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The Data Reduction Framework for Salesforce

Manage your CRM data footprint to achieve enhanced data security and privacy law (GDPR) compliance

salesforce available on AppExchange

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Relevant data grows your business, but once it becomes obsolete, it carries hidden costs...

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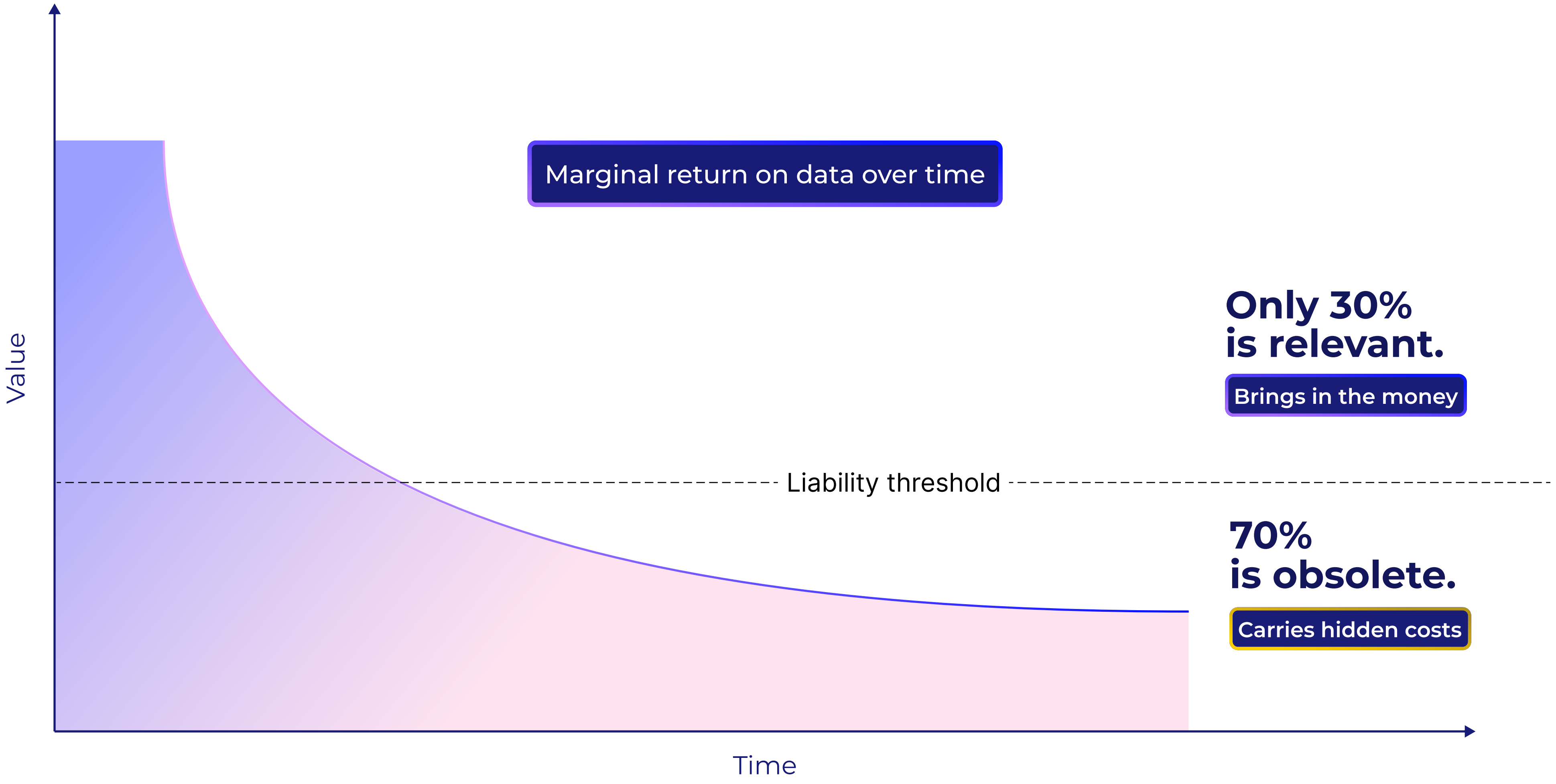

Only 30% is relevant.

Brings in the money

70% is obsolete.

Carries hidden costs

*Source: Dun&Bradstreet, "Improve the quality of your marketing, now”

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…exposing your organization to data security vulnerabilities that multiply quickly…

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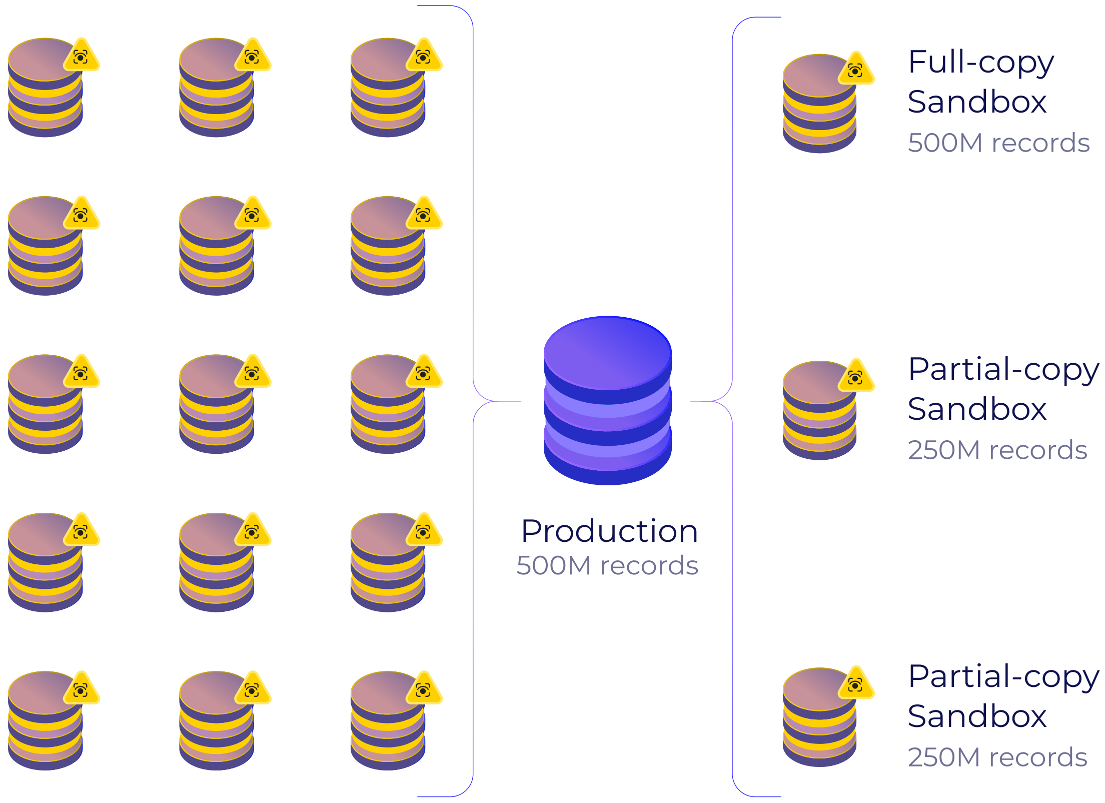

Dev Sandbox
15x1000s records

Production
500M records

Full-copy Sandbox
500M records

Partial-copy Sandbox
250M records

Partial-copy Sandbox
250M records

Each additional sandbox adds another moving part to protect

Sandboxes replicate Production data, thus increasing the total attack surface

The multiplier effect of deleting 1 record in production is 20-30x downstream

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…and your customers are becoming more conscious about how their data is being handled…

97% of customers are afraid their data is misused*

81% say trust impacts buying decisions†

* Harvard Business Review, “Customer Data: Designing for Transparency and Trust”, May 2015
† Forbes, “How to get customers to trust you?”, November 2019

…finally, privacy laws such as GDPR actually mandate the reduction of your data footprint.

Minimization Collect the minimum data needed

Retention Remove data once its purpose is accomplished

Masking Convert data to a non-identifiable state for non-production uses

As covered in GDPR under

- Articles 5, 25, 32
- Recitals 28, 39, 50, 76, 77, 83

Only by reducing obsolete data you address the underlying security, trust and compliance considerations...

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Benefits	Masking/deletion	Encryption	Archiving	Seeding
Address hidden cost of obsolete data in terms of security, compliance and storage	✓	~	~	~
Reduce vulnerabilities arising from replication of customer data in test environments	✓	~	✗	✓
Build trust by treating data in the customer's interest	✓	~	✗	~
Ensure compliance with data privacy regulations such as GDPR and HIPAA	✓	✗	✗	~

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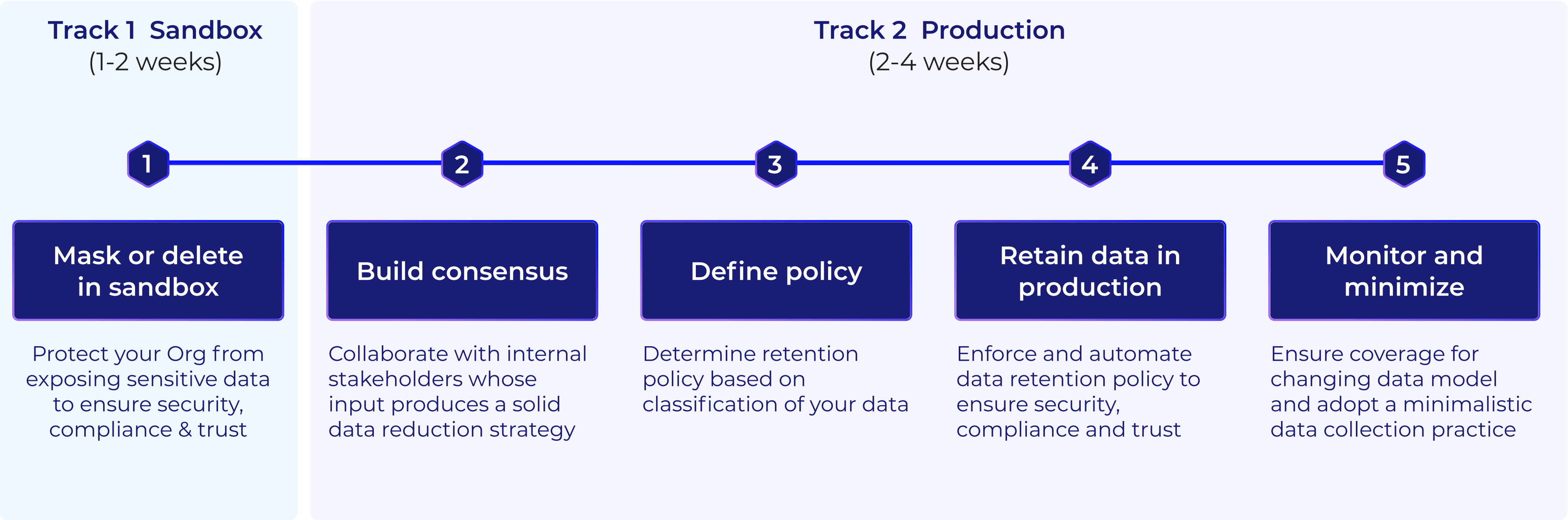
...and with a 5 step process, your time to value with data reduction can be as short as a week



Track 1 Sandbox
(1-2 weeks)

Track 2 Production
(2-4 weeks)

1. **Mask or delete in sandbox**
   Protect your Org from exposing sensitive data to ensure security, compliance & trust

2. **Build consensus**
   Collaborate with internal stakeholders whose input produces a solid data reduction strategy

3. **Define policy**
   Determine retention policy based on classification of your data

4. **Retain data in production**
   Enforce and automate data retention policy to ensure security, compliance and trust

5. **Monitor and minimize**
   Ensure coverage for changing data model and adopt a minimalistic data collection practice

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Step 1 : Mask data in sandbox

Protect your Org from exposing sensitive data to ensure security, compliance & trust

Sample Masking Policy:

Ensure that customer data is not accessible in sandbox. Remove personal and business sensitive data from sandboxes and delete/update any other unnecessary data.

Benefits	1. Mask sensitive data	2. Delete unneeded data	
Sandbox Type	Full, Partial, Developer, Developer Pro	Full and Partial	Developer and Developer Pro
Personal	Mask customer data (including user data)	Delete unstructured and related data (Chatter, emails)	Not applicable as these sandboxes have no data
Business sensitive	Mask/delete business sensitive data (including product and pricebook data)	Delete unstructured and related data (Files, Tasks)	
Other	Update setup config data such as custom settings, custom labels, and remote site settings	Delete other irrelevant data	

Step 2 : Build consensus

Collaborate with internal stakeholders whose input produces a solid data reduction strategy

- Run Salesforce data coverage tools like Cloud Compliance's Personal Data Discovery or FieldTrip to get a snapshot of the 'state of data' in your Salesforce Org.

- Share your findings and highlight the benefit of data reduction to your stakeholders (refer sample table below).

Function	**Benefit/Value Proposition**
Marketing	Respect customer communication preferences for Marketing outreach by removing obsolete data that may violate laws such as GDPR
Legal / Compliance	Comply with data privacy laws such as GDPR and reduce future risks of lawsuits arising from data breaches and spills
IT	Deliver projects faster and more securely by reducing the complexity of processing, storing and securing undead data

Step 3 : Define policy

Determine retention policy based on classification of your data

1. Classify personal and/ or sensitive data	2. Assess the typical drivers of policy	3. Define policy	
		Retention policies (for Production data)	Masking policies (for Sandbox data)
Personal	GDPR Lawful basis or Security Policies	Mask or delete	Mask
Business sensitive	Security Policy or Technology optimization	Mask or delete	Mask or delete
Other	Security Policy or Technology optimization	Delete	Delete

Step 4 : Retain in production

Enforce and automate data retention policy to ensure security, compliance and trust

Typical Retention Policy:

Identify and flag leads with no movement for 9+ months. Mask their personal data after a year and delete after another 6 months.

Action	Event criteria	Automation	Data sample
1 Maintain relevant data	9 months of no movement	N/A	Lead **Adam Johnson**
2 Report obsolete data	9+ months of no movement. Met reporting criteria	Flagged for masking	Mask customer data (including user data)
3 Mask obsolete data	12 months of no movement. Met masking criteria	Masked	Lead **Jane Doe**
4 Delete obsolete data	6 months after masking. Met deletion criteria	Deleted	Report : Leads **Leads ready for retention**

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Step 5 : Monitor & Minimize

Ensure coverage for changing data model and adopt a minimalistic data collection practice

- Monitor policy enforcement and execution
- Ensure coverage for changing data model

Screenshot

These forward-looking organizations ensured security, compliance and trust through data reduction

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Global FinTech Customer

Reducing data footprint for GDPR/CCPA compliance with Cloud Compliance

A multi-billion dollar FinTech faced fines and lawsuits due to non-compliance with GDPR/CCPA.

Our Data Retention automated retention policy enforcement, ensuring compliance and notifying business users before data deletion.

Within 4 weeks, they went live, resolving the compliance issue and preparing for their larger project.

Learn More →

NRC NORWEGIAN REFUGEE COUNCIL

Preserving trust by masking sandbox data & deleting obsolete Prod records

Discover how a non-profit achieved GDPR compliance in just 6 weeks, with our fast, cost-effective, and easy-to-maintain solution.

By automating their data masking and retention policies with us, their data security needs were met.

Read on to learn how we helped them achieve peace of mind with efficient and reliable GDPR compliance.

Learn More →

SAINT LOUIS UNIVERSITY.

Automating Salesforce storage management and GDPR compliance

Discover how SLU, with campuses in St. Louis, USA, and Madrid, Spain, tackled GDPR compliance and freed up Salesforce storage.

Find out how they reclaimed org storage with a fully automated retention policy for students on both campuses.

We delivered their complex requirements in 8 weeks.

Learn More →

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Schedule some time to learn more about protecting your Salesforce Data

Compliance made simple

Operationalize privacy compliance and data security on Salesforce with the comprehensive suite of products.

DM
salesforce
DR
PR

BOOK DEMO

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