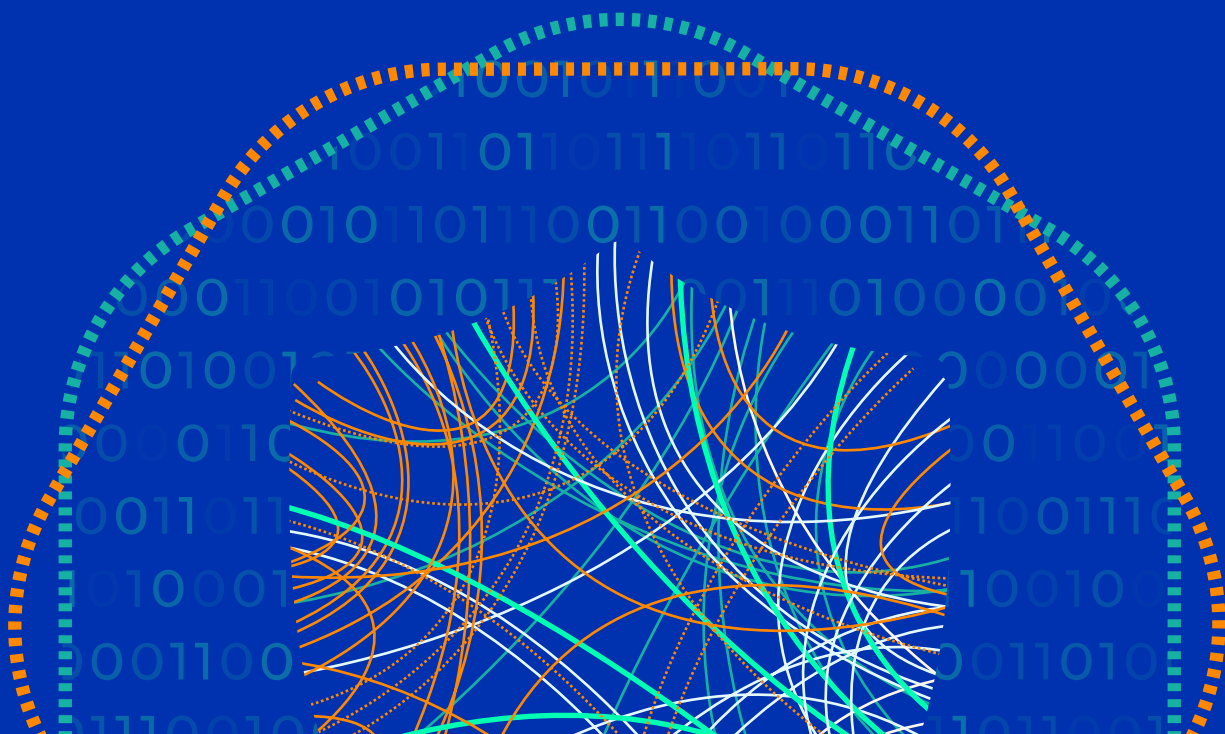


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Seven Myths And Truths About Protecting Your Salesforce Data

There's more to managing your Salesforce data than meets the eye. Make sure you know what you need to know to avoid a painful data loss.



What you think you know can hurt you

The Salesforce platform has grown far beyond its roots as a CRM. It's now a wide-ranging platform that businesses depend on to manage many of the most important things they do. But while Salesforce has changed immensely, many of the assumptions technical and business leaders have about the data flowing through their Salesforce orgs have stayed the same.

The best practices for managing Salesforce data have shifted. Now more than ever, it's important to check your assumptions and make sure you know everything you need to know about managing Salesforce data. So we've assembled this list of the top misconceptions and the truths that anyone who values Salesforce data should know.

01

MYTH

My Salesforce data is in the cloud, so it's always protected.

TRUTH

If you haven't taken deliberate action to back up your Salesforce data, then it's not protected.

Salesforce, like many other SaaS and cloud platforms, embraces a shared responsibility model for data. That means you can count on Salesforce to ensure the security and integrity of the platform, but you are responsible for securing and managing all the data you generate.

For example, if a disk array fails in a backend database, then Salesforce will fix it. But a data loss resulting from a user error, a faulty integration, or a malicious attack on your organization is your problem to solve.



Responsible for
all of your data
IN the cloud:
YOU



Responsible for
the integrity **OF**
the cloud:
SALESFORCE

02

MYTH

Salesforce data only matters for the sales team, so it's not that important.

TRUTH

Salesforce data is essential to the entire operations of many companies.

Gone are the days when Salesforce was just a CRM.

Salesforce is now a leader in countless Forrester Wave reports and Gartner Magic Quadrants from Enterprise Marketing Suites to Multiexperience Development Platforms. Odaseva partners with organizations that rely on Salesforce for mission-critical business functions like always-on call centers, customer communities, and 360° customer management for digital businesses.

And yet, a lot of companies are only now fully embracing the importance of their Salesforce data. The truth is that Salesforce has grown to become a business-critical system of record for complex organizations, with an impact on nearly every business function. Seen from this point of view, Salesforce data becomes much more than the backbone of a SaaS application. It's the lifeblood of entire organizations.

03

MYTH

Fully backing up a Salesforce org is easy to do.

TRUTH

Fully backing up Salesforce data requires a careful orchestration of process and technology.

Three Key Questions to Answer Before You Back Up Your Data



As Salesforce implementations have grown more complex and more deeply intertwined with key business functions, the challenge of backing up data has also gotten more complex.

There is no “select all” command in Salesforce. You can’t punch a few keys and back up your data. Extracting data from Salesforce requires the use of an API, every time. And Salesforce APIs have governor limits. For example, you can only make 15,000 bulk API calls per day—and if you use them all, you can’t move data in or out of Salesforce in bulk without waiting 24 hours.

If you have a lot of Salesforce data to back up because your implementation is particularly large and contains multiple orgs, then it can take a very long time to complete a backup. And if the person charged with backing up the data doesn’t have complete field-level security access, then the data won’t be fully backed up. That person can only back up the data she can see.

These are only just a few of the reasons why backing up Salesforce data is more difficult than it might look, especially if you have a large, complex implementation.

04

MYTH

Weekly data exports are good enough.

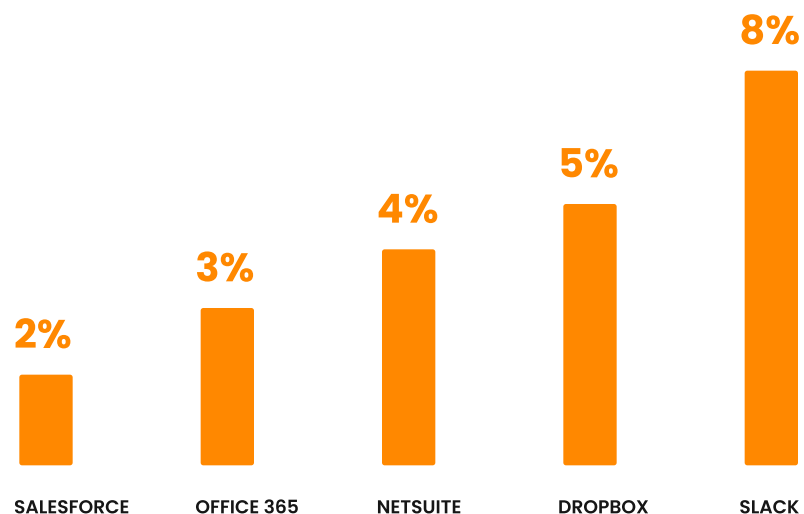
TRUTH

If you back up weekly, your data is still at high risk.

A lot can happen in the period of time between when you back up your data and when you lose it. At Odaseva, we've had customers who have created, updated, or deleted more than 13 million records in a week. If you run a weekly export on Friday, then experience a data loss the following Thursday, you've lost six days' worth of data. A recent study by analyst firm ESG found that just 2% of IT professionals responsible for data protection technology can tolerate losing more than four hours of Salesforce data.

Q: What amount of data loss can your organization tolerate for the SaaS applications it current uses?

A: Four hours or more of lost data



**Real-world SLAs and Availability Requirements, The Enterprise Strategy Group, 2020*

05

MYTH

The only reason to back up Salesforce data is in case of a disaster.

TRUTH

Data losses are an everyday occurrence, and most of them are accidental.

The simple fact is that typical data losses aren't caused by a phishing attack or a rogue employee. Most are just mistakes. And the larger your Salesforce implementation is, the more likely it is that mistakes will happen. Every time every user with Modify All permission logs into your Salesforce org, every API call, every connection point with another application, every interaction with a third party service provider, is an opportunity for someone to make a mistake that corrupts or destroys your Salesforce data.

Common Causes of SaaS Data Loss



Accidental Deletion



Disgruntled Employees



Malicious Attacks



Third-party Apps and Integrations

06

MYTH

As long as my Salesforce data is backed up somewhere, it will be easy to restore.

TRUTH

Restoring data is a detailed process that must be executed correctly.

As Salesforce has grown more deeply integrated into businesses, the relationships between data have become as important as the data itself. Parent-child relationships can be intricate and many-layers deep. To preserve them, data needs to be restored in the right order.

Because Salesforce data must be restored through APIs, the same customizations and automations you've made to enforce rules and execute business processes can work against you. A validation rule created last week to ensure data quality can prevent a record entered last year from successfully restoring. The trigger or flow that sends an email upon record creation will also execute during the restore—both slowing the time to restore and introducing unexpected side effects.

The timing of Salesforce releases can also be a complicating factor. New releases can lead to changes in metadata, which can make a restoration more challenging.

There are just a few of the countless complications you might experience when you restore lost data—and all of them are reasons why having a data recovery plan is so important.

07

MYTH

All Salesforce data backup solutions are basically the same.

TRUTH

Enterprise companies with large, complex Salesforce implementations need solutions that meet much higher requirements.

There are a number of options available to protect your data, but it's crucial to match the level of solution to the level of need.

A solution that works well for a small or mid-sized company is unlikely to meet the needs of a large enterprise. Here are a few key points of difference to think about when you're evaluating your options:

Security

Most backup solutions targeted to smaller businesses can't deliver "no-view" service—that means they can see your data, which can leave you exposed to additional risk of a breach. For organizations with high regulatory requirements or security needs, this can be a major issue.

Performance

Handling Large Data Volumes at speed without triggering Salesforce's Governor limits requires specialized infrastructure and the ability to capture every aspect of your data, which incremental backups can't do. Solutions designed around the needs of smaller businesses may be too limited to handle the amount and granularity of data that enterprise companies need to manage.

Expertise

Simply having the technology is only part of the equation for effective backup and restore. You also need the right process and training for teams, and in many cases, the ability to outsource backup when internal teams aren't available. This requires a level of expertise and support that simpler apps may not be designed to provide.

If you didn't know, now you know.

Interested in learning more about protecting your Salesforce data? Visit odaseva.com/resources for more resources like our Complete Guide to Salesforce Backup and Restore, written by our Founder and CEO Sovan Bin in collaboration with Salesforce.

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