Salesforce Data Protection and Sandbox Seeding with the Druva Cloud Platform

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Data Protection Challenges:

46% The percentage of respondents that chose **loss of employee productivity** as a business impact that could result from downtime or lost data.[1]

35% The percentage of respondents that chose **loss of customer confidence** as a business impact that could result from downtime or lost data.[2]

Since Salesforce and other SaaS applications store masses of business-critical data in the cloud, one would expect customers to be extremely attentive to ensuring full and complete protection and compliance for that data. Many customers assume that their data is protected by cloud vendors; however, these vendors often protect the cloud infrastructure but not customer data. When customers do look for their data protection solutions, they focus on the impact of downtime and data loss for key applications. According to ESG research, 46% of respondents chose loss of employee productivity as a business impact that could result from application downtime or lost data while 35% chose loss of customer confidence.

Druva SaaS Data Protection and Management

Delivered as a service, Druva's cloud data protection solution for SaaS applications, the Druva Cloud Platform, simplifies backup, archiving, and compliance to reduce the cost and complexity of protecting online data, ensure regulatory compliance, and improve data visibility. With a single pane of glass for management, organizations' SaaS applications are protected without impacting end-user productivity. This ESG First Look focuses on Druva's Salesforce data protection and data management capabilities (see Figure 1).

**Figure 1. Druva's Salesforce Backup Solution Overview**

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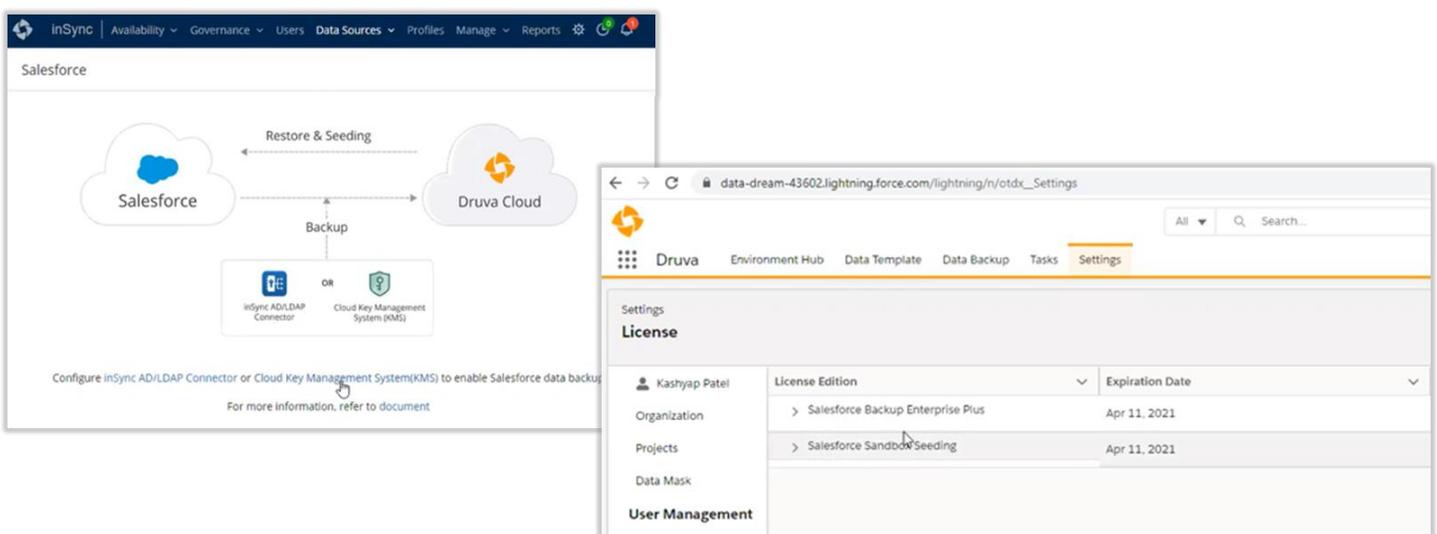
[1] Source: ESG Research Report, *Real-world SLAs and Availability Requirements*, October 2020.
[2] ibid

The key Druva Salesforce backup solution benefits include:

- **Data Protection:** Reliable, automated daily backups of Salesforce data and metadata, combined with fast, easy recovery from secure air-gapped storage, to prevent any data loss incidents.
- **Data Recovery:** Restore anything or everything, with individual record selection or query-base selection, to a backup image from any point.
- **Sandbox Seeding:** Create high-quality data-copy sets for Salesforce sandbox seeding, while reducing costs and complexity by leveraging template-driven management. Create reliable data copies to accelerate development, optimize testing, and populate sandboxes faster. Leverage data translation capabilities to simplify bulk production updates or data migrations.
- **Data Compliance:** Leverage Druva data-masking capabilities to ensure compliant sandboxes for development, test, and quality assurance teams. Leverage GDPR functionality to fulfill right to be forgotten, change, and export compliance and to handle the review of subject access requests.
- **Backup and Resource Visibility:** Monitor backup history, duration, and data success rates to ensure recoverability. Monitor Salesforce data limits, file limits, and API calls to ensure uninterrupted Salesforce operation.

Figure 2. Backup Definitions and Sandbox Seeding Summaries
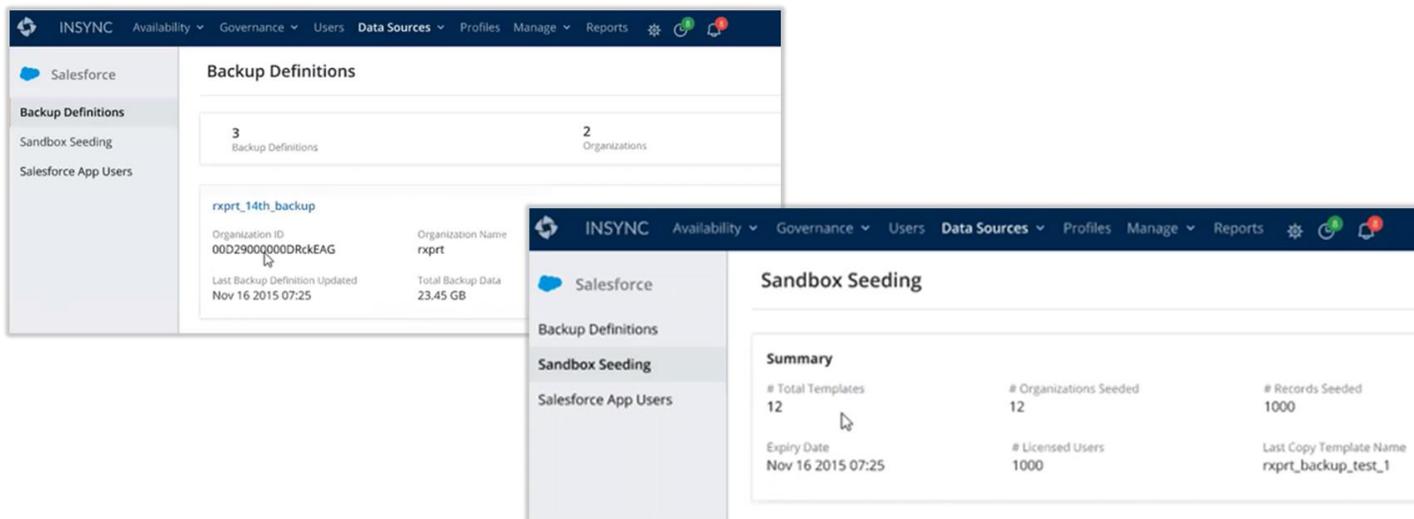
ESG Lab Demo Highlights

ESG performed a detailed evaluation of Druva's solution for Salesforce data management by participating in a solution briefing and an in-depth, hands-on demo hosted by Druva subject matter experts. The evaluation focused on highlighting the solution's data protection and copy data management capabilities, including sandboxing with data translation, data masking, and GDPR functionality.

Comprehensive Salesforce Data Protection and Sandbox Seeding

ESG started the evaluation process by exploring the data protection capabilities of Druva's solution. We connected to a Salesforce instance hosted in a Druva development lab and then navigated to the Druva application in the Salesforce Lightning user interface. From the Druva homepage, we selected the *Data Backup* tab and then clicked on the *New* tab to start the *New Backup Definition* process (see Figure 3). We created a new daily backup named *BACKUP Destination*, set the start date and time, selected a *Quarterly* full backup frequency, and set a retention time of ten years. When a backup runs, it will do an initial full backup, followed by daily incremental backups until the scheduled quarterly full backup.

The process will be repeated as long as the backup definition is active. The backup configuration is very granular and includes items such as object and field exclude lists, alerts and notifications, permissions, and metadata selection. Backup

success can be monitored from Lightning (see Figure 4) or from the external Druva UI. If a Salesforce environment becomes compromised or inaccessible due to a disaster, all data can be downloaded from the Druva cloud for complete recovery.

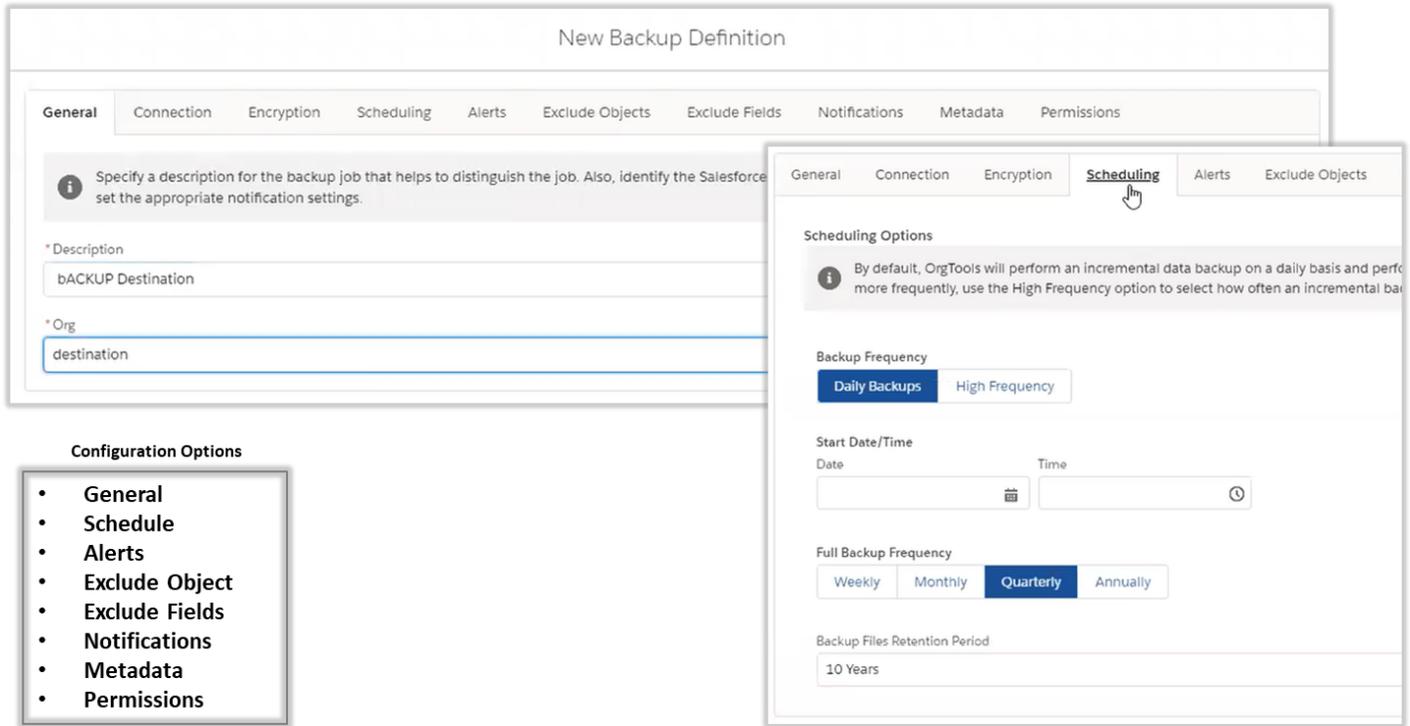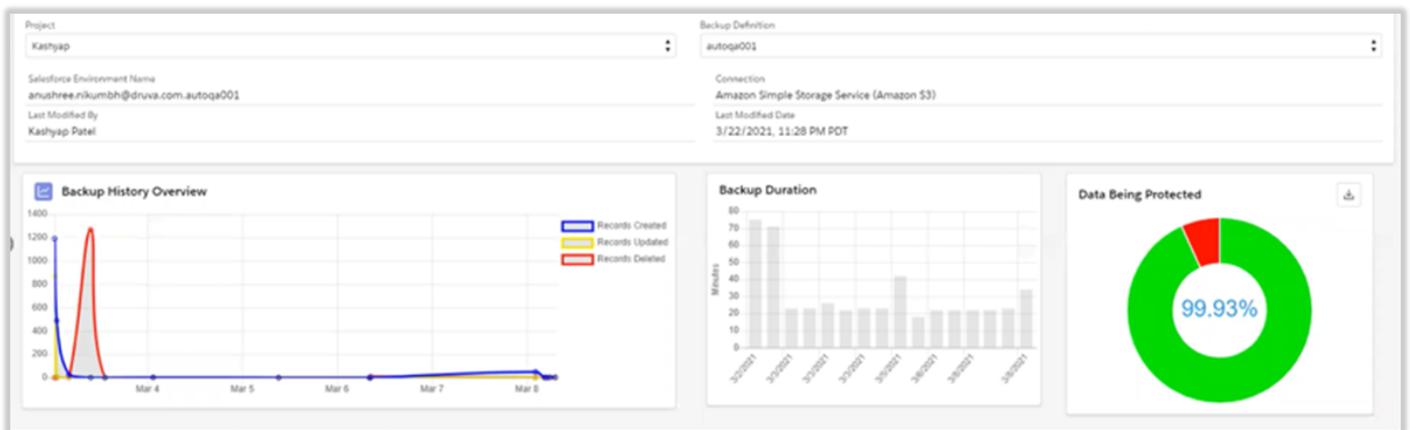## Figure 3. Backup Management Capabilities

Figure 4. Backup Status Visibility

Next, ESG explored the powerful data copy capability of Druva's solution. This data copy functionality can be leveraged to discover, sort, and arrange Salesforce data with a high degree of granularity. The *Create a Data Copy Template* process can be used to easily manage the entire copy procedure (see Figure 5). Once the data is verified, it can be used to seed a sandbox or update production data. Advanced features such as translation and data masking can be used to enhance the data copy capabilities, and the solution provides Salesforce resource utilization monitoring of data storage, file storage, and API calls so that limits or capacities will not be exceeded with copy operations.

Figure 5. Sandbox Seeding Capabilities
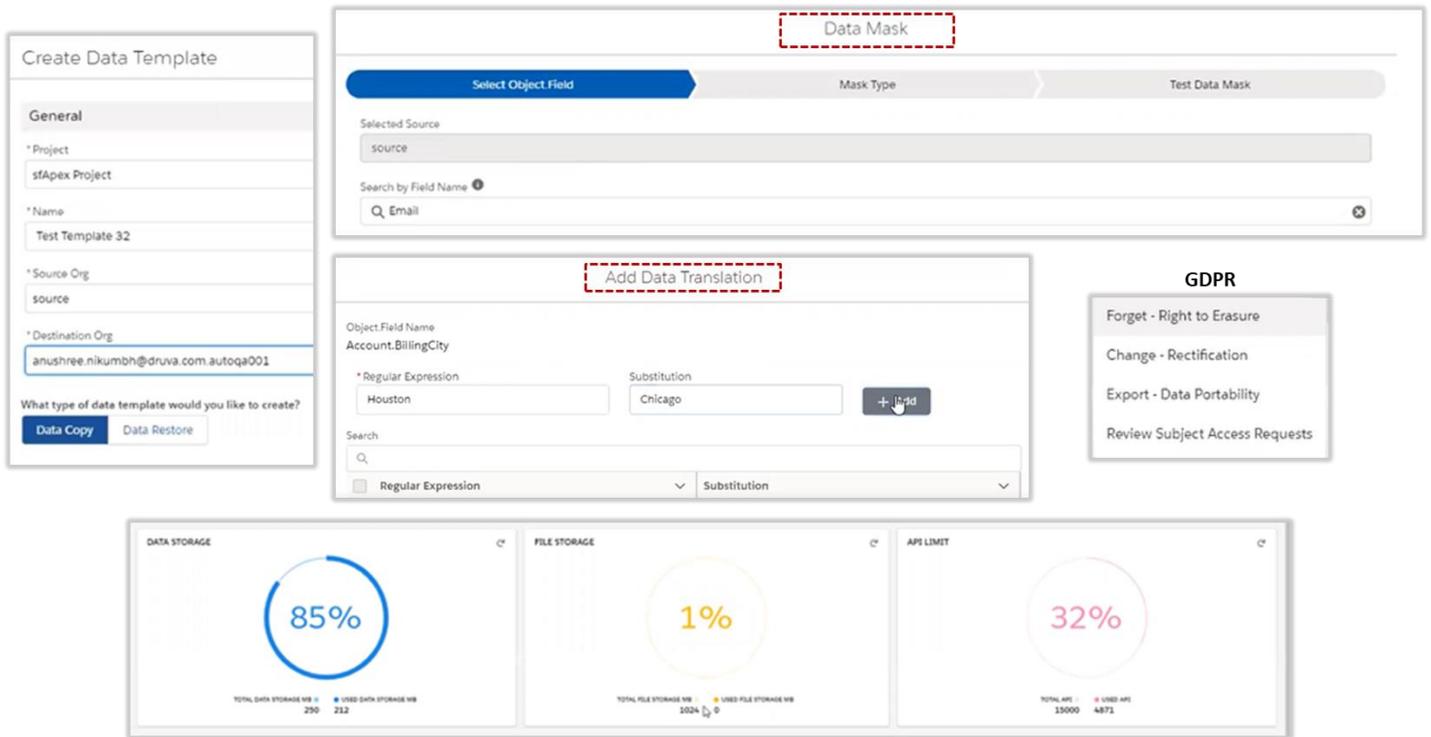
First Impressions

Salesforce is a serious business tool that is often at the forefront of digital transformation initiatives. Customers depend on it for critical customer relationship management, marketing automation, analytics, and other data that must be fully protected and compliant. Unfortunately, some customers mistake Salesforce's infrastructure SLAs for data protection SLAs, leaving their data at risk. Customers are responsible for not only protecting their Salesforce data, but also managing test data and sandboxes, which require a good understanding of Salesforce objects, fields, metadata, resource limits, and API calls. The Druva Cloud Platform can be a valuable resource to assist customers with Salesforce management.

ESG's first impression is that Druva's solution for Salesforce offers an extensive set of features and capabilities that customers can leverage to manage and automate the many data protection and data management tasks Salesforce administrators deal with on a daily basis. We were also pleased to see the air-gapped protection storage capabilities provided by Druva's cloud architecture for enhanced disaster recovery.

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