

**Salesforce
Data Protection:
Maintaining
Resilience and
Business Continuity
at All Times**





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Introduction

In today's fast-paced and data-driven business landscape, Salesforce has become a mission-critical application for organizations across industries. The customer insights, sales pipelines, and operational workflows powered by Salesforce data are the lifeblood of modern enterprises—the fuel that drives innovation, growth, and competitive advantage.

However, with great power comes great risk. The looming possibility of data loss, corruption, and downtime in Salesforce are ever-present. And any one of these scenarios can lead to significant disruption, compliance issues, and financial losses. From accidental deletions and integration failures to ransomware attacks and insider threats, the dangers are many and varied. As Salesforce data volumes and complexity continue to grow, manual backup processes and piecemeal solutions are no longer sufficient to keep this critical information safe.

This ebook explores the key challenges associated with safeguarding Salesforce data and outlines the essential capabilities needed in a world-class data security and cyber resilience solution. We'll share best practices for designing a holistic data protection strategy that aligns stakeholders, processes, and priorities across your organization. Finally, we'll introduce Rubrik's purpose-built platform and demonstrate how it empowers businesses to achieve true resilience and business continuity for their Salesforce environments.



1

Understanding the Data Protection Landscape

The modern enterprise runs on data, with Salesforce at the center of crucial customer insights, sales intelligence, and operational workflows. However, this crucial position also heightens the potential impact of any data loss or data integrity issues, which could lead to serious business repercussions.

Common causes of data loss include accidental deletions by users, data loader errors during imports or updates, failed integrations with other systems, malicious insider threats, and sophisticated cyberattacks, like ransomware. In a complex relational database like Salesforce, a single data issue can have cascading effects, orphaning related records, corrupting downstream analytics, and potentially crippling cross-functional processes.

The costs of such incidents are substantial. According to Forrester research, 75% of organizations suffered a Salesforce data loss event in the past year, with an average \$2.5 million cost per incident from factors like:



Lost productivity from user and operational downtime



Revenue impacts from disrupted sales, marketing, and service delivery



Expensive data recovery and remediation efforts



Regulatory penalties for non-compliance with data protection mandates



Reputational damage from public data breaches or privacy violations

Despite these risks, many organizations still rely on manual export processes, bespoke scripts, or limited backup tools to protect Salesforce data. As environments grow, these ad-hoc approaches become increasingly complex and ineffective—burdening IT teams while exposing businesses to data loss.



2

Essential Capabilities for Salesforce Data Protection

Protecting Salesforce data requires a robust, enterprise-grade solution with specific capabilities to ensure resilience and business continuity. Key requirements include:



Comprehensive Coverage

The ability to back up all production data across standard and custom Salesforce objects, fields, files, and metadata. Support for multiple orgs is also critical.



Automated Backups

Policy-driven job scheduling allows frequent, lights-out backup of Salesforce environments based on desired frequencies and retention periods—eliminating manual overhead.



Granular Recovery

Fast, flexible restore options for individual Salesforce components like records, objects, and metadata—not just full org rollbacks. Granular search is also vital for targeted, precise recovery.



Data Integrity

During backup and restore processes, solutions must maintain all parent-child relationships and data hierarchies to avoid corruption or missing and orphaned records.



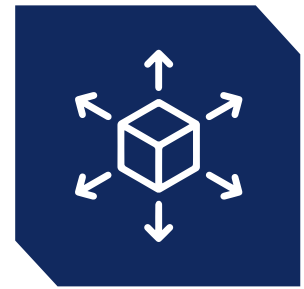
Robust Security

Backup data often contains sensitive customer information, so solutions must provide encryption, immutable storage, air-gapping, and other safeguards to protect against threats.



Governance-Friendly

Capabilities like flexible retention, audit logging, and compliance reporting to help manage complex business requirements for your data.



Enterprise Scalability

As Salesforce usage grows, the solution must scale seamlessly to accommodate rising data volumes without performance impacts.



Ease of Use

An intuitive interface and automated capabilities allow Salesforce admins to manage backup/restore processes without extensive training.

By prioritizing these key requirements, organizations can find a solution best suited to delivering true Salesforce data resilience.



3

Building a Comprehensive Data Protection Strategy

Implementing a Salesforce backup tool is just one part of an effective data protection program. To maximize resilience and minimize risk, a holistic strategy that aligns people, processes, and technology is essential.



Define Recovery Objectives

Work with stakeholders to set Recovery Point Objectives (RPOs) and Recovery Time Objectives (RTOs) based on the criticality of each Salesforce data set and application. Aligning on these targets is foundational.



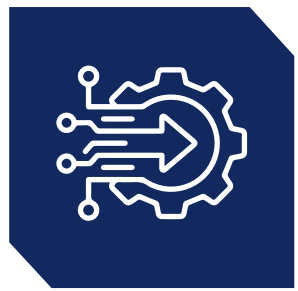
Map Compliance Mandates

Engage compliance/legal teams to understand the regulatory obligations for data protection, retention, and privacy that apply to your business. Then configure backup policies accordingly to ensure adherence.



Assign Responsibilities

Protecting Salesforce is a team effort requiring coordination between admins, IT ops, security, and compliance personnel. Clearly define roles and consider a data protection center of excellence.



Integrate with BC/DR Plans

The Salesforce strategy should seamlessly align with broader business continuity and disaster recovery initiatives—including consistent RTO/RPO targets and integrated recovery procedures.



Test Relentlessly

No strategy is complete without frequent testing of backup validity and restore procedures across scenarios. The more practice, the better prepared teams will be.

By following these best practices, organizations can develop a Salesforce-focused strategy that safeguards critical data while supporting key business objectives around resilience and risk reduction.



4

Introducing Rubrik's Comprehensive Solution

Throughout this eBook, we've explored the challenges of Salesforce data protection and outlined the essential solution capabilities required for true resilience. Now, let's take a look at Rubrik's comprehensive platform.

Rubrik provides a purpose-built, tightly integrated solution to protect and recover data across all Salesforce orgs. Key capabilities and differentiators include:



Complete Coverage

Automated discovery and backup of all Salesforce data objects, fields, files, and metadata across production and non-production environments.



Automated Protection

Policy-driven job scheduling and flexible retention periods that minimize management overhead while ensuring adherence to recovery point objectives.



Rapid, Granular Recovery

The ability to perform granular, precise restores of individual Salesforce components with just a few clicks. Live data viewing to enable confident, accurate recoveries.





Data Integrity Assured

Rubrik maintains all parent-child relationships and data hierarchies, avoiding orphaned and missing records or corruption during backup and restore processes.



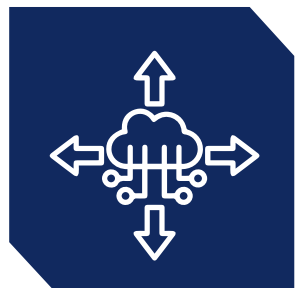
Unmatched Security

Backups are immutable, with data encrypted in-flight and at-rest. Role-based access controls and multi-factor authentication lock down the platform.



Governance Support

Flexible retention policies, comprehensive audit trails, and out-of-the-box reporting to help you manage data requirements for your business.



Cloud-Scale Architecture

Rubrik's cloud-native solution scales linearly on-demand as Salesforce environments grow, with no degradation in backup or restore performance.



Consumer-Grade Experience

A radically simple interface and policy-driven automation allow even Salesforce admins to manage data protection with minimal training.



Unified Data Resilience

Consolidate backup and recovery of Salesforce alongside other enterprise workloads on Rubrik's single software fabric for streamlined data management.

Salesforce is a critical tool for organizations in every industry. The customer data, sales processes, and daily operations running on Salesforce are the heart of modern businesses.

But, as we've explored throughout this ebook, the risks of data loss, corruption, and downtime in Salesforce are all too real—and the consequences can be devastating. From accidental deletions and integration failures to ransomware attacks and insider threats, the dangers are many and varied. And with ever-growing data volumes and complexity, manual backup processes and piecemeal solutions are no longer enough to keep critical information safe.

That's why a comprehensive, automated, and scalable approach to Salesforce data protection is so essential. By implementing a solution that delivers the key capabilities we've outlined—including complete data and metadata coverage, frequent and granular backups, rapid and flexible restore options, robust security and compliance features, and unified visibility and reporting—organizations can achieve true peace of mind in the face of rising data challenges.

But technology is only part of the equation. Developing a holistic data protection strategy that aligns people, processes, and priorities across the organization is equally important. By defining clear recovery objectives, assigning roles and responsibilities, aligning with broader BC/DR initiatives, and continuously testing and validating recovery plans, businesses can build a culture of resilience.

Rubrik is committed to helping organizations achieve this vision. With our proven track record, deep Salesforce expertise, and cutting-edge data protection platform, we empower businesses to take control of their data destiny—and safeguard their most valuable information assets. Our automated, policy-driven approach simplifies backup and recovery processes, while our unified platform streamlines data management across Salesforce and other enterprise workloads. Thousands of customers around the world trust Rubrik's SaaS data protection to minimize downtime and maximize peace of mind.

The result is a new standard for Salesforce data resilience—one that combines robust protection, intelligent insights, and effortless control to keep your business moving forward. No matter how large or complex your Salesforce environment, Rubrik is here to help you protect your data, ensure business continuity, and drive competitive advantage.

The journey towards Salesforce data resilience starts here. [Contact Rubrik today to learn more](#), and take the first step towards a brighter, more secure future for your business. Together, we can ensure that your Salesforce data remains a source of strength, not risk—and that your organization is always ready for what's next.

