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EBOOK

Salesforce Was Built to Be a CRM, Not a Dev Platform

Filling in the Gaps of Service

INTRODUCTION

Salesforce has skyrocketed in popularity over the last decade, and for good reason. It is a powerful service that has helped thousands of companies streamline their operations. They have expanded their services over the years, but their original function was to help their users become more organized as a CRM.

Customer Relationship Management (CRM) is a vital technological tool for companies to manage relationships and interactions with both customers and fellow team members.

Salesforce began this effort back in the 1990s. They entered the world of software development in 2008 and have grown in popularity due to their "point and click" interface that simplifies dev processes.

However, it's important to remember that Salesforce was originally designed to be a CRM which leaves a lot of room for improvement in their development environment regarding both security and functionality.

We'll look into these important aspects of the implications of Salesforce origin as a CRM:

1. Salesforce Development Inherently Affects Sensitive Data
2. Scalability and Flexibility Are Limited
3. Salesforce Metadata Requires Special Handling
4. Options for Locations of Services Are Essential
5. Downtime Is Inevitable
6. Salesforce Developer Tool Integrations Can Add to the Risk
7. A Fully Integrated DevOps + DataOps Environment Maximizes Returns

01

Salesforce Development Inherently Affects Sensitive Data

The information contained within your Salesforce environment will dictate both the regulations you might be subjected to, as well as the protective measures you need to take. These considerations can be easy to overlook.

In fact, it can even be possible to put this information into greater danger with flawed Salesforce development practices and coding errors which can expose this protected or sensitive information. Exposing or compromising this sensitive information can put critical resources out of action and put you at risk of failing to comply with regulatory guidelines.

Salesforce orgs almost universally contain sensitive or regulated data sets. Examples of this include:

- Personally identifiable information (PII)
- Customer sales data
- Financial accounts
- Business methods
- Critical intellectual property (IP)
- Internally sensitive data
- Trade secrets

HOW TO ADDRESS THIS

Knowing the dangers of inadequate DevOps processes and projects provides the ability to address these issues before they manifest as problems.

Utilizing a reliable DevOps platform allows your development team to:

- Avoid defective code that makes its way into production environments which can lead to lost records, privacy violations, compliance failures, and result in additional risk of exposure to external or internal threat actors.
- Fix poor quality code that can slow Salesforce instances and even result in downtime.
- Prevent data corruption, bad logic implementations, mis-stated results, change critical data, reset access/permissions settings needed for compliance and more.

02

Scalability and Flexibility Are Limited

> *Fantastic tool to implement CI/CD concept in Salesforce. The best part is end-to-end automated process for building, packaging, and test execution for Salesforce applications."*
>
> JASVINDER SINGH

One of the greatest advantages to a successful DevOps pipeline is the ability it affords to evolve along with the changing demands of your industry. This includes rolling out new applications and updates as well as increasing the capacity of your Salesforce environment.

However, Salesforce's development platform contains some limitations when it comes to its ability to provide these essential benefits.

The underlying Salesforce instance constrains performance and the ability to scale to higher workload levels. The available resource sets are limited even on a highly extensible Salesforce instance.

This is a result of working within the Salesforce platform. The depth of the information that can be processed is a vector of scalability—and this is limited by the availability of processing and data within your Salesforce instances.

HOW TO ADDRESS THIS

Taking your Salesforce DevOps pipeline off-platform solves this and many other potential issues. When you're tied to the Salesforce platform, any outage will cut you off from the ability to continue making progress.

Working off-platform allows you to keep working while everyone else is waiting for service to return.

Solutions are subject to the programming limitations of the Salesforce platform environment. These limitations are many, differ widely from other development platforms, and frequently result in scalability limitations versus off-platform product offerings.

03

Salesforce Metadata Requires Special Handling

The data sets contained within a Salesforce environment are varied and vast. In fact, there are even some types of data that many team members aren't going to be aware of because they aren't contained within folders in your system. Metadata lurks in the background of your Salesforce environment, describing various data sets and even connecting functions and fields.

Salesforce metadata includes:

- Permission information
- Object definitions
- Screen and page layouts
- Creation information
- Business rules
- Whitelists
- And much more

Almost every action from a screen change for a form, update of customer information, or new piece of code updates generates metadata.

This information needs to be protected and handled as carefully as other types of sensitive information to maintain proper functionality of your Salesforce environment. Faulty applications and updates that impact metadata can lead to compliance and performance issues.

HOW TO ADDRESS THIS

The complexity of Salesforce metadata necessitates consistently proper handling to avoid compromising release quality, as well as risking downtime and exposure of sensitive or protected data.

Supporting your Salesforce environment with a metadata management solution can help ensure the stability of your metadata sets. You will need to source a tool that provides unlimited metadata depth. The ability to migrate this type of information can save time and money when populating new orgs.

Automating aspects of your DevOps pipeline reducing errors seen during manual processes to guarantee stable updates and applications that won't impact existing metadata and allow you to remain in control of your Salesforce system.

04

Options for Locations of Services Are Essential

Your hosting and deployment location will have a great impact on the functionality of your development environment. Salesforce works in the cloud. This is great for a CRM but can present some challenges for specific development situations.

The needs of every business are going to be different. This is why choices are so important when it comes to location of services. Working in the cloud opens up the geographic possibilities of a team to work on a singular project. However, this is not going to be the case for everyone.

Many organizations have a strong preference due to security stances, compliance, and regulatory requirements to keep their development infrastructure as much under their control as possible. They may have made an exception for Salesforce itself with a very lengthy and arduous qualification process but cannot make an exception for the tools associated with Salesforce development.

HOW TO ADDRESS THIS

On-premises implementations—including physical servers, virtual environments, and private/hosted private clouds—are required to meet these limitations. They provide options that can address the exact needs of each company.

Regulated industries will have greater needs for total control over their environment:

- Financial institutions
- Insurance
- Healthcare
- Government/Defense

Companies and organizations in these fields need to maintain accountability in their systems, and these options are simply not available with a Salesforce-native solution.

05

Downtime Is Inevitable

Working within Salesforce—as a CRM or a dev environment—means you are subject to the accessibility issues of the platform.

Salesforce is mission critical. Most companies won't be able to complete their daily operations if the platform is down, which can severely affect revenue and operations. Lost or corrupted information has serious business consequences, including compliance failures in regulated industries.

Salesforce organization downtime can shut down the entire business or even be life-threatening for organizations with critical financial or healthcare applications that depend on Salesforce as a deployment platform.

And even though Salesforce places a great importance on preserving access and functionality, the unfortunate reality is that outages are going to happen. Salesforce has claimed an uptime of over 99.9%, they make no SLA commitment for uptime as part of their standard master services agreement.

HOW TO ADDRESS THIS

Your system's uptime, availability, and accuracy are driven by your organization's Salesforce developers and administrators. Ultimately, it's your responsibility to ensure continuous service. But even organizations with the strongest Salesforce development and management teams will have unplanned downtime due to management issues and change deployments.

Integrating an off-platform DevOps environment with a complete data backup and recovery system is the only way to ensure you can protect yourself against Salesforce system outages and quickly return to operations should a data disaster occur.

06

Salesforce Developer Tool Integrations Can Add to the Risk

One of the advantages of Salesforce's development environment is its customizability. There are a variety of developer tool integrations that can help a business to improve their DevOps pipeline, even if Salesforce itself doesn't provide the necessary tooling to do so.

And while this option can optimize your pipeline when reliable and secure tools are used, it can also create vulnerabilities if the integrations either aren't properly performed or unsatisfactorily sourced.

Secondary DevOps tools such as testing services can have bad interactions with development process tools. A third-party service that becomes compromised can open the entirety of your Salesforce environment to problems.

These integrations are often seen as an add-on. However, every integration you use to support proper functionality within your Salesforce environment needs to have a high level of intentionality and focus.

HOW TO ADDRESS THIS

Your developer tools and process systems need to have secure communication. These aspects need to work together seamlessly to not only provide the intended services, but also maintain proper levels of data security.

Salesforce leaves these considerations up individual Salesforce orgs to put together their own environment. This leads to errors in both sourcing and execution. However, these integrations are essential to creating a streamlined and optimized DevOps pipeline.

Being intentional with the platform or provider you use to fill in these gaps of service will protect your system from exposing data and improperly configured integrations.

07

A Fully Integrated DevOps + DataOps Environment Maximizes Returns

The Salesforce environment was designed to organize projects and records to better manage your customer relationships and operations. It is a powerful CRM that has afforded great services to their clients and customers.

But relying on third-party vendors and integrated tools creates the potential for wasted investments, inefficient processes, and unsecured environments. Creating a patchwork of tools from different venders can result in gaps in services, tools that don't integrate well with each other, and the potential for security vulnerabilities.

Utilizing a singular platform and environment to host and operate all of your DevOps functions offers guaranteed cross functionality and reliable returns.

HOW TO ADDRESS THIS

Combining the efforts of DevOps and DataOps into a singular environment operationalizes backups and automation into a unified pipeline. This saves time in development, helps you get back up and running more quickly after an outage, and optimizes your DevOps processes while reducing risks and saving money.

Automation is utilized to replace time-consuming manual, error-prone steps with speedy and safe deployments.

An integrated DevOps and DataOps platform will enable you to put both development and backup/restore tasks into a seamless unified pipeline and automate the entire process from end to end.

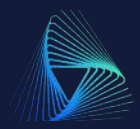
CONCLUSION

Salesforce has become a leader in the industry for its CRM platform. The development platform has also gained popularity, but it doesn't offer many of the essential tools dev teams need to adequately produce securely applications and updates.

This lack of adequacy comes from the fact that Salesforce was originally designed as a CRM and not a dev platform. The development environment is an add-on that requires special attention in order to accomplish the goals of a DevOps team.

The good news is that there are many tools and services available to fill in these performance gaps. And the best way to address these needs is through a complete DevSecOps platform that provides everything you need—from backup and restore functionality to automated security and quality checks.

Being intentional about where you choose to host your dev environment can bolster your data security efforts and provide the oversight regulated industries need to remain compliant.



ABOUT autorabit

application development and release process. This enables continuous integration and delivery by providing fast, simple, and secure end-to-end automation across all Salesforce implementations. We help enterprises achieve higher release velocity and faster time-to-market.

AutoRABIT provides automated Metadata Deployment, Version Controlling, Advanced Data Loading, Orgs and Sandbox management, Test Automation, and Reporting. Our services complement and extend Salesforce DX. AutoRABIT Vault—our backup and recovery solution—streamlines Salesforce data, simplifies data backup challenges, offers disaster recovery, and endpoint data protection on the Cloud. CodeScan provides full visibility into code health from the first line written through final deployment into production.

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