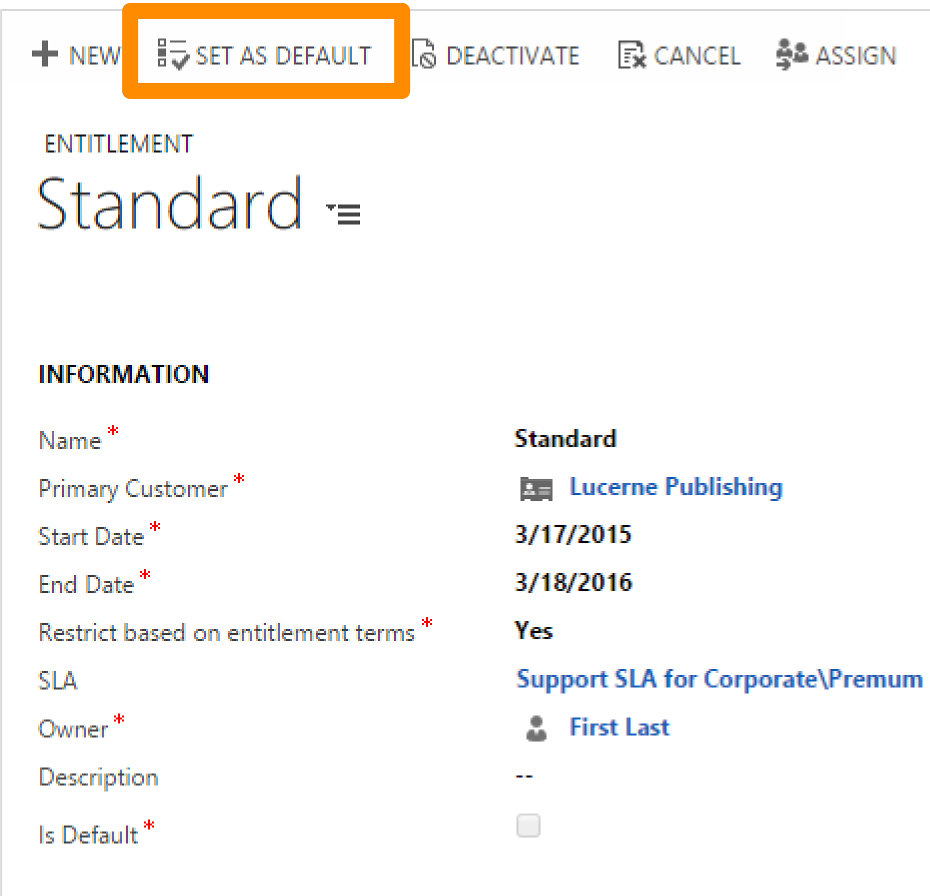
Note:
If you don't select a product or contact, the entitlement applies to *all* the customer's products and contacts.

activate the entitlement

When you're ready, click **Activate**.



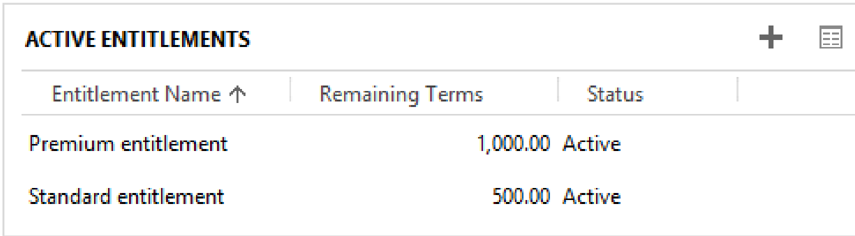
set as default entitlement



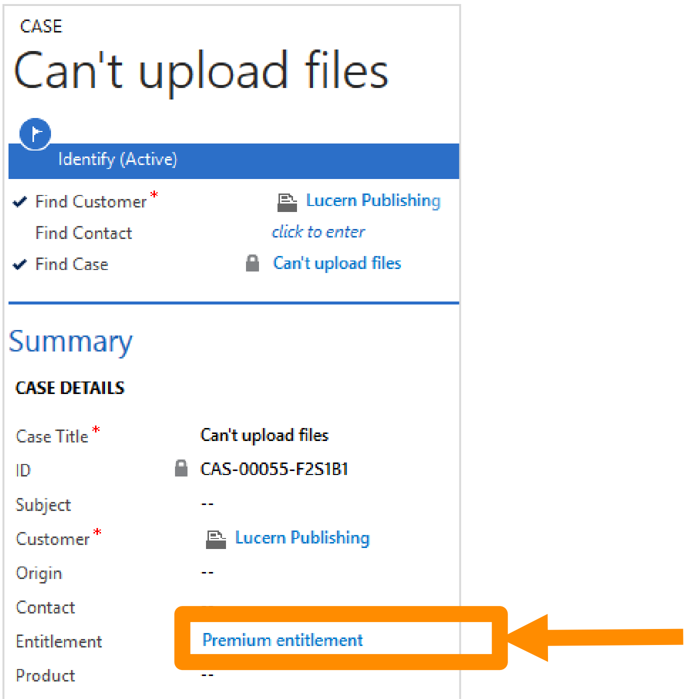
If your on the latest version of CRM Online:

- After you active the entitlement, you can set it as the default entitlement for this customer.

what your service reps see

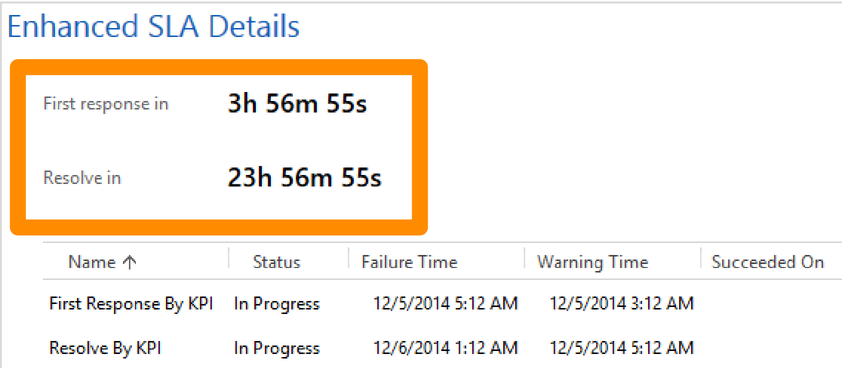


When a service rep creates a case for a customer, they can see all the entitlements that the customer has.

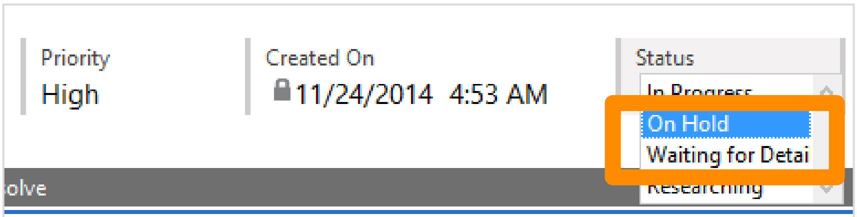


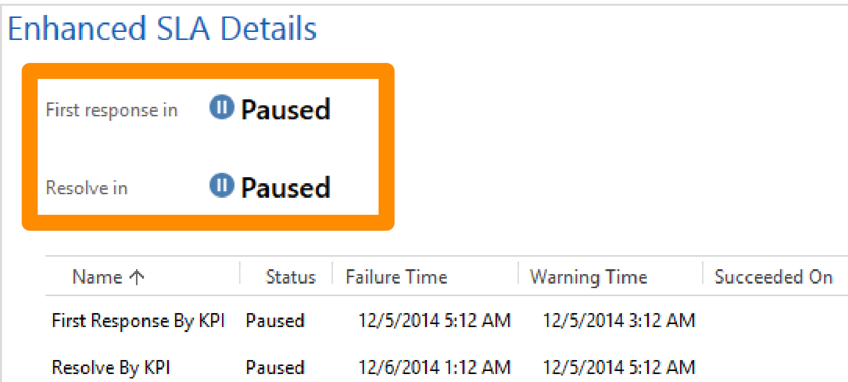
If they choose a specific entitlement, the SLA associated with the entitlement is applied. Otherwise, the default SLA is applied.

… what your service reps see



In the **Enhanced SLA Details** section, service reps can see the KPIs and the number of days and time they have to meet each KPI.





If a service rep changes a case status to one of the on-hold statuses, the SLA timer for the case pauses. The countdown resumes when the service rep moves the case to one of the active statuses.

Thanks for reading!

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We'd love to know what you think.

Help & Training Site

Version 7.1