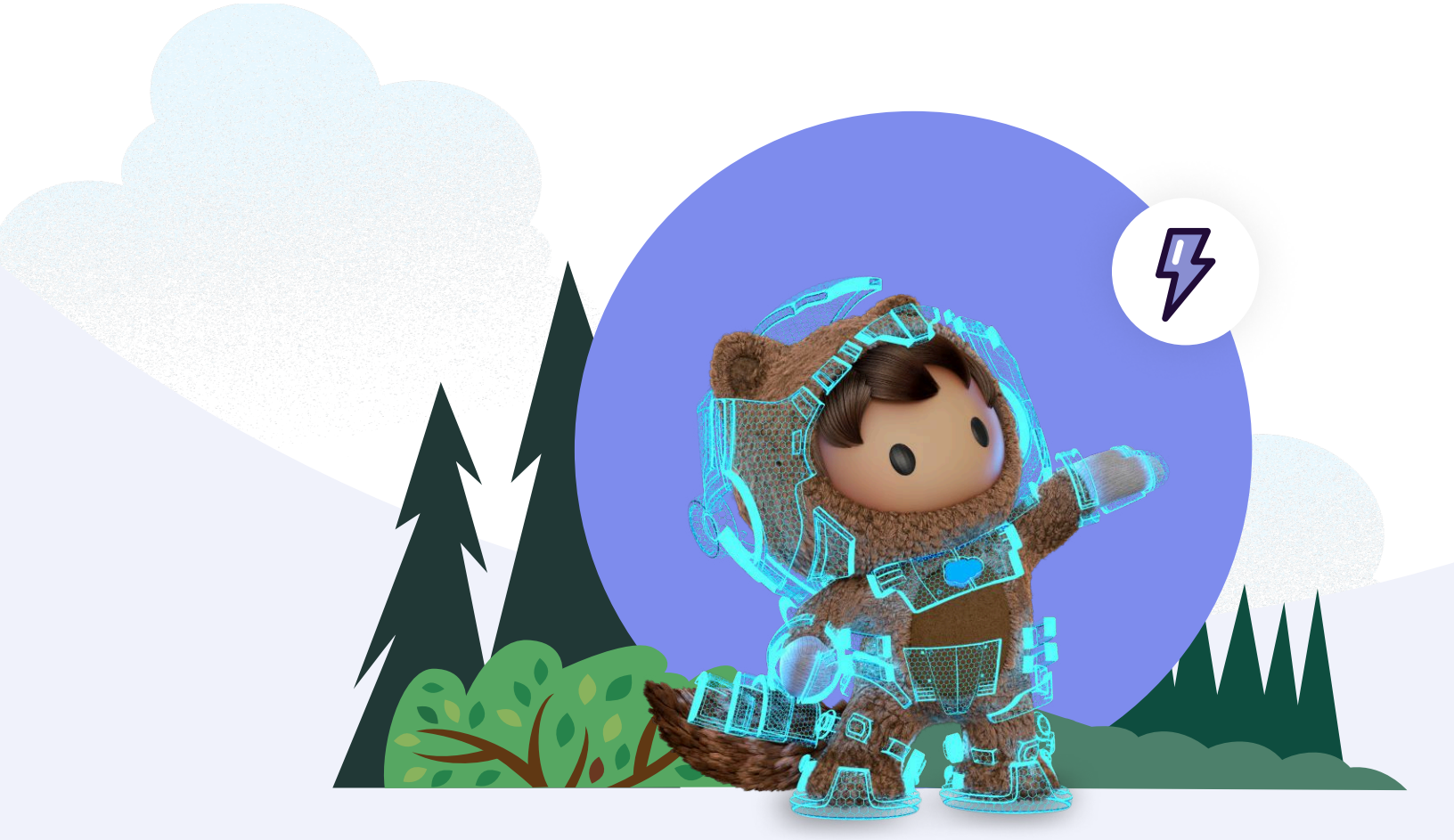
CRM Resilience Guide: How to Minimize Data Risks at Scale



Your Salesforce org is growing, but is it scaling?

If it seems like you're handling more users, tickets, reports, and integrations than ever, you're not alone. Globally, organizations are generating more data than ever. If you're responsible for your company's Salesforce org, that data – and everything that comes with it – falls squarely in your lap.

With escalating data volume, velocity, complexity, and vulnerability, Salesforce Admins face the growing challenge of minimizing risk and maintaining a performant org. To ensure that your Salesforce org scales as your business does, how can you manage data through its lifecycle and ensure it's resilient in the event of loss or corruption?

This guide discusses how to minimize risks to your data as you scale, with a focus on backup and recovery.

Let's dive in.

The (less) obvious risks of growing data volumes

Certain implications of a growing org are hard to ignore. For example, we'll notify you when you're about to exceed your storage allocation and need to pay for more. Before that even happens, though, your users will probably notice that certain actions take longer than usual to load. These are not-so-subtle hints that your org might be growing faster than you can manage.

However, there are other implications of a growing org that aren't so obvious – but potentially more impactful.

#1 Complexity

As the amount of data in your org grows, it doesn't simply become a bigger pile of the same information. The data itself becomes more interconnected. For example, imagine a simple customer record you store in Salesforce. As your org grows, that record might become linked to multiple sales opportunities, support tickets, etc. So, any error associated with that record can have cascading effects.

Another way growing data volumes add complexity is through integrations. Most Salesforce orgs integrate with external systems like marketing automation or accounting software. As data volume grows, ensuring data consistency and preventing errors during synchronization across platforms becomes a more significant challenge.

#2 Vulnerability.
A larger dataset increases the likelihood of human error, which is the leading cause of data loss. More records and files make it easier to delete or overwrite something by mistake. And if a mistake does happen, it can take longer to identify since there's so much data to sift through.

There's also the issue of users. If your organization and your data are growing, so is the number of people using Salesforce. Permissions that allow everyone to access everything, can lead to more mistakes and make you more susceptible to system abuse from disgruntled employees.

While less likely, cyberattacks are also a real threat. Hackers invariably follow valuable data, and SaaS-conscious attacks are rising.

This increased vulnerability, coupled with the complexity of that data, increases the chances of experiencing data loss or corruption.

So what's the solution?

How to minimize data risks as you scale

Despite all the challenges associated with more data, it's unrealistic for your Salesforce instance to stop growing – nor would you want it to. That's why you need a strategy to ensure resilience and manage the risk of data loss as your instance grows.

When it comes to protecting your Salesforce data, understanding the shared responsibility model is key: while Salesforce secures the platform, your organization is responsible for the security within it. This means you are responsible for recovering data after loss or corruption, configuring user access, and ensuring data integrity. Without a proper solution in place to manage these aspects, you risk your ability to sell and serve customers.

The steps below are a great place to start:

- **Define your recovery goals:** Decide how much downtime your business can handle before it faces detrimental impacts (recovery time objective) and how much data you can lose (recovery point objective).

- **Inventory your data**: Create a complete list of all data objects (e.g., Accounts, Contacts, Opportunities) stored in your Salesforce org. Include any custom objects and fields you've created.

- **Archive data to reduce your risk:** As data becomes less relevant yet still needs to be retained for compliance, it should be moved outside of production to reduce your risk exposure in the event of data loss and corruption.

- **Have a data recovery plan in place:** Even with taking the measures above, data loss can still happen. Be sure to back up everything important to your org, including data, metadata, files, attachments, etc., and have the tools to restore data into production quickly and easily.

- **Train your team and stakeholders:** As a Salesforce Admin, you should feel empowered to educate your users on best practices for keeping data safe in Salesforce and keeping key stakeholders aware of the business continuity plan for Salesforce.

- **Continuously improve and adapt:** Regularly review, test, and update the business continuity plan and stay current on data protection best practices within Salesforce.

Ready to unlock scalable Salesforce growth?

Explore Salesforce Backup & Recover solutions to learn more.