Coastal | Own from Salesforce

Salesforce Data Roadmap: Optimizing Data at Every Stage in its Journey

Discover How Effective Data Management Can Support Your AI Initiatives

As Salesforce teams manage more data than ever before, the need for a Data Lifecycle Management (DLM) plan and strategic roadmap has become increasingly pressing. DLM involves overseeing data throughout its entire lifecycle—from creation and storage to obsolescence and deletion—through policies and procedures that ensure data availability, integrity, and security.

By partnering with experts like Own and Coastal, organizations can develop a comprehensive DLM strategy to not only address common data challenges such as data bloat, performance degradation, and compliance risks, but also fully maximize the value of their Salesforce investment.

Let's dive in.

How Weak Data Lifecycle Management Stifles Business Growth

Ignoring data lifecycle management doesn't just contribute to data bloat—it can directly impact business growth. When data isn't properly managed, inefficiencies and inconsistencies can creep into daily operations, leading to poor decision-making, slower response times, and missed opportunities. Over time, this lack of control over data can make it difficult to scale.

Here are a few of the risks that come with not managing your data efficiently:

Data Integrity Issues

Adding data to the system without proper checks to ensure data quality can compromise data integrity.

Data Utility Issues

Processing and activating data in real time can be a struggle, limiting the usefulness of the data.

Productivity Loss

Data bloat degrades performance, making the platform slower and less efficient for users.

Increased Storage Costs

Retaining data that's no longer needed in production inflates storage costs and hampers user productivity.

Manual Archiving Challenges

Manual processes are not scalable and increase the risk of accidentally archiving important data.

Compliance Risks

Retaining data for inappropriate durations violates governance policies and regulations, with the average cost of a non-compliance event being around $5.9 million.

Managing Data Silos

Your business has tons of customer data—but it's scattered across different systems, making it difficult to understand your customers and make informed decisions that drive growth.

As you consider these risks, keep in mind two common misconceptions or oversights regarding DLM.

First, a piecemeal DLM strategy can be just as risky as having no strategy at all.

Enterprises often fail to define a cohesive data lifecycle management process, instead piecing together solutions and approaches as needed. This results in ad hoc, amorphous systems that are difficult to learn, optimize, or scale effectively. Without a unified approach, data becomes fragmented, leading to inconsistencies, gaps in data protection, and a higher likelihood of compliance breaches.

Second, DLM isn't just something large enterprises need to worry about.

As your business grows, the volume of data you handle increases exponentially, and without a clear strategy in place, this can quickly lead to inefficiencies, compliance risks, and operational challenges. Small and mid-sized companies often assume they can manage their data on an ad hoc basis, but this approach becomes unsustainable as they scale. By treating data as a valuable asset from the start, even smaller organizations can optimize operations, reduce costs, deliver deeper customer value, and make more informed decisions that fuel long-term success.

A proactive, unified approach to your data management is essential for overcoming these barriers and building a foundation for sustainable success. How you architect and define your data governance plays a critical role in **every stage** of the data lifecycle management process.

Understanding the Key Stages of Lifecycle Management

While there might be slight variations in how different organizations define the stages of the data lifecycle, the process is generally broken down into four key steps: **storage, usage, archival, and destruction**. These stages provide a comprehensive framework for managing data from creation to disposal, ensuring it's effectively protected, utilized, and optimized throughout its lifecycle.

Let’s look closer at each stage of the data lifecycle, how these stages directly influence your AI initiatives, and provide some examples of how Own and Coastal can help.

Stage #1 Storage

Build a Resilient Foundation by Securely Storing Mission-Critical Data

In the initial stage, data is created and stored in a live production environment. This data needs to be reliable and readily accessible for regular business operations. Ensuring quick recovery from data loss or corruption minimizes downtime and safeguards business continuity. It's critical at this stage to also ensure that your data types are appropriate and business rule validation is applied as early as possible so your data is valuable as soon as it's created.

There are multiple solutions and ways you can work with your data, including where you choose to store and access that data, but the trick is knowing when to use these tools. **Coastal** has experience with best-in-breed solutions and helps navigate how to get the most out of your investment in these solutions.

Own plays a vital role in the "data storage" phase by ensuring the integrity of your Salesforce data as it's generated and stored. They provide comprehensive backup and restoration capabilities, allowing you to safeguard everything important to your organization, including data, metadata, files, attachments, managed package data, and sandboxes.

AI Consideration

Ensuring that all historical and mission-critical data is backed up enables enterprises to train AI models on comprehensive datasets, driving more valuable insights.

Stage #2 Usage

Ensure the Right Data is Available (and De-Risked) for the Right Users

As data transitions to the "Usage" stage, it plays a critical role in day-to-day operations. Ensuring users have the right access to relevant data is crucial for productivity and leveraging the data's full potential for automation and AI applications. This means you're following best practices like the "principle of least privilege," as well as periodic enrichment of data, to ensure the value of data doesn't degrade over time. Often, the longer data sits unused or untouched, the less valuable it becomes.

AI Consideration

Without the proper controls, data bottlenecks and inefficient access policies can stifle progress, create security risks, and limit the full potential of automation and AI efforts.

Real-World Example

Baptist Health

Baptist Health Jacksonville sought to evolve with changing consumer service standards and chose Salesforce for their transformation, but faced challenges integrating it with their existing EMR systems during a major consolidation. Coastal stepped in and developed an actionable technology and data roadmap for Health Cloud, Marketing Cloud, Data Cloud, MuleSoft, and Analytics implementation, all guided by KPIs. This partnership improved efficiency across marketing, physician liaison, and contact center teams, leading to a 200% increase in primary care follow-up conversions enhancing the patient experience and ROI for Baptist Health.

Stage #3 Archival

Optimize Your Salesforce Org and Ensure Compliance by Archiving Data

As data ages, its value shifts, making it suitable for archival rather than active use. By archiving data, you reduce data bloat, lower storage costs, and maintain compliance, ensuring that the data remains accessible when needed without impacting active operations. Don't just consider an archival solution without also identifying the circumstances and processes by which you can "reactivate" your data as needed.

AI Consideration

Archived data can still fuel AI initiatives, such as sales forecasting or trend analysis while keeping your Salesforce org optimized.

Real-World Example

When Doug Baker, Assistant Director of CRM Systems, joined UTSA, he noticed that Salesforce data objects were growing about 10% per month, but the team couldn't identify what was causing this.

"By the time we actually had a chance to research what the issue was, we were at about 86% capacity of our total amount of storage in Salesforce," says Doug.

Once they realized that one object was taking up 60% of their storage, they knew they needed to find a way to either back up or archive the data from that object. Using Own's Archive solution, the UTSA team only took 14 days to shrink their total storage size by almost 40%.

Stage #4 Destruction

Purge Data Once It No Longer Serves the Business

Data that no longer serves any business purpose should be permanently deleted to keep archives lean, reduce compliance risks, and ensure that only relevant data remains. Data archiving plays a crucial role in the "data destruction" phase by ensuring that your archives remain lean and manageable. It regularly deletes obsolete data that no longer serves any business purpose, helping to keep your data storage efficient.

AI Consideration

Purging irrelevant data reduces noise in datasets, optimizing AI models for more accurate and effective machine learning applications.

Five Steps for a Successful DLM Strategy

Now that you understand the stages of your data's lifecycle and why each is important, how do you start putting your DLM strategy together? Here are a few steps to help you define and implement a data lifecycle management strategy that can help you grow efficiently.

1. Define a governance framework

Does your organization have robust policies and procedures for governing data management? When was the last time they were reviewed for utility and appropriate application across the data program? Make sure your governance framework matches your business in practice and the data management program you hope to implement. Include roles, responsibilities, and compliance requirements.

2. Identify needs

Reviewing the types of data collected, sources, and the purposes for which it will be used is a crucial foundational step that informs how you update your data strategy. Conduct an inventory and classification exercise to categorize data based on its value, sensitivity, and regulatory requirements.

3. Deploy supportive tools

Investing in a data management platform that holistically facilitates data storage, processing, analysis, and compliance monitoring can determine the success of your data lifecycle management program. Seek out a solution that stores data securely, maximizes the utility of both in-use and archived data, proactively preserves data integrity while maintaining access, and keeps storage lean and cost-effective by deleting obsolete data. Coastal can help you navigate the tools and Salesforce ecosystem solution partners (like Own) to leverage.

4. Monitor and audit

Monitor data usage, access patterns, and compliance with well-defined and frequently updated management policies and tools that track changes and alert IT teams to anomalies before they become full-blown crises. Conducting occasional audits and reviews can also help address any compliance issues and ensure appropriate resources are allocated to tools, personnel, and other data management systems.

5. Evaluate and improve

Create a culture of data stewardship and accountability by offering frequent training and communicating data policies as they evolve. Get team input on the effectiveness of data lifecycle management practices and tools. Incorporate lessons and refine and enhance your framework over time.

Build a Lean and Agile Salesforce Org that Scales with Own and Coastal

Optimizing your data lifecycle is not just about managing data—it's about unlocking its full potential to drive business innovation, ensure compliance, and mitigate risks. By strategically implementing automated solutions at each stage of the lifecycle, Salesforce teams can empower their organizations to make data-driven decisions confidently. Now is the time to harness your data's value and position your organization for sustained growth in the digital age.

Unlock the full potential of your Salesforce data with Own and Coastal. Start by aligning technology and stakeholders with Coastal's **True North Roadmap**—a strategic plan designed to drive meaningful business outcomes. Then, dive deeper into how Own's **lifecycle management solution** optimizes your Salesforce data at every stage of its lifecycle.

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ABOUT OWN

Own is the clear choice for SaaS data protection and activation, trusted by thousands of organizations to ensure the availability, security, and compliance of mission-critical data, while unlocking new ways to gain deeper insights faster. Own ensures data resiliency and empowers organizations to bring historical context to life for predictive insights and inspiration. 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 their data and transform their business.

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

Learn more at **owndata.com**

ABOUT COASTAL

We don't just implement technology—we make sure it delivers value for your business. With years of Salesforce expertise, Coastal delivers strategic guidance that directly ties Salesforce capabilities to your business goals. Whether you're optimizing current tools or integrating new ones, we help you get real results.

Learn more at **coastal.us**