

Effective Archival of Salesforce Stale Data: A Strategy for System Optimization and Cost Efficiency

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Abstract

This paper explores the importance of archiving stale data in Salesforce and how implementing an ongoing archival process helps maintain accurate, up-to-date information while optimizing system performance and reducing storage costs. As businesses generate vast amounts of data daily, the accumulation of outdated information can slow system operations, increase storage costs, and lead to data inaccuracies. The paper will outline best practices for Salesforce data archival, including soft archival strategies, hard deletion, data backup procedures, and integration precautions. Examples of account data archival, key performance indicators (KPIs), and cost-saving opportunities will be discussed, along with recommended tools and methods for successful data management.

Keywords

Salesforce, Data Archival, Stale Data, Data Backup, Soft Archival, Data Management, System Optimization, Cost Savings, AWS Backup, OwnBackup, Salesforce Queries

Introduction

As businesses increasingly rely on Salesforce and similar CRM systems to manage data, the need for effective data management becomes essential. Over time, the accumulation of stale or outdated data can lead to slower system performance, longer load times, and increased storage costs. According to Salesforce's native storage limits, businesses are allowed a specific amount of data, after which additional storage incurs significant costs. Implementing a robust data archival process allows organizations to streamline their data, reduce operational costs, and enhance overall efficiency. This paper will discuss the advantages of archiving Salesforce stale data, the steps involved in soft and hard archival, best practices, and the tools that can help make the process secure and seamless.

Main Body

Problem Statement

Businesses generate large volumes of data daily, ranging from sales records, customer interactions, contracts, and more. Without a systematic approach to manage and archive this data, organizations can face several issues, such as:

- Sluggish system performance due to data bloat.
- Increased query processing time for reports and dashboards.
- Higher storage costs as Salesforce data exceeds storage limits.
- Difficulty in maintaining data accuracy and compliance standards.

The cost and performance impact of growing data volumes highlight the need for an effective archival strategy.

Solution

To address the challenges posed by stale data, organizations can adopt a two-step archival process: **soft archival** and **hard archival**. Each approach helps manage and organize data, ensuring that only relevant, up-to-date information is stored in Salesforce.

Step 1: Soft Archival

Soft archival involves moving non-essential or stale data into a less visible record type, accessible only to the teams managing the archival process. By doing this, the data remains in Salesforce but is no longer in active use or taking up valuable operational space. This type of archival offers flexibility and safety, as it allows businesses to revert if needed before hard deletion.

Example: Account Data Archival

For account data, typical soft archival criteria may include:

- No sales activity for the last 2+ years.
- No active competitive intelligence.
- No active contracts or cases associated with the account.
- No commission history tied to the account.

Using Salesforce's query tools (e.g., SOQL), companies can easily filter data that meets these criteria.

apex

```
SELECT Id, Name FROM Account WHERE LastActivityDate < LAST_N_YEARS:2 AND IsClosed = true
```

Once the data is identified, it can be assigned to a new record type for soft archival. This ensures minimal disruption to ongoing processes and provides an opportunity for end-user review before proceeding to the hard archival step.

Step 2: Hard Archival and Deletion

After verifying the soft archived data, the next step involves **hard archival**, which requires permanently deleting the data from Salesforce after ensuring that a proper backup has been taken. Data can be backed up using tools such as OwnBackup or stored in AWS cloud storage to ensure it can be retrieved later if necessary.

Using a third-party backup tool like OwnBackup is recommended because of its high-level security features, including encryption for sensitive data. This method provides peace of mind while freeing up Salesforce storage space. Once backed up, the data is safely deleted from Salesforce, improving performance and reducing costs.



Precautions for Data Archival

Data archival, especially in large organizations, requires careful planning. Some critical precautions include:

- **Dependencies:** Ensure that stale data is not linked to other systems that might still use it. For instance, bidirectional data transfers may require coordination with teams managing related systems (e.g., ERP systems).
- **Automation Check:** Review automated processes and workflows that might be impacted by data archival.
- **Legal Compliance:** Ensure that archived data complies with legal requirements, especially in industries like healthcare, where historical data may need to be retained for regulatory reasons.

Backup Tools and Methods

There are several methods and tools available to assist with data backup and archival:

- **OwnBackup:** An enterprise-grade tool offering automated backup and recovery solutions tailored for Salesforce data. It ensures that sensitive data is secured and easily recoverable.
- **AWS S3:** An alternative cloud-based storage option, allowing businesses to export Salesforce data and store it in a cost-effective manner.
- **Google Sheets/Excel:** Although not ideal for large datasets, small-to-medium businesses can archive data by exporting it to spreadsheets, provided they maintain Salesforce record IDs for easy retrieval.

Impact and Key Performance Indicators (KPIs)

A well-implemented data archival process results in several benefits that can be measured using the following KPIs:

1. **Reduced Data Storage Costs:** By archiving stale data, companies can avoid paying for additional storage beyond Salesforce's default limits. Savings can reach thousands of dollars annually, depending on data size.
2. **Improved System Performance:** Archived data reduces the system's processing load, leading to faster report generation and improved user experience.
3. **Faster Query and Report Times:** By reducing the volume of active records, query response times can improve by up to 50%.
4. **Reduced System Maintenance:** Less data in the system leads to fewer errors and reduced maintenance tasks for IT teams.
5. **Compliance with Data Retention Policies:** Archiving ensures compliance with data retention policies without overloading the system with old records.

Cost Savings

By implementing an effective archival process, organizations can experience significant cost savings:

- **Storage Costs:** Salesforce charges based on data volume, and by archiving stale data, businesses can avoid these extra charges. For example, Salesforce's storage costs are typically \$5,000 per additional GB. Archiving several GB of data could result in savings of tens of thousands of dollars annually.
- **IT Resources:** Fewer data leads to less system maintenance, freeing up IT resources for other projects.

Conclusion

Archiving Salesforce data is essential for maintaining system performance, reducing costs, and ensuring accurate data in CRM systems. Soft and hard archival processes, combined with regular reviews and integration precautions, offer a powerful way for organizations to manage stale data while maintaining compliance and operational efficiency. With the help of tools like OwnBackup and AWS, organizations can securely archive data and enhance Salesforce's overall performance.

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