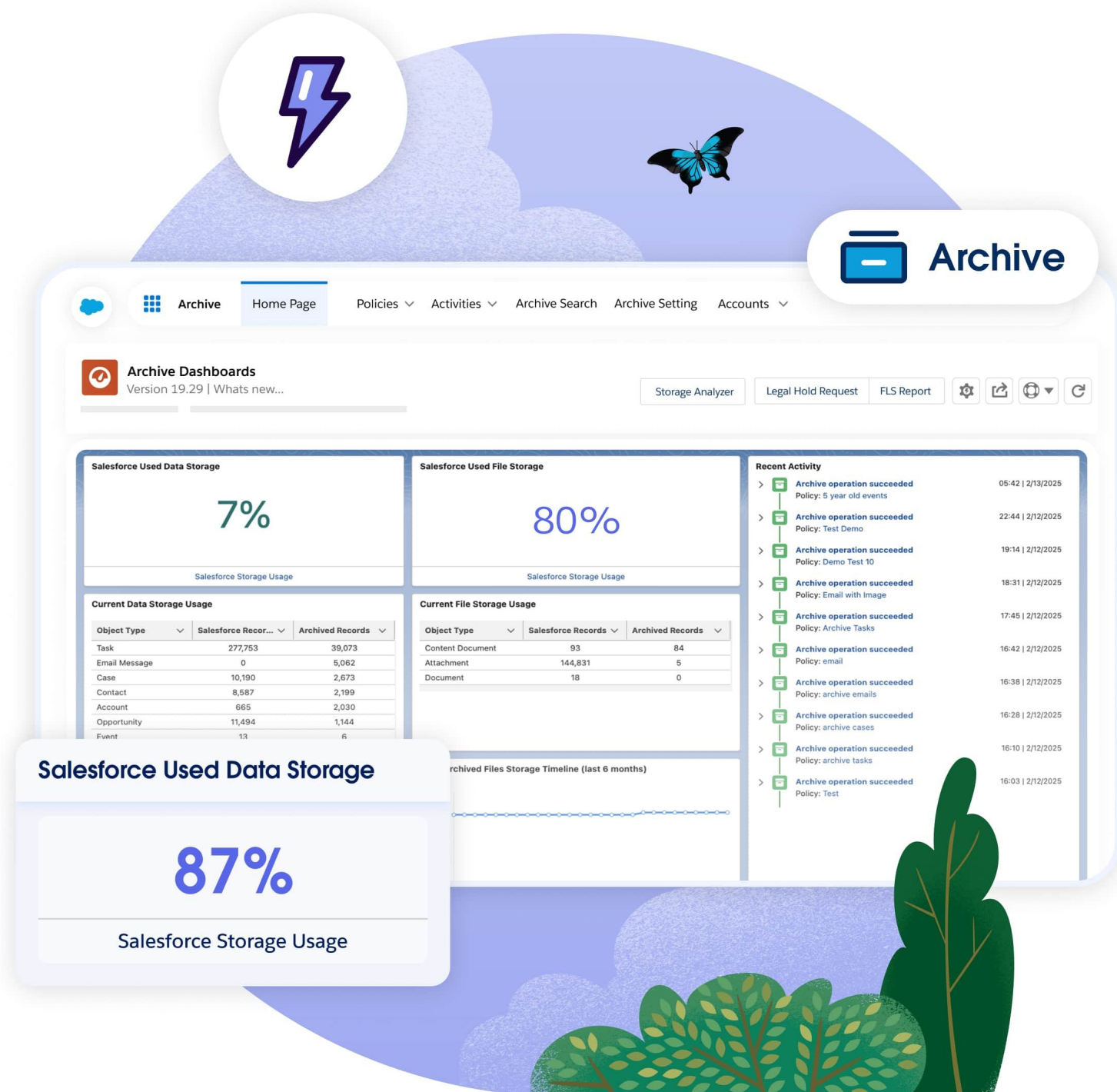




Salesforce Data Archiving: A Playbook for Success



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Introduction

In 2025, the world is expected to generate [182 zettabytes of data](#). Broken down further, organizations manage at least a [petabyte of data](#), with many reaching 500 petabytes or more. To help put that into perspective, a single petabyte is equivalent to about 200,000 full-length movies or around 500 billion pages of text.

Within Salesforce, Admins often find themselves managing increasingly vast amounts of data within their organizations. This data growth can become overwhelming, making it difficult to know where to begin when it comes to optimization and efficiency. The sheer volume can lead to challenges in identifying critical information, maintaining peak performance, and ensuring a streamlined user experience. Many Admins grapple with the question of how to effectively manage this expanding data landscape and feel unsure about the best first steps to take.

Name	Factor	Value in Bytes
Kilobyte	10 ³	1,000
Megabyte	10 ⁶	1,000,000
Gigabyte	10 ⁹	1,000,000,000
Terabyte	10 ¹²	1,000,000,000,000
Petabyte	10 ¹⁵	1,000,000,000,000,000
Exabyte	10 ¹⁸	1,000,000,000,000,000,000
Zettabyte	10 ²¹	1,000,000,000,000,000,000,000
Yottabyte	10 ²⁴	1,000,000,000,000,000,000,000,000

That’s where archiving comes in. Archiving data has several benefits, including improving governance, boosting system performance, and navigating compliance. But with so much data, how do you know where to start?

In this guide, we’ll walk through how you can plan and execute a data archiving strategy that fits your organization’s unique needs.

What you'll learn in this guide:

- Why data archiving is essential
- Steps to creating an effective data archiving strategy
- How to get started with Salesforce Archive



What Is Data Archiving, and Why Does It Matter?

Data archiving consists of safely and securely moving inactive data from a live environment to a storage location where it can be recovered and returned to the live environment if needed. Generally, traditional archives are "cold" or static storage, meaning data can't be easily accessed except by going directly to where it's stored (a key differentiator of Salesforce Archive is that it offers "warm" storage, which is more easily accessible from production and can be queried).

Of all the phases of data life-cycle management, archiving is often the most overlooked. Many organizations prioritize managing and protecting readily accessible, actively used data. Because archiving deals with less frequently accessed data it can be seen as a less urgent concern. But not when you consider the risks of unmanaged data growth.

The risks of not having a data archiving solution include:



Poor data governance: Disorganized or cluttered data can lead to inefficiencies if employees have to spend time searching for records and make decisions based on incomplete or outdated information.



Performance degradation: As data volumes grow, system performance can suffer. Accessing and processing information from bloated databases can slow operations, reduce efficiency, and result in a poor user experience.



Compliance pressures: Regulations like the General Data Privacy Regulation (GDPR), Health Insurance Portability and Accountability Act (HIPAA), and others require companies to retain specific data types for defined periods. The challenge is managing vast amounts of data while ensuring compliance. Balancing both can be difficult, but it's crucial for avoiding penalties and maintaining trust with customers and regulators.

Ask yourself: Are these risks you or your organization are willing to take? If the answer is no, keep reading.



Getting Started With Archiving: Steps to Success

Important questions to consider before creating your data archiving strategy:

- **Who** are the key stakeholders that will be involved in this project? This should include decision-makers from both the business and technical side of the house.
- **Who** might need access to the data once it's archived? What level of access will they need and in what scenarios?
- **What** are your primary objectives in archiving data?

Step 1

Inventory your data

To create a successful archiving plan, you need to understand not only the volume of data you have but what types of data sit in your production org. Consider things like:

- **The age of your data:** With so much data, it's easy to mix old or obsolete data with its fresh, relevant counterparts. Having a timeline around when data was entered and its usage will help you understand how legacy should be handled, and if it's meant to remain in live production or not.
- **Your future data needs:** While growth is a natural part of data progression, it needs to be accounted for. After all, the data you're working with now could look completely different from data you encounter in weeks or months. Charting your data's growth will help you eliminate any unforeseen surprises that come with data additions.

Step 2

Gain buy-in from the business

You've done your homework to understand what data is in your system and could be archived. Now, it's time to build the business case to gain approval quickly.

To gain buy-in for a data archiving solution, frame it as a solution to critical business challenges. You can highlight how archiving improves Salesforce performance leading to increased team productivity, and mitigates the risks associated with retaining excessive and potentially sensitive data, thus bolstering compliance efforts and avoiding potential fines and reputational damage.

Emphasize that a well-defined archiving strategy is not just about data cleanup, but a proactive measure that contributes to a more efficient and secure Salesforce environment.



Step 3**Determine applicable regulations**

A common question around archiving is why take the time to relocate data when you can just delete it? The answer is compliance. A key aspect to your archiving strategy will be to understand what data retention regulations are applicable to your business, and from there, you can navigate compliance by specifying retention periods in policies as needed.

Examples of such regulations include:

- General Data Protection Regulation (GDPR)
- Health Insurance Portability and Accountability Act (HIPAA)
- California Consumer Privacy Act (CCPA) and California Privacy Rights Act (CPRA)
- Electronic Storage of Broker-Dealer Records (SEC 17a-4)

Once you have identified the relevant regulations, you can align these to the data types you have within Salesforce. This will help you schedule reviews and deletions for each type of record.

Step 4**Select the right tool and create archiving policies**

Evaluate different archiving solutions based on features such as automated archiving, ease of retrieval, scalability, and budget.

Once you have your solution, you can start creating your archiving policies. An archiving policy sets out the principles and requirements for archiving data and its retention period. The retention period defines how long the archived records should remain before being purged, or permanently deleted.

Step 5**Train your users**

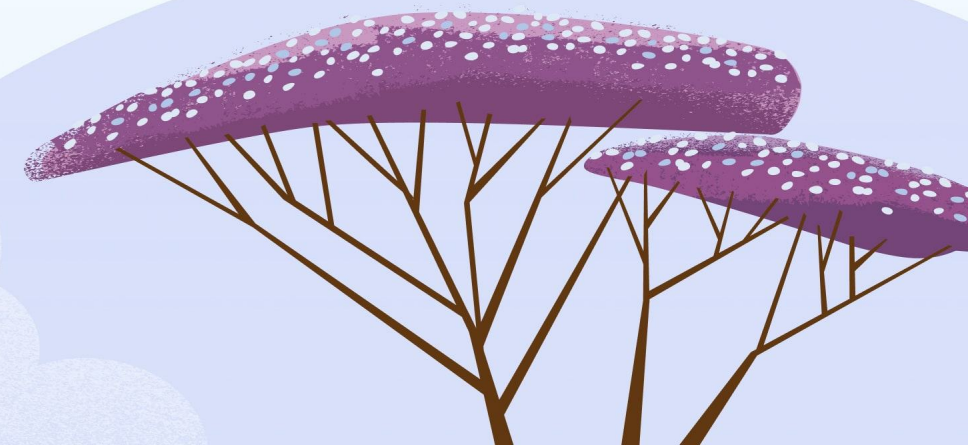
Now that you have the fundamentals of your policy, this knowledge must be shared with and adopted by the wider business. It's also crucial that your end users (with the appropriate permissions) are able to view or even restore archived data from production.

The easiest way to achieve internal awareness and adoption is by creating a clear, comprehensive, and actionable document providing an overview of guidelines. That can include things like:

- Real-time storage monitoring (i.e, through a dashboard)
- Automated and scheduled record deletion and restoration capabilities
- Search functionality

Step 6**Be proactive**

Data archiving is not a static process. Regularly assess the effectiveness of your archiving strategy in terms of storage reduction and user needs. You should also track archived data volume and identify opportunities for further optimization.



Streamline The Archiving Process With Salesforce Archive

[Archive](#) is an automated data archiving solution that allows you to easily relocate inactive or obsolete data from your production org. Archive also allows you to easily define custom archiving policies that include what specific data to store, how often to archive data, and how long to retain the data, which is paramount for regulatory compliance, improving system performance, and minimizing risk exposure.

How it works

The Storage Analyzer feature in Archive analyzes the data in your org and displays the top five objects occupying the most space. After selecting the object you'd like to archive, you'll be guided through how to define the criteria for archiving.

1



After defining the criteria for archiving, you'll see a visual representation of how your Salesforce storage will be reduced.

2

Modify the policy criteria until you're satisfied with the results, and quickly reach your goal of improving performance.

3



To complete the archiving policy, schedule how often you'd like the policy to run and define how long the data should be retained in the archive.

Archive also provides several out-of-the box policies with common objects that you can activate, edit, clone, or use as an example.



How Customers Use Archive



Dobias van Buuren
Chief Technology Architect,
Oranje Furniture Care

“We leveraged the archive solution after identifying the duplicates, we just updated the universal records, and let Archive do the rest.”



Martijn van Kelegom
Salesforce Digital Consultant,
Tony's Choclonely

“Data resilience and lifecycle management strategies are key to peace of mind. Archive ensures we can always find and retrieve our Salesforce data, providing invaluable protection.”

Learn more about **Archive**

Visit our Archive webpage today. Contact us to learn more: 1-800-667-6389

[Learn More](#)



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