SALESFORCE SUPPORT

What a month of support should cover

Whether Salesforce is looked after by a staff member, a freelancer or a partner, this is what a good month looks like: what gets done, how requests are handled, and what you should be able to see. Use it to check what you have, or to compare providers.

01 The everyday work

02 The specialist work

03 How good support is run

04 What you should see each month

05 10 questions for any provider

For
Anyone who runs or relies on Salesforce

Time to read
About 8 minutes

WHY THIS MATTERS

Many organizations use only part of the Salesforce they pay for

The reason is rarely the software. It is that nobody has the time to look after it: requests wait, reports drift out of date, automations nobody dares touch pile up, and the one person who understands it all becomes a single point of failure. Good monthly support fixes that, but only if it covers the right things.

01 · THE EVERYDAY WORK

Every month, without asking twice

- New users, leavers, permission and profile changes
- Fixes when something breaks or behaves oddly
- New reports and dashboards, and repairs to old ones
- Help and short training for staff
- Small improvements: fields, forms, page layouts, simple automations
- Keeping data tidy: duplicates, imports, old records

02 · THE SPECIALIST WORK

When one person cannot cover it

- Integrations with payments, events, email and accounting
- Automations that need careful design and testing
- Larger data clean-ups
- Advice before a bigger change, so it is planned, not patched
- Bigger changes scoped and quoted separately, so the monthly hours stay for the everyday

A quick test. List the five Salesforce requests that have waited longest in your organization. If good support were in place, how many would still be waiting next month?

03 · HOW GOOD SUPPORT IS RUN

1. **Every request is logged the moment it arrives,** with a case number you can quote, and a person picks it up the same business day with the next step.
2. **Urgent issues go first.** Anything stopping your team from working jumps the queue, and everyone knows the rule.
3. **You set the priorities.** The provider works from your list, not theirs, and tells you honestly what fits in the month.
4. **Everything is written down.** Every change documented, so the knowledge belongs to your organization, not to one person.
5. **You can see it all.** Every request, its status and the hours used, in one place, at any time.

04 · WHAT YOU SHOULD SEE EACH MONTH

A summary you can read in two minutes

If your support does not end each month with something like this, ask for it. Shown for a fictional association.

Monthly summary · September

Lakeview Association (fictional) · 40 hour plan

HOURS

38 of 40 hours used

27	3	1
requests closed	still open	urgent issue, fixed same day

WHERE THE HOURS WENT

- Everyday requests: 20 hours
- Renewal reminder automation: 9 hours
- Board dashboard rebuild: 5 hours
- Staff training, events team: 2 hours
- Monthly review and summary: 2 hours

WHAT CHANGED FOR YOU

- Renewal reminders now go out on their own at 90, 30 and 7 days
- The board dashboard updates itself; no more exports the week before the meeting
- 412 duplicate contacts merged

NEXT MONTH, YOUR PRIORITIES

- Event registrations into the member record
- Finance export for the auditors

WORTH KNOWING

- Two staff still use the old renewals spreadsheet. A 20-minute session would retire it.

And every quarter

A short review with leadership: what is working, what is next, and what to plan for, so bigger needs are budgeted, not discovered.

Signs it is not working

- You hear about hours only on the invoice
- The same problem is fixed twice
- Nobody can say what changed last month

What a good first month looks like

WEEK 1
A review of your Salesforce and a call to agree your list of priorities.

WEEKS 2 AND 3
The top items on your list fixed, alongside everyday requests.

WEEK 4
Your first monthly summary, and what the review found that needs a decision.

AFTER THAT
A steady rhythm: requests as they come, priorities from your list, a summary each month.

05 · BEFORE YOU CHOOSE

10 questions for any support provider

Including us. Good providers answer all ten without hesitation.

1	Who will actually do the work, and who covers when they are away?
2	How quickly is a request acknowledged, and how are urgent issues handled?
3	Who sets the priorities each month: us or you?
4	Where can we see every request, its status and the hours used?
5	What do we receive at the end of each month?
6	Is every change documented, and do we own the documentation?
7	What is included, and what is quoted separately?
8	Can we change our hours as our needs change?
9	Have you worked with organizations like ours, on our edition of Salesforce?
10	If we leave, what do we get to take with us?

HOW KLOUDSERV DOES IT

Salesforce support, every month, from a certified team

- A fixed number of hours each month; you set the priorities
- Every request logged instantly with a case number and picked up the same business day; urgent first
- In our support records for a national association, more than 94% of everyday admin requests were resolved within 24 hours
- Every request, its status and the hours used in our client portal
- A monthly summary and a quarterly review
- Everything documented, so the knowledge stays with you

Ask for the one-page outline