ESG SHOWCASE

What It Takes to Achieve Enterprise-caliber Salesforce Backup and Restore

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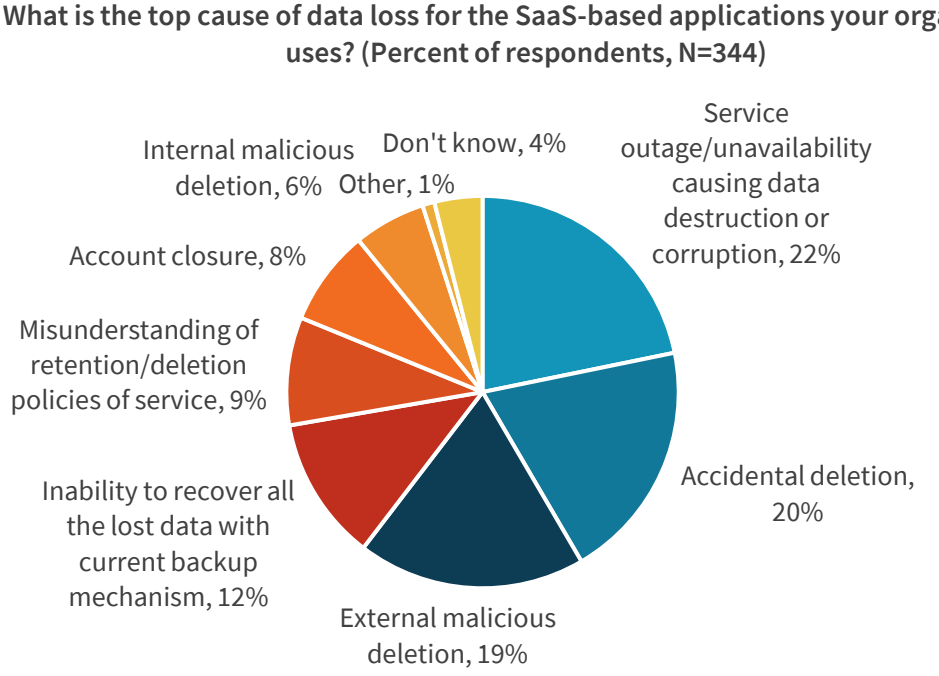
ABSTRACT: Too many organizations confuse availability of a SaaS service with the protection of the data in that service. The reality is that the Salesforce customer, not the vendor, is responsible for backing up this data. Organizations should consider the Odaseva platform, which is designed to help large-scale Salesforce customers excel at three disciplines of Salesforce data management: not just data protection, but also data privacy and data agility.

Overview

ESG has uncovered noteworthy findings related to what is now occurring in the SaaS data protection space. A disconnect in the market exists, and it is not going away. Consequently, a great deal of data is being lost due to user error, unanticipated external actions, and more (see Figure 1).[1]

Figure 1. Causes of Data Loss in SaaS Environments



Source: ESG, a division of TechTarget, Inc.

[1] Source: ESG Research Report, *The Evolution of Data Protection Cloud Strategies*, May 2021.

And that data can disappear surprisingly quickly. The reason? SaaS applications were not developed with backup in mind. With SaaS, nothing resides in an on-prem data center. Users have web-based access, but somebody else hosts, manages, and optimizes that data in infrastructure shared with many other clients.

However, your data remains your responsibility. That is where the disconnect arises.

ESG has found that more than one-third (35%) of organizations believe their SaaS vendor (e.g., Salesforce) is responsible for data protection. In addition, more than half (51%) believe this is a shared responsibility in which the organization is partially responsible for protecting the SaaS-resident application data, while also relying on their SaaS provider and a third-party data protection solution/service.

The truth is that the organization is *solely responsible*. Only 13% of the businesses ESG surveyed understood that fact.[2] Unfortunately, many organizations are confusing the availability of the SaaS service itself with the recoverability of the data that it holds. This confusion can lead to potentially serious business consequences.

A Sophisticated Platform Demands Sophisticated Protection

So, the question becomes: How does IT accomplish protection and recovery following a data-loss event? Significant challenges are associated with backing up and recovering Salesforce data. That is a big problem: Salesforce is not only a powerful application, but also a mission-critical one.

Salesforce can hold multiple data types, encompassing contact management systems, workflow and process data, and much more. For an organization to completely protect this application, it will need a solution that supports many types of records, files, and objects with the appropriate API-based protection scheme. The solution placed on top of Salesforce to protect an organization's data must be extremely powerful. There is a tremendous amount of inherent complexity in a Salesforce environment. Thus, you have to be able to analyze recovery points, test/validate your recovery jobs, and understand the impact of recovering a dataset.

For instance, say you're modifying a data model in Salesforce by adding a new column. Your backups then become obsolete. They are no longer compatible with the new model version. If you want to restore that data, you will need to transform the backup to make it compatible, too. Unfortunately, most Salesforce protection solutions do not support that function. Some businesses find that out too late.

Meeting Recovery Point Objectives for Salesforce Data

When it comes to Salesforce backup and recovery, you have to deliver on RPOs and RTOs, just as you do with on-prem workloads. Some organizations take that responsibility a bit too lightly. They perform daily backups and therefore assume that, at most, they would just lose one day of work. But imagine the potential impact of losing an entire day of sales leads or an entire day of open call center cases. For any highly transactional company, these events could significantly impact the bottom line.

Without a doubt, adhering to RTOs and RPOs is critical. Since its founding in 2012, Odaseva, a Salesforce data backup and recovery leader, has established a Salesforce protection baseline of four hours. But the Odaseva platform can back up critical objects every 15 minutes, as needed. This technical differentiator can have a real-world, business-level impact on achieving RPO—and that can be huge.

[2] Ibid.

Odaseva Security and Flexibility

Odaseva built its solution upon two principles: First, leverage major public clouds such as AWS and Azure, and second, respect the importance of security. This vendor understands that the data that organizations store in Salesforce is extremely business-critical. All the data passing through the server is encrypted multiple times at a granular level before being encrypted at rest. This means that Odaseva cannot see the data.

In terms of flexibility, it's important for organizations to have an effective means of extracting data to their own data lake or storage repository. When assessing Salesforce protection platform options, that kind of flexibility is vital. Again, you can't merely rely on a basic solution if you are protecting mission-critical Salesforce data. Choose a solution that can handle multiple duties—i.e., one that is able to facilitate data movement into and out of Salesforce to help you maintain adherence with data privacy laws and support analytics projects. In other words, look for a platform that is so powerful that it simplifies the complexity inherent to Salesforce.

Odaseva Intelligent Data Management

Typically, organizations initially require data backup/restore capabilities. However, if they are looking to extract maximum value from their Salesforce environments, they need a solution that also supports intelligent data management. The Odaseva Enterprise Data Platform for Salesforce delivers intriguing intelligent data management possibilities, including:

- Governor limit monitoring—Salesforce enforces what it calls "governor limits." These are usage caps that ensure efficient processing for multiple platform users without impeding performance. If your organization reaches or exceeds the governor limit defined by Salesforce, your system may be blocked. Therefore, it's imperative to employ a solution that can monitor those limits.

- Sandbox anonymization—It's essential that developers and other unauthorized users cannot access certain information they shouldn't see. Organizations need a solution offering sandbox anonymization that allows for safe sharing of data with other people in the company.

- Data agility/data automation—Odaseva includes an extraction tool that allows IT to drop data into a data lake in order to run AI analytics, business-intelligence analyses, server automations, and so on. This extraction tool also can assist organizations in complying with data-privacy mandates such as GDPR and CCPA (the California Consumer Privacy Act of 2018). According to those mandates, organizations must be able to anonymize or erase certain Salesforce records after a specified period of time. Odaseva supports that ability.

Clearly, backup and recovery is only the beginning. As part of a comprehensive solution, organizations must investigate additional capabilities associated with archiving, performance optimization, and data compliance (to name a few).

Odaseva Scalability

Overall, the Odaseva platform enables organizations to address a variety of protection and intelligent data management use cases—providing not only security, but also allowing IT to easily manage extremely large data volumes.

Organizations evaluating backup and recovery solutions for their Salesforce data must also consider scale. The most beneficial solution should be able to demonstrate that it can back up very large, complex environments. The Odaseva API built on top of the Salesforce API enables such scaling.

The Bigger Truth

It is clear that enterprises selecting a backup and recovery solution for Salesforce must consider a number of factors. The solution has to be able to demonstrate that it can back up very large, sophisticated environments. How many hierarchy levels does the solution support? Does it offer automation as objects are added? At scale, maintaining a data protection strategy cannot perpetually remain a manual effort. And what about restore-related flexibility, fidelity, and quality? The ability to compare data across a sandbox environment and a production environment is essential, as is the ability to provide pre- and post-processing for advanced restoration scenarios.

In other words, backup and recovery is just the beginning. Additional capabilities associated with archiving, performance optimization, and data compliance (to name a few) should also be part of the solution you select.

The Salesforce platform is mission-critical, and Salesforce data protection is your responsibility. But do not underestimate the amount of effort it takes to protect this data. Deploying a basic backup tool may look like a great start, but in reality, you'll need fuller capabilities that go well beyond backup and recovery into archiving, compliance, and intelligent data management.

With the Odaseva platform, you get more than just backup and restore. You gain availability, agility, and options to activate additional use cases along the way. Implementing Odaseva is like buying insurance to get you ready for the future.

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