



Beyond the Backup

Expanding the Value of Your Salesforce Data

Data has become a crucial competitive asset for businesses aiming to thrive and outpace their competitors. The strategic value of data, especially within ecosystems like Salesforce, cannot be overstated. CapStorm emerges as a pivotal solution provider in this domain, enabling organizations to transcend the confines of traditional data backup and embrace the full potential of their Salesforce data. Through actionable insights and strategic advantages offered by CapStorm, businesses can unlock new horizons of efficiency and innovation.

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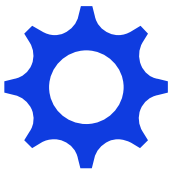
Introduction

Salesforce's CRM serves as the vehicle to drive innovation, growth and customer satisfaction through a robust data repository. With such an importance placed on data, a proper backup should be a part of everyone's business strategy. This will help curtail any disruptions in the event of data loss, but a backup isn't the only thing your Salesforce data is good for. Leveraging the data's full potential requires navigating beyond conventional backups to gather richer, more actionable insights. In today's competitive market, maximizing business outcomes is crucial. With more granular control over your Salesforce data, you can unlock untapped potential and gain valuable insights that can drive greater business outcomes.

CapStorm has pioneered effective Salesforce data management offering sophisticated solutions for data integration and analytics, data restoration, sandbox seeding, data archival, and data ownership. These solutions empower businesses to seamlessly integrate Salesforce data into their existing systems, enabling real-time analytics and insights that drive strategic decisions.

Moreover, CapStorm addresses the critical needs of data governance and compliance as part of a backup solution, helping businesses navigate the evolving landscape of regulatory requirements without sacrificing data utility.

Salesforce Data Stats



It's estimated that on average, **2.5 quintillion bytes** of Salesforce data are generated every day, opening up a plethora of opportunities for businesses.



Over **150,000 companies worldwide** across every sector are currently utilizing Salesforce to drive growth and operational efficiency.



49% of Salesforce's clients are small businesses with less than 50 employees, highlighting the CRM's value across organizations of all size.



90% of Fortune 500 companies utilize Salesforce to manage their business relationships.

With this much data readily available and in use across the globe, there are numerous ways to effectively manage your Salesforce data to make it work for you with the help of a self-hosted, data management solution. So get ready for a deeper understanding into how how CapStorm's self-hosted solutions transform Salesforce data from a static asset into a dynamic force that propels businesses forward. By navigating "Beyond the Backup," you'll begin to explore innovative strategies to leverage your Salesforce data for operational excellence and competitive advantage.

Go Beyond the Traditional Backup

Before diving into how to maximize the value of your Salesforce data, it's important to highlight how relying solely on Salesforce's native backup solutions presents a range of challenges. This includes significant challenges, such as gaps in data protection, data restoration limitations, and constraints in leveraging data for strategic decision-making.

Traditional SaaS backup solutions essentially trap data within their own proprietary environments, restricting its utility. CapStorm distinguishes itself by mirroring Salesforce data, and giving you control outside of the platform. This approach empowers businesses to utilize their data as they see fit, ensuring that they are not merely storing data but actively leveraging it for their advantage. Here are some of the limitations users may face:



Incomplete Data Protection: According to a report by the Harvard Business Review, traditional backup solutions often fail to capture the full scope of Salesforce data, including metadata, custom objects, and attached files. This results in backups that are not comprehensive, leaving critical data unprotected, potentially leading to significant gaps in historical data continuity.



Complex Restoration Processes: Restoring Salesforce data in-platform is complex due to the intricate relationships between various data objects, the platform's detailed security model, and the need for precision in reinstating data and metadata. A Gartner report highlights that 80% of organizations restoring data from traditional backups faced significant challenges due to the complex interdependencies within their data models. This complexity is heightened by Salesforce's customizable nature, requiring specialized knowledge to ensure accurate and complete data restoration.



Limited Accessibility: Data stored in proprietary backup formats is often inaccessible for everyday use. This severely restricts the organization's ability to perform data analysis, strategic planning, and real-time decision-making. The data, while technically "safe," becomes siloed and underutilized, failing to contribute to strategic business initiatives.



Regulatory and Compliance Risks: Traditional backup solutions may not fully comply with industry regulations and standards, posing potential legal and financial risks. Inadequate data protection and retention practices can lead to non-compliance with regulations such as GDPR, HIPAA, and more, resulting in significant penalties. In 2023, over \$2 billion in fines were imposed in the EU due to violations of GDPR alone.

Now that you have a feel for the limitations that come from Salesforce's native backup solutions, including gaps in data protection and inaccessible data that can hamper your business development, it's time to learn the ways CapStorm's solutions help you maximize your Salesforce data beyond just a backup.

Data Integration and Analytics

CapStorm's solutions change how businesses approach data integration and analytics within the Salesforce ecosystem. By breaking down the barriers of data silos, CapStorm empowers organizations to harness the full potential of their data, ensuring it acts as a cohesive unit that drives strategic insights and operational efficiencies. By leveraging CapStorm's approach to data integration and analytics, these insights like sales forecasts and other activities can be tracked in granular detail over a period of years, not just the limited 90-day timeline offered by Salesforce's native tools, transforming your business in the following ways:

- 1 Breaking Down Data Silos:** CapStorm enables fluid integration of Salesforce data with other critical business systems, including ERP, CRM, and BI tools. This integration fosters a unified data ecosystem, dismantling the barriers of data silos. For instance, a retail company could synchronize its Salesforce CRM data with its ERP system, ensuring that customer interactions are directly linked with inventory and order management. This would empower the sales team to better target which products have a higher impact in the market.
- 2 Automated Data Flows:** Recognizing the complexities of data migration and synchronization, CapStorm allows for Automated Data Flows. This feature streamlines the process, substantially reducing the risk of errors that come with manual processes.
- 3 Enhancing Real-Time Analytics:** CapStorm empowers businesses to leverage powerful analytics, transforming raw data into actionable insights with near-real-time capabilities. This functionality is pivotal for organizations aiming to respond swiftly to market trends or consumer behavior. Users can pull data from any point-in-time, as they are no longer subjected to Salesforce's native limits.
- 4 Achieving Compliance and Governance:** As data breaches are becoming increasingly common and regulatory landscapes more complex, CapStorm ensures robust security measures are in place. Users can facilitate compliance with stringent regulations like GDPR and CCPA, and enable granular access controls. This ensures sensitive data or personally identifiable information (PII) is protected across systems.

One example would be a pharmaceutical company leveraging CapStorm to implement tailored access controls, ensuring that only authorized personnel can access patient data from a drug trial, aligning with regulatory standards.

Through the strategic use of Salesforce data, organizations can unlock unprecedented levels of analytics and gain a competitive advantage.

**Enabling Executive Decisions
by AWS Data Integration**

[Check Out the Case Study](#)

Data Restoration

Data restoration is pivotal for mitigating the impact of business disruptions, whether they stem from human error, software malfunctions, or malicious attacks. The ability to quickly revert to a pre-incident state ensures that operations can resume with minimal downtime, safeguarding revenue streams, customer relationships, and brand reputation. Moreover, in environments as dynamic and interconnected as Salesforce, preserving the web of data relationships is essential for maintaining the accuracy and functionality of business processes.

- 1 Point-in-Time Recovery:** CapStorm excels with its data recovery capability, allowing businesses to restore Salesforce data to an exact point-in-time before an incident. This precision minimizes data loss and operational disruption, crucial for maintaining business continuity and preventing negative impacts to an organization's bottom line. Imagine a scenario where a critical update inadvertently corrupts a dataset. CapStorm enables the organization to recover data to the time before an incident occurs, ensuring business processes remain unaffected.
- 2 Comprehensive Relationship Restoration:** What sets CapStorm apart is its ability to not just recover data but to faithfully restore data relationships within a Salesforce org - no matter how complex or deep the relationship level. This feature ensures that when data is restored, it retains its referential integrity, preserving the relationships of Salesforce objects no matter the level. For instance, restoring a customer record isn't just about the contact details; it's about maintaining the history of interactions, service tickets, and associated sales opportunities, thereby ensuring seamless continuity in customer engagement and internal workflows.
- 3 Efficient Disaster Recovery:** CapStorm's solution includes advanced testing and validation protocols, providing businesses the confidence to implement and test disaster recovery plans without impacting their live Salesforce environment. This preemptive approach enables organizations to refine their recovery strategies, ensuring they are prepared for any eventuality. For example, a company can simulate a data breach or loss scenario to assess and improve their restoration readiness, all without risking their actual data or operational integrity.

By utilizing a proper restoration solution, businesses using Salesforce gain a robust framework for not just protecting against data loss but also ensuring that the impact of any data incidents is as minimal as possible.

"A 15-minute return point object (RPO) requires that you have a backup every 15 minutes, meaning that the most data that you can lose is 15 minutes of data. A once-a-day backup means that you can lose up to 24 hours worth of data. How much data are you willing to lose? That's why a proper data restoration solution is pivotal to your recovery efforts."

Rebecca Gray, CapStorm Customer Success Lead

Sandbox Seeding

Sandbox seeding is a vital concept in the Salesforce ecosystem, allowing developers, architects, and administrators to test new features, integrations, and customizations in a safe, controlled environment. This process involves populating a Salesforce sandbox – a replica of the live environment – with specific data sets, enabling accurate testing without affecting actual user operations or data integrity. Traditional methods of sandbox seeding come with their own set of challenges:



High Costs and Restrictions: Full-copy sandboxes, while more accurate, can be prohibitively expensive and subject to limitations on how often you can refresh them, restricting agility and innovation as the data might not be the most up-to-date.



Data Privacy and Compliance Risks: Replicating sensitive data into sandbox environments raises significant privacy and compliance concerns, as the data should only be viewable by those with proper user-access controls to prevent leaks.

With CapStorm, developers have access to realistic, compliant, and project-specific data environments with the following benefits:

Tailored Data Replication: The solutions offer a highly customized approach to data replication into sandbox environments. It ensures the preservation of record relationships, allowing developers to work with data sets that reflect the specific needs of their projects.

Compliance: With CapStorm, sensitive Salesforce data can be anonymized during the seeding process, addressing privacy concerns and ensuring compliance with regulations.

Benefits for Businesses

CapStorm's approach to sandbox seeding offers businesses several key advantages:

1

Enhanced Testing Accuracy: By providing environments that closely mirror the production system, CapStorm ensures that testing is comprehensive and reflective of real-world business data.

2

Cost Efficiency: CapStorm's solutions reduce the need for expensive full-copy sandboxes and eliminates the overhead associated with manual data management.

3

Faster Time-to-Market: Streamlined sandbox management and the ability to rapidly build seeding configurations mean developers can move from concept to deployment quicker than ever.

Territory-Based Sandbox Seeding for Veeva

[Check Out the Case Study](#)

Data Archival

Having large amounts of Salesforce data in your org can lead to several challenges to keep it safe and secure, but efficient data archival strategies allow businesses to manage their data lifecycle with ease. This ensures that valuable data is stored securely and can be accessed or recovered when needed. Here are some of the ways your Salesforce data can benefit from a data archival solution:

- 1 Salesforce Storage Costs Kept In Check**

As Salesforce environments grow, so do the costs associated with data storage. However, not all data holds equal value for day-to-day operations. CS:Archive introduces an intelligent archiving strategy that identifies and segregates seldom-used or outdated records. By archiving this less critical data, businesses can significantly reduce storage costs without compromising data accessibility.
- 2 Simplified Compliance**

Adhering to record retention regulations is a complex yet crucial aspect of managing Salesforce data. CS:Archive eases this process through intuitive features like like cascade deletes and visualizers for archive storage, which allow businesses to seamlessly align with regulatory requirements.
- 3 Increased Performance**

An overloaded system can hinder performance, leading to slower data retrieval times and a suboptimal user experience. CS:Archive addresses this challenge head-on by decluttering Salesforce instances, thereby improving data retrieval speeds and overall system performance. This streamlined environment enables users to focus on leveraging high-value data, thus driving operational efficiency and productivity.

The strategic approach offered through data archival not only secures data for future needs but also supports a more streamlined and efficient operational workflow.

**TeamLease Saves 400%
In Storage Costs**

[Check Out the Case Study](#)

“You can use your existing infrastructure to limit future increases in your Salesforce storage bill substantially. Meet retention requirements while Archiving, Viewing and Managing required data that’s not necessary for day to day operations. This will limit the data that needs to be kept in Salesforce for pennies on the dollar.”

Ben Melton, CapStorm Senior Product Manager

Data Ownership

CapStorm's approach to Salesforce data management provides true data ownership, enabling businesses to retain complete control and autonomy over their Salesforce data. It involves the ability to:



Store data in a chosen environment that aligns with organizational security and compliance requirements.



Access data without restrictions imposed by third-party platforms or vendors.



Utilize data, including for analysis, insights, and driving business decisions, without compromising on privacy or security.

This level of control is vital for businesses to navigate the complexities of regulatory compliance, safeguard sensitive information, and harness data for competitive advantage.

Benefits of Self-Hosted Data Ownership:

CapStorm's philosophy on Salesforce data management is based on the concept of true data ownership. Unlike traditional models that may rely heavily on cloud vendors for data storage and management, CapStorm empowers organizations with the following:

- 1 Enhanced Security and Flexibility:** Storing Salesforce data on your own infrastructure amplifies your security posture through direct application of user access controls and encryption, tailored to your specific organizational policies.
- 2 Empowered Innovation:** True data ownership provides the agility to tailor data management practices to your business's evolving needs. Be it scaling storage, performing on-demand data restorations, or customizing access controls, CapStorm's solution ensures your organization remains agile, responsive, and innovative.
- 3 Breaking Down Data Silos:** With CapStorm, data autonomy extends beyond simple access, ensuring data is interoperable and readily verifiable off-platform. This dismantles data silos, enhancing collaboration and maximizing the ROI on your Salesforce investment by unlocking new avenues for data utilization and insights

By advocating for and enabling true data ownership, CapStorm offers businesses a clear path to leveraging their Salesforce data as a strategic asset.

"The world is rapidly driving toward a SaaS-first approach when it comes to enterprise applications. However, organizations in highly-regulated industries, specifically with sensitive data, often do not have the luxury of going "SaaS First" or "SaaS Only". This trifecta of ease of use, security, and usefulness is where CapStorm sees the greatest opportunity to help regulated industries make their data useful...without giving an inch on their security posture."

Drew Niemann, CapStorm Go-to-Market Lead

Summary

The strategic value of data, especially within ecosystems like Salesforce, cannot be overstated. CapStorm emerges as a solution that enables you to transcend the confines of traditional Salesforce data backups and embrace the full potential of your Salesforce data. This solution not only protects sensitive data but also enhances accessibility, providing deep insights and a range of benefits that go far beyond mere data backup.

Key Benefits of Utilizing CapStorm's Solutions

From the outset, CapStorm provides a suite of solutions that:

Ensure Comprehensive Data Protection: Go beyond standard backup coverage to safeguard every aspect of your Salesforce data, including metadata, custom objects, and files.

Simplify Complex Restoration: Leverage intuitive tools designed for the restoration needs of Salesforce, making data recovery precise and straightforward.

Enhance Accessibility and Usability: Transform data into actionable insights -- readily accessible for strategic analysis and decision-making anytime you need it.

Align with Regulatory Compliance: Maintain peace of mind with data management practices that comply with stringent industry regulations and standards.

These foundational benefits will enhance your data protection strategy by giving you control over your Salesforce data.

Discover the Value Beyond Your Backup

- 1 Empowering Data Integration and Analytics:** CapStorm dismantles data silos, enabling seamless integration with key business systems to enhance real-time decision-making and analytics.
- 2 Revolutionizing Data Restoration:** With CapStorm, you will benefit from precise, disruption-minimizing data restoration, ensuring continuity and integrity.
- 3 Optimizing Sandbox Seeding:** CapStorm's approach to sandbox seeding enhances development workflows by replicating accurate, real-world data scenarios.
- 4 Streamlining Data Archival:** Efficient data lifecycle management with CapStorm ensures optimized storage costs, simplified compliance, and improved system performance.
- 5 Enabling True Data Ownership:** CapStorm grants you unprecedented control over your Salesforce data, fostering innovation and securing data autonomy.

Contact Us

Moving beyond traditional backup solutions is not just an option but a necessity for businesses aiming to fully leverage their Salesforce data. CapStorm's innovative solutions, particularly CopyStorm, empower organizations to achieve true data autonomy, unlocking new dimensions of business intelligence, operational efficiency, and strategic decision-making.

If you're looking to transform your organization's Salesforce data management process, we're here to help.

To learn more about CapStorm's solutions and products, click the link below to connect with our team.

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About CapStorm?**

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