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Salesforce Backup
Best Practices
Guide

Introduction

Data is key to any business today. It fuels decision-making, strengthens customer relationships, and empowers overall operations. As a leading customer relationship management (CRM) platform, businesses increasingly rely on Salesforce to drive growth and productivity. Salesforce has thus become a central hub for managing a company's invaluable data.

This guide explores Salesforce backup and recovery best practices that organizations should be following to make sure their critical data is secure and accessible. We'll dive deep into the whys and hows of Salesforce backup, emphasizing its pivotal role in data loss prevention, security, compliance, and choosing the right backup provider.

Before we talk about backing up your data, let's talk about data itself and what a pivotal role it plays in all organizations.

The Growing Importance of Data in Business

The growing importance of data in business is driven by multiple factors. It has become a crucial asset for organizations in all industries. The following are some of the reasons why businesses rely heavily on data:

Customer insights

Collecting data allows businesses to understand their customer's preferences, behaviors, and needs so that products and services can be tailored and personalized, which in turn will improve customer experience and build brand loyalty. Analyzing customer feedback, reviews, and interactions provides valuable insights into customer sentiment.

Data for marketing

Data-driven marketing enables organizations to effectively reach their audience while boosting conversion rates and revenue. Companies can apply statistical models to attribute sales and conversions to specific marketing channels or touchpoints; this aids in the allocation of resources for maximum impact.

Organizations also utilize customer information to craft tailor-made marketing campaigns. This encompasses creating personalized email communications, suggesting products to customers based on their behavior and preferences, and delivering targeted advertisements.

Enhancing customer support

Effective customer support relies on data to offer personalized experiences and prompt issue resolution. Utilize data analytics to extract actionable insights from customer feedback, to help identify patterns, and to focus on areas for improvement in the support process.

Companies today will continuously update and optimize their knowledge bases using data insights, ensuring that support agents have access to the most accurate and relevant information.

Streamlining operations

Optimizing data improves overall operational efficiency from start to finish. Businesses leverage customer data to streamline supply chain processes, guaranteeing prompt production, effective distribution, and shorter lead times. Additionally, they apply data-driven demand forecasting models.

Strategic decision making

Decision-makers rely on data for well-informed choices, whether it involves entering new markets or developing products. Utilizing natural language processing allows them to analyze customer sentiments in reviews and feedback, evaluate overall satisfaction, and identify areas for improvement. Business intelligence tools have the capability to analyze and visualize large data sets, extracting actionable insights that contribute to strategic planning.

Salesforce as a Central Hub for Critical Data

At the core of vital data management is Salesforce, the leading player in the CRM market. Salesforce helps facilitate business data centralization with its comprehensive suite of tools for customer data management, marketing campaign monitoring, sales opportunity tracking, and more. The ensuing sections delve into the pivotal role of Salesforce as the linchpin of your data strategy.

Single source of truth

Salesforce establishes a singular source of truth for customer data, guaranteeing consistency and accuracy. It serves as a centralized hub for critical data, and provides a unified platform for storing, managing, and analyzing key information related to customers, sales, and operations. Additionally, the automation capabilities of Salesforce streamline workflows, ensuring data accuracy and efficiency across various business processes. Salesforce functions as a central repository, empowering organizations to harness the power of their data for strategic insights and improved business outcomes.

360-degree view

Salesforce provides a comprehensive perspective on your customers, their interactions, and their history with your organization. By centralizing customer data, including interactions, transactions, and preferences, Salesforce delivers a unified view of each customer.

Users can generate personalized dashboards and reports, combining data from various Salesforce objects to gain insights into various aspects of the business in a singular view.

Automated process

Salesforce streamlines processes through the utilization of their Flows and Apex triggers. Salesforce Flow facilitates complex workflow design using a graphical interface, better known as no-code/low-code automation in the Salesforce ecosystem. Apex triggers provide advanced automation through coding. When employed together, these tools automate tasks such as field updates and record creation, ensuring precise management of critical data throughout the customer lifecycle within the Salesforce platform.

Salesforce data loss is more common than you think

76%
of companies are not completely confident they could restore Salesforce data after a bad import

89%
of IT Professionals have not reached their Salesforce data retention mandates

81%
of IT Professionals are concerned about human error-related Salesforce data loss

The Significance of Backing Up Salesforce

Considering Salesforce's pivotal role in managing organizations' critical data, ensuring the protection of this information is paramount. The subsequent points highlight key factors that emphasize the significance of Salesforce backup.

Unintentional data deletion

Crucial records can be inadvertently deleted by system users, leading to the erasure of vital information from the system. In instances of unintentional record removal, maintaining regular backups ensures quick recovery and prevents data loss.

Data integrity and recovery

Data corruption can occur due to multiple factors, like system errors and network issues. Whether it's a result of human errors, integration errors, or unforeseen circumstances, maintaining reliable backups ensures that businesses can quickly recover and maintain data integrity. This proactive approach not only safeguards data against potential corruption but also supports data consistency, compliance, and overall business resilience within the Salesforce environment.

Cybersecurity threats

Malicious actors may attempt to compromise your data's confidentiality or integrity through tactics such as ransomware, phishing, or other cyberattacks. Ransomware, for instance, has the potential to access and delete your data, demanding a ransom for data restoration. Attackers may also exploit vulnerabilities to compromise user credentials, posing risks of data breaches or unauthorized data access.

Compliance requirements

Numerous businesses function within industries that have distinct requirements concerning data retention and compliance, such as Healthcare and Financial Services. Failure to comply with these regulations can lead to legal complications and regulatory penalties. Two notable examples include HIPAA and GDPR.

Health Insurance Portability and Accountability Act (HIPAA)

In the healthcare sector, organizations are obligated to adhere to stringent data retention and protection regulations, and failing to do so could potentially end with hefty fines and legal action. Encryption mechanisms play a crucial role in safeguarding Protected Health Information (PHI) during transition and storage.

General Data Protection Regulation (GDPR)

Companies engaging with European customers must meet specific data privacy and consent requirements to avoid harm to their brand reputation and penalties. Adherence to these GDPR requirements ensures responsible and transparent handling of personal data within the Salesforce platform, safeguarding individuals' privacy rights in line with European data protection regulations.

Data security and availability:

GDPR requires organizations to implement appropriate technical and organizational measures to ensure the security of personal data. Regular data backups are a crucial aspect of securing data and ensuring its availability in the event of data loss or a security incident.

Data breach response:

In the event of a data breach, GDPR requires organizations to have processes in place to detect, report, and investigate the breach promptly. Having up-to-date and accessible backups can aid in the recovery process and minimize the impact of a breach.

Data minimization and retention:

GDPR encourages data minimization and imposes restrictions on the retention of personal data. Organizations should consider these principles when implementing data backup strategies, ensuring that only necessary and relevant data is backed up and retained for appropriate periods.

Business continuity:

Data backup is essential for business continuity and can help organizations resume operations quickly after a disruptive event, such as a cyberattack or accidental data loss.
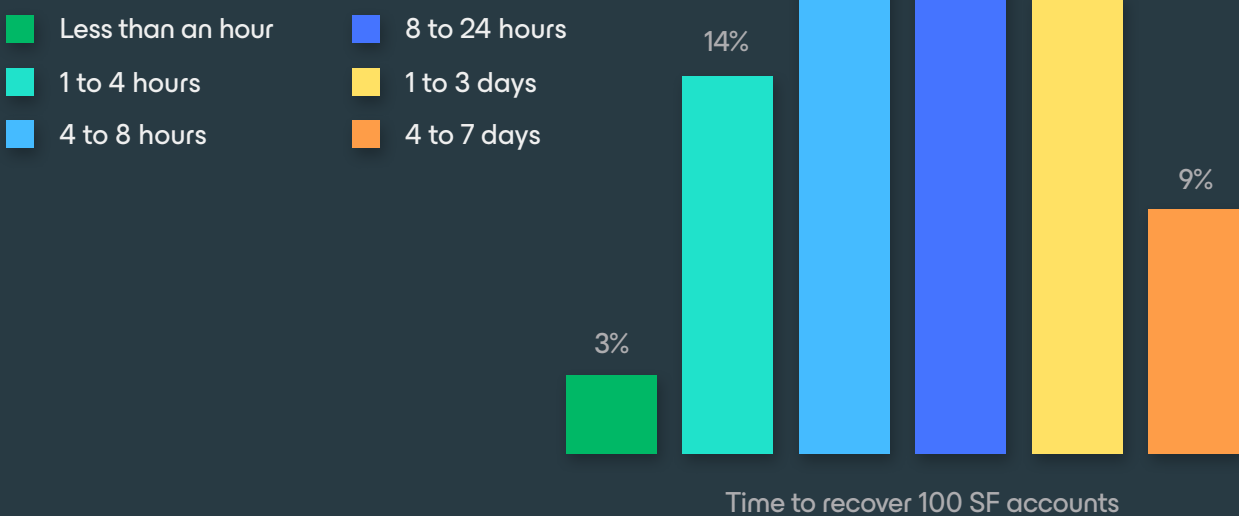
What is the time it would take to recover 100 Salesforce account records?

Level of recovery confidence after a bad import or corruption

When asked if **100 accounts** and their related records were lost, approximately, how long would it take you/your organization to restore your Salesforce data, including metadata and its dependencies? Here are the results

Legend:
- 🟩 Less than an hour
- 🟦 1 to 4 hours
- 🟦 4 to 8 hours
- 🟦 8 to 24 hours
- 🟨 1 to 3 days
- 🟧 4 to 7 days

Bar chart — Time to recover 100 SF accounts:
- Less than an hour: 3%
- 1 to 4 hours: 14%
- 4 to 8 hours: 26%
- 8 to 24 hours: 26%
- 1 to 3 days: 17%
- 4 to 7 days: 9%

*Data from our Salesforce Protection Trends Report

Best Practices for Salesforce Backup

To address the multifaceted challenges presented by data loss, security threats, compliance requirements, business continuity, and data migration, it's essential to implement a robust Salesforce backup strategy.

Choosing your backup storage

It is crucial to have flexibility in choosing the storage location for your Salesforce backup. Cloud-based solutions offer scalability and improved accessibility. They can be cost-effective and reputable providers such as AWS, Azure, or Google Cloud offer robust storage options.

Businesses may have stringent data residency and compliance requirements, necessitating on-premises storage. Regularly assessing and validating your chosen backup storage solution is vital to ensure data integrity and accessibility during recovery scenarios, which contributes to a robust Salesforce backup strategy.

Ensure data resilience with separated backups

Maintaining a clear separation between your backup and primary Salesforce environment is essential for robust data resilience and effective disaster recovery. In the event of a catastrophic failure, such as a Salesforce outage or a cyberattack, the isolation of your backup from Salesforce guarantees that your data remains unaffected and accessible. This practice not only enhances overall data reliability, but also aids in compliance with regulatory requirements and supports effective disaster recovery strategies.

Consider off-site storage to achieve this separation and to safeguard your critical information. Utilize dedicated backup solutions or storage systems to maintain the integrity and accessibility of your data even if issues arise within the Salesforce platform.

Don't depend on the recycle bin as a backup

The Salesforce Recycle Bin is a temporary storage area that holds records and data that have been deleted by users. While it can be a useful feature for recovering accidentally deleted items, it is not designed as a long-term data protection or backup solution. The Recycle Bin retains deleted records for a limited period (15 days by default). After this period, the data is permanently deleted and cannot be recovered. The Recycle Bin also has storage limits, and once those limits are reached, older items are automatically purged, even before the 15-day retention period.

Insist on granular restore and recovery

Not all data loss scenarios require a full system restore. Granular restore and recovery capabilities allow you to extract specific records or data elements. Make sure to utilize backup solutions or features that provide granularity, allowing you to recover precisely what is needed in case of data loss or corruption. This approach enhances efficiency, reduces downtime, and minimizes the impact of potential data issues by targeting and restoring only essential components which, in turn, ensures a more agile and responsive recovery process.

Beyond Salesforce data, prioritize the backup of metadata. Metadata encompasses your organization's configuration, custom objects, fields, workflows, and more. Overlooking metadata backup can impede the restoration of your Salesforce instance to its previous working state. Metadata backups are also essential for maintaining the integrity of your system's configuration, data relationships, and compliance settings. This ensures that your Salesforce environment can be fully and accurately restored in the event of data loss or system issues aiding in the continuity of business operations and data integrity.

Implementing a comprehensive backup strategy

Your primary defense against data loss is the implementation of a comprehensive backup plan, comprised of key elements such as data retention, security, and disaster recovery planning.

A well-thought-out backup strategy equips you to deal with data loss events effectively. Develop a regular backup schedule that corresponds with the frequency of data updates and your business requirements including

incremental backups and verify the recovery procedure frequently to ensure data integrity. Document and communicate the backup strategy across your organization, ensuring that all the stakeholders are aware of the procedures in place for data protection and recovery.

Choosing a backup solution

When deciding on a third-party backup solution for Salesforce, several factors merit consideration to ensure optimal data protection and recovery capabilities. Begin by evaluating the features and functionalities offered by different providers. Look for comprehensive backup options that cover both data and metadata, providing a holistic solution for Salesforce backup needs. Consider the scalability of the backup solution to accommodate yourorganization's growth and evolving data requirements. Also, flexibility in terms of storage options is crucial, so choose a solution that aligns with your data residency and compliance preferences, whether it's cloud-based storage or an on-premises solution.

Establish data retention guidelines

Guidelines for data retention play a pivotal role in determining the duration for which backups are retained, with considerations such as data criticality, regulatory stipulations, and business requirements shaping these policies. It is imperative for companies to regularly assess and revise these policies to ensure ongoing compliance and alignment with evolving business objectives. Defining specific data retention periods mitigates the risk of retaining excessive data, which could result in unnecessary costs, or insufficient data, which may lead to compliance issues. This proactive approach ensures a balance that aligns with organizational needs and regulatory expectations.

Ensure backup reliability through testing

Testing your backups on a regular basis is crucial for ensuring their reliability. Periodic data recovery tests ensure that your backup data can be successfully restored, validating its integrity and usability for business operations. A comprehensive backup strategy is not complete without testing and validation. This proactive approach helps identify any issues in the backup and restore procedures before they become critical during an actual data loss event. By regularly testing backups, you enhance confidence in your data recovery capabilities and ensure that your Salesforce backup strategy is reliable and effective.

Training your team

Ensure that your team is proficient in utilizing backup tools, executing recovery tasks, and following data recovery best practices. A well-trained team is better equipped to safeguard critical data, and providing training sessions on the initiation, monitoring, and testing of backups, will help in the event data restoration is needed. This knowledge empowers your team to respond effectively in the event of data loss, enhancing the overall reliability and success of your Salesforce backup strategy.

Document backup protocols

Documenting backup and recovery procedures is essential to the process, which includes well-maintained documentation that proves invaluable in both recovery drills and real data loss scenarios, ensuring that recovery is swift and accurate. Comprehensive documentation is key to enabling your team to adhere to standardized and effective procedures in the event of data loss. It is important to clearly outline the steps involved in data and metadata backups, including schedules, automation settings, and any specific configurations.

This documentation guarantees consistent backup processes and serves as a guide for the IT team. Include details on how to test and verify backups, as well as procedures for data restoration. Regularly update this documentation to reflect any changes in your Salesforce environment or backup strategy.

What to Look for When Choosing a Third-Party Salesforce Backup Solution

Multiple Salesforce third party partners have developed comprehensive backup solutions that remove the manual component, supply automate backups, and significantly decrease restore time. These solutions can be found on the Salesforce AppExchange. Here is an outline of what to look for when evaluating the best solution for your organization:

• Determine the optimal frequency for automated backups tailored to your organization's needs and select a solution that empowers you to set and manage backup schedules to accommodate those needs.

• Ensure you can start with a full backup of Salesforce data and metadata. Going forward, customize backup frequencies based on file importance, allowing critical files to be backed up every 30 minutes and others on a daily basis.

• Veeam is proud to be the global leader in data protection by offering unparalleled backup solutions that cater to all your organization's data needs, including Salesforce.

• Choose a solution with a straightforward interface to simplify Salesforce data backup for your team. Opt for ease of use and uncomplicated installation to streamline the backup process.

• Select a solution that effortlessly scales with your business growth. As your Salesforce data expands, ensure the chosen solution accommodates your company's evolving needs without incurring additional costs.

• Seek a solution that recovers Salesforce data, metadata (a crucial component) records, hierarchies, fields, and files.

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Veeam Backup *for Salesforce* empowers you with complete control over your Salesforce data through automated backups, granular recovery, robust security and compliance features, a user-friendly interface, and a seamless installation process.

Conclusion

Salesforce stands as an invaluable platform for businesses to efficiently manage and harness their critical data. The importance of Salesforce backup cannot be overstated, given the ever-present risks of data loss, security threats, compliance requirements, business continuity, and the need for seamless data migration.

In the ever-evolving landscape of a data-driven world, proactive data protection emerges as a fundamental pillar for business resilience, growth, and long-term success. By implementing a comprehensive Salesforce backup strategy, adhering to practices outlined above, and selecting a robust third-party solution, your business not only safeguards against existing threats but also positions itself to leverage data-driven opportunities in the future.

Try a FREE 30-day trial of
Veeam Backup *for Salesforce*