

The **business case** for Salesforce backup

Insure your Salesforce investment
and **maximize ROI**

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Introduction

Salesforce is integral to core business processes and has proven value beyond its functions as a CRM, with 98% of teams now reporting that [Salesforce is critical to their business objectives](#). While the ROI of Salesforce increases as it extends to support a wider range of operations, this also leaves more of your business vulnerable to the impacts of Salesforce data loss.

The myth that Salesforce doesn't need backing up because it's cloud-based [has been debunked](#), and the vast majority of Salesforce teams now realize the need to protect their business-critical Salesforce orgs. While the risks and costs of Salesforce data loss compel teams to implement a backup solution, this is only half of the story.

Beyond safeguarding against a worst-case scenario, a backup solution provides wider business benefits: increased efficiency of development work, ease of compliance auditing, and agility, to name just a few. Leveraging these benefits will unlock the full value of your backup solution, and a larger ROI from Salesforce.

The business impact of unprotected Salesforce data

Over the past ten years, the Salesforce ecosystem has, unfortunately, faced the reality of data loss and become well-versed in the need to protect business-critical data.

It's also worth noting that the Salesforce platform comes with the additional risk of lost metadata. As metadata shapes your org's configuration, losing metadata can make your Salesforce orgs unusable until they're restored from either a backup or a manual rebuild.

The risk of Salesforce data loss

While Salesforce is cloud-based, ultimately all of your Salesforce data is stored on hardware and governed by development work undertaken on the Salesforce platform. This leaves Salesforce vulnerable to various forms of data loss:

An error on the Salesforce platform

In 2019, Salesforce accidentally released an error that disrupted past and present users of Pardot, a marketing automation tool. The error corrupted permission models, granting all users permission to view and modify all data.

Worse, the error went unnoticed by Salesforce for nine hours before they pulled all modified instances offline. This was done in order to delete all of the modified permission sets, but it took two days for Salesforce to restore.

Any businesses without a Salesforce backup solution had to rebuild their lost permissions manually, wasting labor hours and stalling end users.

A hardware outage

Salesforce's North America Instance 14 was affected by a power failure in Salesforce's Washington data center. Though Salesforce tried to rectify this by moving the NA14 instance to a secondary data center in Chicago, this created inconsistencies between the backups saved on the two different instances.

Any data backed up using Salesforce native tools between the first and second outage was lost.

Oversights during development work

It's surprisingly easy for your in-house development work to cause unintended data loss. For example, if you convert a custom field from one type to another, you will likely lose all of the data in this custom field. This has knock-on effects, as any list view based on the custom field will also disappear.

Salesforce safeguards against this by preventing data type changes to any custom field that's mapped for lead conversion. However, this leaves any custom fields that aren't mapped still vulnerable to data loss.

Ultimately, Salesforce data loss isn't always catastrophic. [The majority of teams \(67%\) experienced at least one data or metadata loss last year.](#) Many of these will have been small-scale and hardly headline-worthy, but still potentially disruptive to daily operations. As a result, teams need to search for a backup solution to cover data loss of all sizes and forms.

The state of Salesforce backup

The majority of Salesforce teams clearly understand the risk of data loss and the necessity of a backup solution, [with 86% of Salesforce teams now employing some form of backup.](#) However, many are not using a tool that enables a swift and effective backup or restore process, leaving them vulnerable to the risk of a limited recovery and additional costs.

Most backup tools are lacking in three key areas:

1. Data and metadata capabilities

A good backup tool should protect both your data and metadata, but many fail to offer the latter. If metadata isn't backed up, you're at risk of losing your configurations and the data it holds.

2. Format of your backup

Some backup tools will export your data as a comma separated value (.csv) file. This reduces all your Salesforce data to a list in plain text format, which doesn't capture the complex relationships between records. When you come to restore your data, you'll have to manually input all of this data and its relationships.

3. Efficiency

Backup tools must be efficient, in order to minimize both the amount of data lost and the value forfeited by down-time. The efficiency of a backup tool can be estimated by weighing up the time it takes you to

- a.** Spot a data loss incident: Without a tool that helps you spot data loss as soon as it occurs, you'll likely be reliant on an end user reporting it — an unreliable and inefficient process.
- b.** Recover your data: Some services have lengthy wait times before you'll even have access to recovered data.
- c.** Restore your data and metadata: The length of this process is usually mitigated by a [disaster recovery plan](#), which sets out the steps and timeline for restoring any losses to your Salesforce instance

Unfortunately, native Salesforce tools fall short in these areas. A recent Gartner® report concluded:

“There are safeguards incorporated into Salesforce to provide a degree of recoverability... the extent of this capability is either limited or considered a last-resort feature.”

Gartner, Streamline and Simplify Salesforce Backup and Recovery, *Bill Michael Hoeck*, November 19 2019

Teams must be mindful of both the risk of data loss from the Salesforce platform, and the jeopardy of an ineffective restore process.

For a complete guide to these risks and evaluating an appropriate backup solution, download our free ebook [Backups for Salesforce](#).

The costs of Salesforce data loss

Despite the increased adoption of Salesforce backup solutions, the cost of data loss is rising. The most recent [study from the Ponemon Institute](#) showed that the cost of a single data center outage for a single business was as high as \$2.4 million dollars in 2016 — a 34% increase from the maximum cost of data loss in 2013. This sum arises from the downtime of critical business functions, alongside the additional costs of fines for breaching external compliance standards and the less quantifiable impact on your business' reputation and trust from your customers and prospects, who may decide to take their business elsewhere.

Direct costs

These are the unavoidable out-of-pocket costs following a data loss incident, such as compliance fines or payment for Salesforce's Data Recovery Service.

Indirect costs

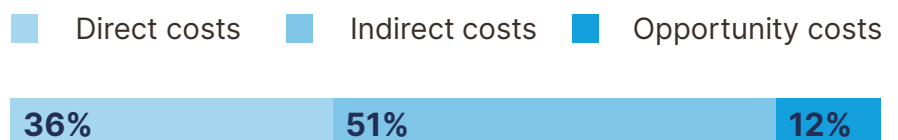
This is the amount of time, effort and other organizational resources spent to recover from a data loss incident. While data loss will not prompt you to pay for any of this immediately out of pocket, the data loss incident is eating into resources that should have been directed elsewhere, such as a developer's time working on a new feature that will ultimately bring in revenue to the business.

Opportunity costs

The cost of lost business opportunities, customer churn, and damage to your reputation after the outage — this is difficult to quantify.

Breakdown of the costs associated with unplanned data loss

The same Ponemon study analyzed data from previous data loss incidents to provide the average proportions of data loss.



The impact on various roles across the business

As various roles are reliant on your Salesforce instance, there will be knock-on effects across your business.

End-users

Impact: Your end users in marketing and sales depend on Salesforce, so any downtime loses you leads and conversions.

Cost: Consider how long it would take to recover your Salesforce data and metadata. Then, calculate the cost of lost leads and conversions that you would have generated and closed during this period.

Admins and developers

Impact: Your admins and developers spend hours configuring your Salesforce orgs to support your workflows and business objectives. Without backups, there's the risk that the time and investment spent configuring your Salesforce orgs will be lost.

Cost: The cost of data loss includes both the lost development work and additional labor hours needed to restore.

Wider business

Impact: As Salesforce is critical to core business objectives, losing your Salesforce data or metadata will have impacts across the business.

Cost: Alongside the cost of stalled business operations, there are backup-specific costs incurred from security and compliance failures. For example, GDPR fines can be as high as 10 million euros. There's also the huge cost of losing customer trust, which harms retention and lead generation.

The costs of Salesforce data loss are significant and, importantly, unpredictable — without an effective backup solution, there's no way to anticipate the timing, scale or impact of data loss, let alone your recovery from it.

The ROI of Salesforce backup

Given the real risks and costs of data loss on the Salesforce platform, most businesses are convinced that it's worth spending on a backup solution. But, recognizing that there are additional benefits to a backup solution — beyond saving your data in a worst-case scenario — allows teams to choose a backup solution that can also help them maximize the ROI of Salesforce.

Fulfillment of compliance requirements

Compliance regulations are a core business requirement but are a regular blocker, with 44% of teams reporting that they failed an audit, either internal or external, in their cloud environments in 2022. So, when picking a backup solution, you need to begin by considering whether this fits with your compliance commitments. There are multiple levels of regulatory compliance frameworks that you'll need to check, generally in this order:



1. Geographical

Depending on where your company and customers are based, you may be subject to geographical compliance frameworks, such as the protection given to residents of California by CCPA.



2. Industry

Each industry has unique compliance frameworks. For example, those handling medical data in the US are bound by HIPAA.



3. Company

Your company may have business-wide compliance regulations, such as ISO certifications, which impact your Salesforce orgs.



4. Your Salesforce Org

You may establish certain compliance procedures for your Salesforce orgs, such as backup frequency or retention period.



5. Your team

Within your team, you'll want to assign different levels of permissions. For example, it may only be suitable for a team lead to have access to all backups.

While you may be able to satisfy all of these requirements using a manual backup process, this will be costly and time-consuming. Instead, choosing the right backup solution will give you firm control of the data within your backups and will also enable you to meet data enquiry and deletion expectations. For example, encryption and delegated access allows you to restrict access to your backup data, ensuring that only the right people with the right permissions can access your backed up data. Similarly, mature Salesforce backup solutions allow you to delete records when necessary for compliance.

A backup solution not only helps you to remain compliant, but also gives you a complete audit trail so that you can easily demonstrate your compliance. Your backup solution should help you access and audit all of your backup histories, saving you the cost of labor hours during the compliance process.

Customer trust in your business is invaluable. With the support of a comprehensive backup solution, you will reduce the risk of data loss and be far more likely to meet compliance expectations — and, as a result, foster trust in your business and build your brand reputation, all helping to attract and retain customers.

Agile development

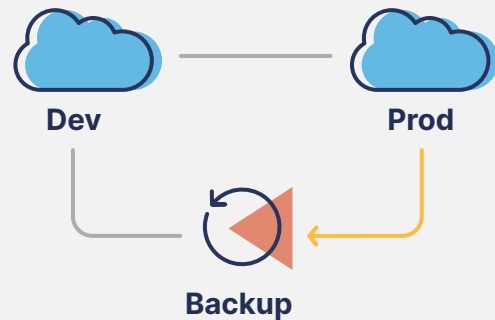
It's inevitable that releases will sometimes cause problems in your live environments, and could cause data loss. Being able to recover lost data or a stable version of your production code can give your development team the confidence they need to release new work quickly, underpinning an agile development process.

Agile development — the frequent release of new development work — helps your end users quickly see value, enabling your business to benefit from the development work far faster. Agile development has since evolved into the practice of DevOps — both approaches help development teams to work more efficiently and productively, meaning end users and the wider business see value much sooner. In fact, 63% of enterprises reported that their reason for adopting agile and DevOps was accelerated project delivery. (Gartner, Software Engineering Teams Must Learn to Deliver More Value, Keith Mann, March 28 2022)

A comprehensive backup solution supports agile development work throughout the process.

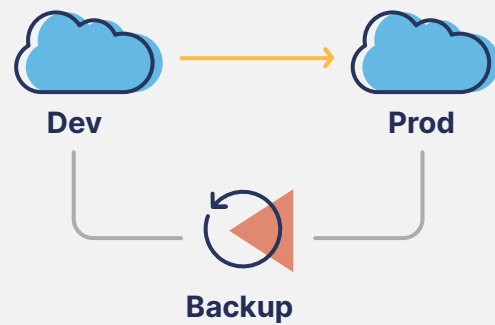
1. Backup before releases

Before new development work is released, the latest data and metadata from production is backed up. You can access this backup of production at any time during the development and release process.



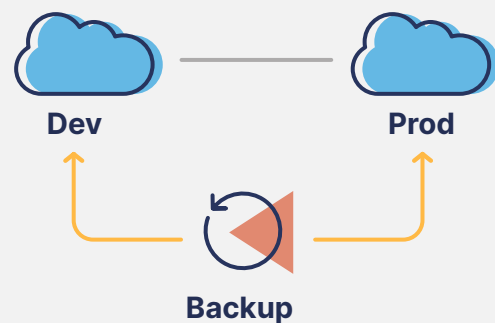
2. Confidence to frequently ship new features

Your developers can release features frequently because deployments are less scary when you know it's quick and painless to roll back or restore from a backup.



3. Any lost data and metadata can be restored to dev and then production

If your released error has caused data or metadata loss, then there's a quick process to restore from backup. First restore your data and metadata from the backup to the development environment, to verify that the restore is successful and won't cause further issues. Then, the backup can be restored to production.



While all of this occurs, your end users will experience minimal disruption and, once the bugged release has been fixed, will benefit from its value when it's re-released in the live environment.

Scalability

Though some teams are able to create a workable self-built backup tool, these are rarely time- or cost-effective. A self-built backup process will always require more manual maintenance than a third-party solution, wasting labor hours that could be better spent elsewhere.

Further, the cost of hosting your backups will only increase as your business scales. With more data to back up, you'll be forced to pay higher costs for hosting all of your backups. Purchasing a backup solution should mean having predictable licensing costs, rather than ballooning storage costs.

Some teams are able to make these self-built solutions work due to the dedication of select individuals, but this process will be overwhelmed as your business scales. So, it's desirable to opt for a third-party backup solution that will grow alongside your business.

The need for a comprehensive backup solution

Backup clearly has the potential to strengthen the relationship between Salesforce and the wider business — providing both an insurance policy for existing business-critical operations and the potential to generate further value. But, given the risks of data loss and the opportunity costs of failing to maximize your Salesforce development work, it's critical to choose a comprehensive backup solution that supports all stages of Salesforce development work.

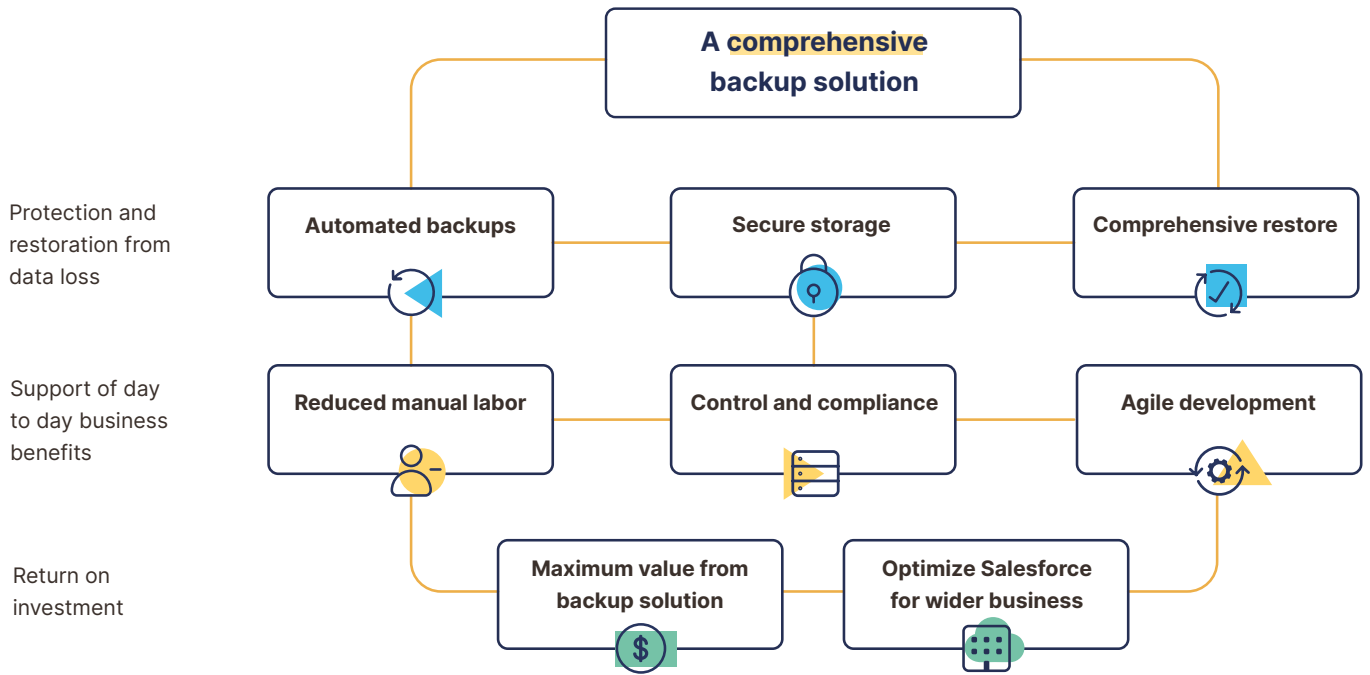
Tailored backups for Salesforce

There are backup solutions that cater to a range of SaaS platforms. However, these generic tools often overlook the nuances of the Salesforce platform and teams' release management processes.

“Teams must have a thorough understanding of Salesforce architecture to properly orchestrate the backup and recovery process to avoid data loss.”

Gartner, Streamline and Simplify Salesforce Backup and Recovery, *Bill Michael Hoeck, November 19 2019.*

It's critical to choose a backup solution that's tailored to the demands of the Salesforce platform. Gearset is the leading Salesforce DevOps platform, creating bespoke Salesforce solutions for end-to-end release management. This allows us to provide a backup solution that's tailored to both the complexities of the Salesforce platform and the team's wider development and release processes.



Automated backups reduce manual labor

With Salesforce-native tools, backup is a manual process that involves exporting .csv files of all of your data. Because of the length and hassle of this process, some teams opt to do this as infrequently as once a month, which significantly increases the amount of data that could be lost forever if an incident occurs.

With a comprehensive backup solution, these backups are automated. As each Salesforce team will have different requirements for the frequency of backup — based on their compliance restrictions or the amount of data they process, for example — it’s best to choose a solution that allows you to tailor the frequency of automated backups. With Gearset, you can choose how frequently you back up your data and metadata, and run backups on-demand at any point.

Automating the backup process also removes manual labor from your team, giving back hours that they can use to add value to your Salesforce org. This allows the team to unlock maximum ROI from Salesforce and gives them the peace of mind that backups are all running smoothly.

“While I’m making my first cup of coffee in the morning, I can open my phone and have a look to check everything ran fine last night. All good — delete the email.”

Chris Deutschmann

Sage People Configuration Consultant, Sage

Secure storage enables control and compliance

Control over your Salesforce data and the compliance of your handling processes is a key concern for the wider business. Thankfully, a comprehensive backup solution provides secure, scalable storage for your Salesforce data:

Scalability

A comprehensive backup solution shouldn't limit the amount of Salesforce data that you can securely store, allowing you to remain compliant as your business grows. Gearset's backup solution is fully scalable — you're not limited by the size of your data sets, meaning there's no risk of running out of storage space.

Security

Backups of your Salesforce data need to be held even more securely than the data in Salesforce itself, so that a measure for data protection doesn't create a vulnerability. Backups created through Gearset are stored securely on our AWS servers, and encrypted to enterprise-grade standards in transit and at rest. It's imperative to have complete control over your backups — who can access them, how they change over time, and how you remove data from them.

Permissions

You'll want to be able to assign different members of your Salesforce team appropriate levels of access to your backups, to uphold the principle of least privilege. With Gearset, you're able to assign degrees of access to your backups.

Compliance

You can always purge records from your backup history, if there are any deletion requests. Deletion requests made under data privacy laws can sink a lot of time, but Gearset makes it easy to purge records across all backups in your backup history. And the retention period for backups is configurable, so any compliance requirements can be accommodated.

Alongside these areas of concern for compliance officers in the wider-business, those working specifically with Salesforce will also be concerned with the protocol for monitoring your data and metadata. As a result, Gearset will give you full insight into the changing shape of your orgs' data and metadata. Visualize your backup history as a whole, or object by object, and access a full history of changes.

Further, one of the key ways to reduce the impact of Salesforce data loss is to spot it quickly. Gearset's smart alerts work to monitor your automated backups and alert you when a specified scale or type of data change has occurred. These can be integrated with emails or messaging services like Slack so that you will be alerted as quickly as possible.

"Without Gearset's monitoring, we could potentially go on for a couple of weeks before somebody asks 'hang on, why did this happen?', and then you've got to go back and kind of reverse engineer stuff to figure out why something happened."

Chris Deutschmann

Sage People Configuration Consultant, Sage

Quick and reliable restoration makes teams more agile

Salesforce data and metadata comes with some nuances, often having complex dependencies and hierarchies. As a result, it's critical that your backup solution understands the complexities of Salesforce data and metadata, and is able to restore with all of your hierarchies intact.

For complete protection of Salesforce orgs, a backup solution must be able to back up and restore metadata as effectively as data. This is needed both to protect the configuration represented by metadata, and to be able to restore the data held by that metadata. Gearset supports a much broader range of metadata types than competitor tools, and is able to handle complex Salesforce metadata that often cause restore processes to fail.

"During Salesforce's May 2019 service disruption, Gearset proved to be the most important utility in my team's software toolbox. Gearset's functionality was instrumental in getting us up-and-running and providing us with a pathway to recovery after our orgs (Production and all Sandboxes) were negatively impacted. I know I speak for my larger team when I say, thank goodness for Gearset."

Lance Sulton

Director, NextGen Healthcare

Gearset's configurable smart alerts and change monitoring jobs will warn you of any changes to your data and metadata that need investigating. This helps you identify anything that needs to be restored. You can restore anything from a single record to a complex data hierarchy, with intuitive workflow options best matched to each use case.

Because Gearset's backup solution is part of our end-to-end DevOps platform, it seamlessly integrates with all other aspects of your DevOps process — from development work to releases, and through to monitoring the data in your live environments. Teams using Gearset are able to back up on demand before risky releases, all from within the same platform. And if they need to restore data or metadata, the workflow is a familiar, well-tested one because it mirrors their usual release process.

“The fact that Gearset combines deployments and backups is a definite bonus. Having all those tools together just makes life so much easier for us!”

Chris Deutschmann

Sage People Configuration Consultant, Sage

The business case for a comprehensive backup solution

In the event of data loss, the investment in a comprehensive backup solution will always pay for itself. Though the initial cost may be higher than that of Salesforce-native tools, a backup solution is worthless if it doesn't allow you to restore when it really matters.

Though catastrophic data loss is a real possibility, the majority of teams are more likely to face small-scale disruptions. So, naturally, businesses want to justify the cost of a comprehensive backup solution beyond a worst-case scenario. Thankfully, there is a clear ROI from a backup solution, both in remedying low-level data disruption and streamlining dev work and compliance processes. This ROI stems from both the avoided costs of Salesforce data loss, and the scalability of the solution it will provide — let alone the peace of mind it will offer to your team and the knock-on wellbeing impacts that will bring.

If that's not enough, the additional, business-wide benefits of a backup solution — the ease of compliance, the promotion of agile development and cultural improvements — will deliver faster and greater ROI from Salesforce.

Insure your Salesforce investment and maximize ROI

Enlisting a new backup solution is never a quick decision — you need to be satisfied that your technical, compliance and budget concerns are satisfied. For a consultation to discuss your business needs and a demo of our backup solution, get in touch.

[Book a consultation](#)

There's no better way to see if a solution delivers than to let your team try it for size. Start a free 30-day trial of our entire platform.

[Start a free trial](#)

About Gearset

Gearset is the complete Salesforce DevOps solution, with powerful tools for unparalleled deployment success, continuous delivery, automated testing and backups. Thousands of Salesforce professionals have already used Gearset's cloud-based app to run millions of deployments, back up billions of records, and save billions of dollars through productivity improvements.

Founded in 2015 by DevOps experts, Gearset is designed to help every Salesforce team apply DevOps best practices to their development and release process, so they can rapidly and securely deliver higher-quality projects. With inbuilt intelligence that solves the fundamental challenges of Salesforce DevOps, Gearset is a uniquely reliable solution trusted by more than 2000 companies, including McKesson, Accenture and IBM.