

Buyer's Guide

Salesforce Backup and Restore



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Introduction

Congratulations.

By reading this, you already recognize that protecting your Salesforce data is critical, and you're embracing your role in the shared responsibility model. Now, it's up to you to find a solution and gain buy-in from other stakeholders across the org.

To help with that process, Own has developed this buyer's guide as you search for the best possible tool to fit the needs of your organization. The guide contains 16 factors to consider, which we've organized into five categories: Backup, Restore, Leverage, Customer Support & Experience, and Cost Predictability & Value — to make it easier to follow.

Even if you don't end up choosing Own as your partner, we hope this guide better equips you to choose the solution that's right for you. Consider this your go-to playbook for choosing your backup and recovery solution.

What to Consider when Evaluating Backup and Recovery Solutions

Backup



Salesforce Dependency

Why it's important:

Just like you wouldn't store your spare car keys in your glove compartment, accessing your data backups through the same login where you store your live data is NOT a best practice. While Salesforce is the most secure and available SaaS platform out there, they aren't immune to outages.

By storing your backups outside of Salesforce, your important data will still be available in the event of an outage. However, backing the data up to a personal hard drive or S3 server isn't the answer either, since providing access to those who might need the data poses a security risk.

Accessing your data backups through the same login where you store your live data is NOT a best practice.

Questions to ask:

- If Salesforce goes down, how will I access my backup data?
- Will my data be in a format that I can swiftly use outside of Salesforce?
- Can I export my backup if I want to import my data into a data lake or some other system?

Backup Coverage

Why it's important:

Any Salesforce admin will tell you that Salesforce metadata is integral to how their users interact with the platform. Despite this importance, metadata isn't always included in Salesforce backup solutions, meaning that profiles, permissions, reports and dashboards would be unrecoverable if lost or corrupted. You also need to make sure that the solution you choose backs up files and attachments, so that the unstructured data associated with your business processes is protected.

Finally, make sure new custom objects you create are automatically backed up. Otherwise, your backup coverage may not be as complete as you think.

Questions to ask:

- Do you back up metadata?
- Do you back up files and attachments?
- Are new objects automatically backed up?

Compliance and Retention

Why it's important:

Global organizations running on Salesforce are being challenged to keep up with an ever-growing list of geographic and industry regulations.

While some regulations such as SEC 17a-4, HIPAA, and CFR Part 11 require that data be retained and accessible for extended periods of time, others like GDPR and CCPA require companies to do just the opposite. While these requirements may not always be clear, one thing is: This fluid environment highlights the need for customized data retention policies within your backups.

Questions to ask:

- What capabilities are available to streamline GDPR customer requests to remove or rectify data in backup files?
- Is your solution HIPAA compliant?
- What are the costs associated with retaining my backups for longer periods of time?
- Can I customize data retention policies?

Security

Why it's important:

Whether your data is on a laptop, a local server, or in the cloud, the company that owns the data is responsible for ensuring its security.

When considering the security of your Salesforce data, you should rely on a solution that is reputable, has passed Salesforce security reviews, and has built-in platform security features that meet enterprise needs.

Saving .CSV files of your Salesforce data within the company hard drive or your laptop should NOT be considered a best practice.

Questions to ask:

- What cloud storage service providers do you use?
- How do you monitor who has access to my data?
- Do you offer Role-Based Access Controls?
- Is data encrypted in transit and at rest?
- Can I use my own key management system?
- In which countries will my data be stored?
- Have your security and information management practices been certified as SOC 2 Type 2 compliant?

Centralized Access to Backups

Why it's important:

Does your company have multiple Salesforce production orgs? If so, you'll want a solution that allows you to manage all your backups from a single dashboard. You'll also want a solution that will allow you to compare backups across orgs, so that you can identify differences and changes between 2 environments. By centralizing access, you can easily manage and monitor backups for business units across the enterprise, as well as easily add backup services to new orgs as needed.

Questions to ask:

- Will I have a single "pane of glass" to view my backups across all orgs?
- Can I compare backups across two different orgs?
- Can I manage multiple orgs with a single login?

Backup Frequency

Why it's important:

Ideally, to minimize your recovery point objective, you should be backing up your Salesforce data at least once a day. But having the option to backup **more frequently** than daily is important, especially for mission-critical data that changes frequently. The ability to back up on-demand is also extremely valuable when you're making large scale changes. You can back up your data immediately before making changes and can easily revert your data in case anything goes wrong.

Questions to ask:

- Can I back up data on demand?
- How frequently can I back up data?
- Can I initiate backups programmatically through an API?

What to Consider when Evaluating Backup and Recovery Solutions

Restore

Proactive Monitoring

Why it's important:

A typical Salesforce environment has integrations, batch updates, cleanups and code deployments that run regularly, making it difficult to spot unwanted data loss and corruption yourself. And if it's malicious activity that's designed to be hard to detect, you may not be able to spot it at all. That's why having tools to proactively monitor for data loss or corruption is key. This way, you can be notified when the volume of changes to your data are abnormally high, and ultimately restore the data faster.

Questions to ask:

- Will the system alert me to any significant changes to my Salesforce data and, if so, how?
- Can I set certain thresholds that will trigger an alert to be sent?
- Are thresholds absolute, or can I ask to be notified when activity levels are out of the normal ranges?

Analysis Tools

Why it's important:

Knowing when things go wrong is important. But you also need to be able to know when the data was last correct, so you can pick the right backups to restore from and ensure the right data gets back into Salesforce. Be sure to choose a backup solution that allows you to see how an object changes over time, so you can pinpoint exactly the right backup to restore from.

Questions to ask:

- Will the solution help me understand which objects have been subject to loss and corruption?
- Will the solution help me understand the scale of loss or corruption?
- Does the solution have capabilities to help me understand how data values in records and fields have changed?

Precision Repair Capabilities

Why it's important:

By their very nature, SaaS applications like Salesforce are built to help companies capture and organize data changes in real time. While some solutions may allow you to restore a selected object to a selected point in time, they may force you to restore all the records for that object, potentially undoing some desired changes. Or they may allow you to restore specific records, but force you to restore all the fields. Be sure that your backup solution allows you to restore not just specific records, but specific fields with unwanted changes, so you don't overwrite good data when trying to fix bad data.

Questions to ask:

- Can I easily specify the set of records that need to be restored, even if those impacted records number in the hundreds or more?
- How easily can I fix unwanted changes without affecting valid data?
- How easily can I restore just selected fields?

What to Consider when Evaluating Backup and Recovery Solutions

Leverage



Search Capabilities

Why it's important:

Since your backup files are complete copies of your Salesforce data at different points in time, they effectively capture the history of your business. Your backup solution should be able to help you tap into this data. By having your backups searchable, you easily find any record and see how it looked at any point in time in the past. This can be particularly helpful when you need to identify specific data for an audit or other compliance needs. As part of your backup solution's search functionality, it's especially helpful to have keyword searching capabilities. Otherwise, it would be too time consuming to find the data among so many records.

Questions to ask:

- Are backups searchable?
- Can I search my backups by keyword?
- Can multiple backups be searched with one query?
- Can keyword searches be restricted to specific objects?

Export Capabilities

Why it's important:

Being able to export your backup data is valuable in several ways. First, exports make a great delivery mechanism for up-to-date data to warehouses and lakes that many organizations use for data analysis. Exports also can also give you additional peace of mind that you have a full, independent copy of your backed up data available to you no matter what happens to your relationship with a particular vendor. Finally, exports can be a way to access your important data and ensure continuity when Salesforce is down.

Questions to ask:

- Can I securely export data to file-based storage like AWS S3 or Azure?
- Can I export to data stores like Snowflake and My SQL?
- Are there file size restrictions with Exports?
- Can exports be automated and scheduled?

What to Consider when Evaluating
Backup and Recovery Solutions

Customer Experience & Support



Proof of Concept

Why it's important:

Conducting a Proof of Concept (POC) where you test the solution with YOUR data is a critical step of the SaaS buying process.

Some vendors endeavor to not let prospective customers undertake full hands-on trials of their solutions using the customer's own data and may leverage a significant discount or incentive to win your business. The use of a data set supplied by a vendor masks the reality of using the solution, and any unwillingness to provide a POC at all typically speaks volumes about the user experience or reliability of the solution.

Questions to ask:

- Can I conduct a POC using my own data?
- How long does it take to implement your solution with our data in Salesforce?
- Will I be hands-on with the solution myself?
- What kind of data loss or corruption scenarios should I use to test the robustness of your solution?
- Will you provide what kind of tests we should perform during the POC?
- Do you offer a POC at no-cost to us during this sales cycle?

Support

Why it's important:

There are no weekends, holidays or time zones when it comes to data incidents. When the pressure is on, you must have complete trust in the ability of your vendor to help you promptly return to business as usual.

Look into solutions that offer 24/7 customer support with a reasonable response time. Other types of support can include a self-service knowledge base, professional services, or even a dedicated technical account manager. Evaluate which support elements are necessities for your organization, and you will be one step closer to choosing a winning solution.

Questions to ask:

- What kind of support is available should I need to restore data?
- What support options and SLAs do you offer?
- How much real-world experience do your support reps have in helping customers recover from incidents?
- Is your support team certified by Salesforce? What credentials do they have?
- Where are your support agents based? Can they support a global organization with employees all across the world or in a specific country/region?

Innovation and Vision

Why it's important:

As your organization grows, so will the volume of data you'll need to manage. Is the company continually innovating and developing their solutions to support evolving best practices? Or are their solutions stagnant?

Another aspect of innovation involves responding to customer feedback. Instead of making customers adapt to a rigid solution, innovative backup and recovery providers will continue to evolve their product based on their customers' pain points.

Finally, does the vendor provide just a backup and recovery tool? Or do they offer complimentary products (data security, archiving, etc.) as part of a broader SaaS data protection solution?

Questions to ask:

- How often do you release new functionality?
- How do you stay up-to-date with all the innovations and changes that Salesforce makes to their platform?
- Do you outsource or hire contractors that perform any work on your product platform?
- What are your hiring plans for engineering in the coming year?
- How do you maintain engineering excellence in your organization?

Track Record and Reputation

Why it's important:

Of all of the factors to consider when choosing a backup and recovery solution, this might be the most important. Most every software vendor positions itself as the best in the market, the most tailored, the most experienced, etc. But who can you really trust?

Separating fact from hyperbole is not easy but is important as failure to do so runs the risk of you having to replace your new solution as soon as the contract ends — or sooner!

Questions to ask:

- How many reviews do you have on the Salesforce AppExchange? How do you rank against other vendors that are listed?
- Where are you positioned on the G2 SaaS Backup grid?
- Can you provide a customer reference that I can talk to about your solution?

What to Consider when Evaluating Backup and Recovery Solutions

Cost Predictability & Value



Pricing Model and Storage Limits

Why it's important:

If you're like most Salesforce customers, the data you need to protect is growing rapidly. In fact, when looking just at our own customers, their backups grew by an average of 42% last year. This is why having unlimited backup storage is important, especially as you budget for your backup solution. If you opt for a solution with storage-based pricing, accurately budgeting for future costs will be difficult. While the data is bound to grow, the rate of that growth can be hard to predict.

Questions to ask:

- Please break down your pricing model. Do you charge per user, per byte of storage, other fees or costs we need to be aware of?
- Will retaining my backup for longer periods of time increase my costs?
- What are the storage volumes on which your pricing tiers are based?
- What do you charge for implementation of the solution?
- What actions are not covered in the contract?

Eliminate Data Downtime with Own

At Own, our mission is to help customers own and protect their data on any SaaS platform. That's why we built a solution that proactively protects SaaS data, so our customers never have to worry about data loss disrupting their business. In fact, we restore data to clients' production environments more than 250 times per month. They usually recover any lost or corrupted data in less than one day, compared to over a week for most non-customers. Our customers also feel 3x more prepared to restore from a data loss or corruption than non-customers.

[Read the Reviews](#) →

[Request a Demo](#) →

Backup and Recovery Evaluation Checklist

Please feel free to download and print our backup and recovery scorecard to help you evaluate strengths and weaknesses across multiple vendors during your buyer's journey.

[Download Scorecard](#) →

Competitive Scoring Checklist											
Place a copy or print this sheet to score the solutions you are evaluating based on each decision criteria. This first row has been filled out as an example.											
Decision Criteria	CUSTOMER OPTIONS								CUSTOMER IMPACT		
	Solution A	Solution B	Solution C	Solution D	Solution E	Solution F	Subtotal /DV	No Action (DS)	Revenue	Cost	Experience
Salesforce Dependency	7	5	8	3	3	2	4	1		-\$	👍
Compliance and Retention											
Security											
Certified Access to Backups											
Backup Coverage											
Backup Frequency											
Proactive Monitoring											
Analysis Tools											
Precision Repair Capabilities											
Search Capabilities											
Expert Capabilities											
Proof of Concept											



O W N Y O U R O W N D A T A

About Own

Own is the leading data platform trusted by thousands of organizations to protect and activate SaaS data to transform their businesses. Own empowers customers to ensure the availability, security and compliance of mission-critical data, while unlocking new ways to gain deeper insights faster. By partnering with some of the world's largest SaaS ecosystems such as Salesforce, ServiceNow and Microsoft Dynamics 365, Own enables customers around the world to truly own the data that powers their business.

It's their platform. It's your data. Own it.

Learn more at owndata.com