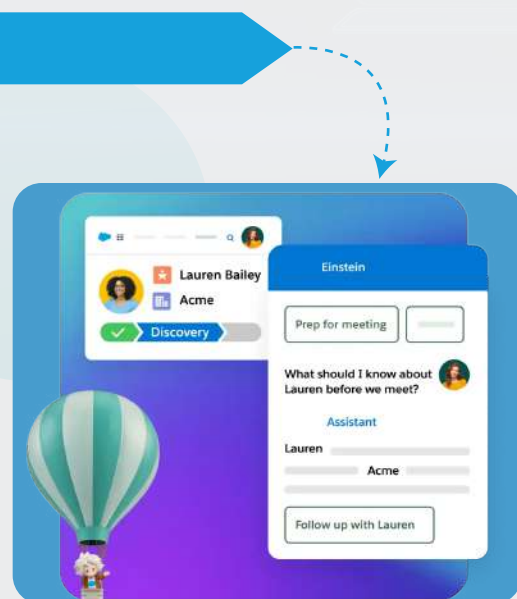


Trust by Design: Enabling Compliant and Resilient Data Operations in Salesforce OwnBackup

Technical Paper



Executive Summary

Digital transformations have empowered businesses in profound ways, but they also come with threats. For that reason, governments have created regulations for data security, privacy, integrity, and governance. Businesses impacted by these regulations face dual concerns: they need their digital transformation to drive innovation, but they must maintain strict compliance with evolving regulatory actions. Salesforce has become a major operational backbone of these businesses.

The tools made available in Salesforce power everything from customer engagement to analytics. As a result, a lot of data goes through the software. When that data is subject to regulatory oversight, a unique challenge is presented to the companies that rely on this tool.



This whitepaper will explore how Agilisium, in partnership with Salesforce OwnBackup, turns the burden of regulatory compliance into a strategic advantage. By embedding data resilience, governance, and recoverability capabilities directly into Salesforce, it's easy to meet the requirements of 21 CFR Part 11, GxP, HIPAA, and GDPR while still using the full force of Salesforce to accelerate business operations.

The paper will go beyond traditional backup and recovery. It will discuss how compliance overhead can be reduced while organizational trust is increased through the use of properly architected data protection.

The Critical Intersection of Data and Compliance

Salesforce as a Business-Critical System

Though it may have started as a simple CRM, Salesforce has morphed into a business-critical system. Today's Salesforce environments contain a wealth of data, including:

- Customer interaction histories that influence regulatory reporting
- Compliance documentation and approval workflows
- Product tracking and traceability data
- Quality management processes and deviation records
- Business intelligence that drives strategic decisions

This means that Salesforce is no longer just a tool used by a single department. Instead, it's a system of record for enterprises. Like any system of record, it must adhere to the validation, control, and recoverability standards that other regulated systems do.

The Compliance Challenge

Businesses in regulated industries have stringent frameworks that they must adhere to. Each requires demonstrable control over data. The exact regulations depend on jurisdiction and industry:

Life Sciences:

21 CFR Part 11 requires businesses to keep audit trails, validate their systems, and control who can access electronic records.

Healthcare:

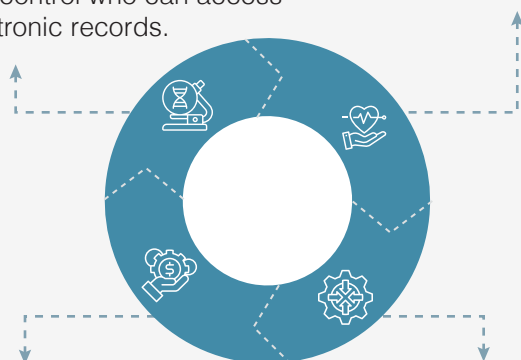
HIPAA requires protection, availability, and integrity safeguards for PHI

Financial Services:

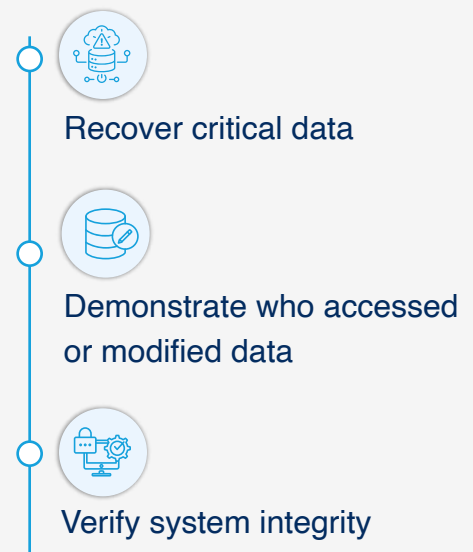
SOX, FINRA, and other regulations demand data integrity and traceability

Cross-Industry:

Europe's GDPR and similar privacy regulations in other locales require data governance throughout the lifecycle of the data.



Though each is unique, there are similarities. Each of them requires organizations to prove they can:



They must do this with minimal disruption to operational continuity.

The Cost of Data Incidents in Regulated

Environments: In regulated Salesforce environments, data issues are far worse than temporary inconveniences. The consequences can be dire:

- Potential regulatory violations and associated penalties
- Compromised decision-making because of incomplete records
- Delayed product releases from lost validation evidence
- Extended downtime during audits or inspections
- Erosion of trust with regulators, customers, and stakeholders

Businesses working in these environments must treat data protection and compliance as a business imperative, taking a proactive approach to ensure compliance.



Reframing Compliance as a Strategic Enabler

Traditionally, businesses have treated regulatory requirements as constraints, slowing innovation and impeding business processes. This whitepaper proposes a different perspective on compliance: Properly implemented compliance capabilities, by establishing trust, reducing incidents, and streamlining verification, can serve to accelerate those processes instead.

Transforming Regulatory Requirements into Operational Advantages



Audit Trails and Accountability: Manually documenting changes creates an administrative burden and includes the possibility of human error. Automating the capture of these changes, including user context, allows for effortless compliance.



System Validation: Traditional validation involves slow and resource-intensive processes that delay implementation. With automated test data provisioning and a consistent environment, the validation process can be streamlined.



Data Integrity: Data reconciliation and verification processes can be time-consuming but are required to ensure that the data is accurate. Robust backup and recovery solutions enable accurate and compliant data.



Recovery Capabilities: When data incidents do happen, there can be a long period of downtime as teams work to restore compliance. By implementing rapid, precise restoration tools, businesses can minimize this downtime.



Access Controls: Access permission structures can be complex, creating administrative overhead and potential security gaps. Role-appropriate data access protects sensitive information without disrupting efficient workflows.

The OwnBackup Advantage in Regulated Environments

All these improvements are easily implemented with Salesforce OwnBackup's capabilities. The tool is designed to address the regulatory challenges in Salesforce:



Immutable, Time-Stamped Backups:

Creating validation checkpoints that conform to 21 CFR Part 11 and HIPAA requirements



Comprehensive Change Tracking:

Documenting who made changes to the Salesforce instance and when they made them activities.



Granular Recovery Options:

Enabling restoration of specific records, fields, or relationships without disruption to the rest of the data.



Sandbox Seeding with Data Masking:

Accelerating testing and validation while protecting sensitive information.



Role-Based Access Controls:

Ensuring appropriate separation of duties for backup and recovery operations.

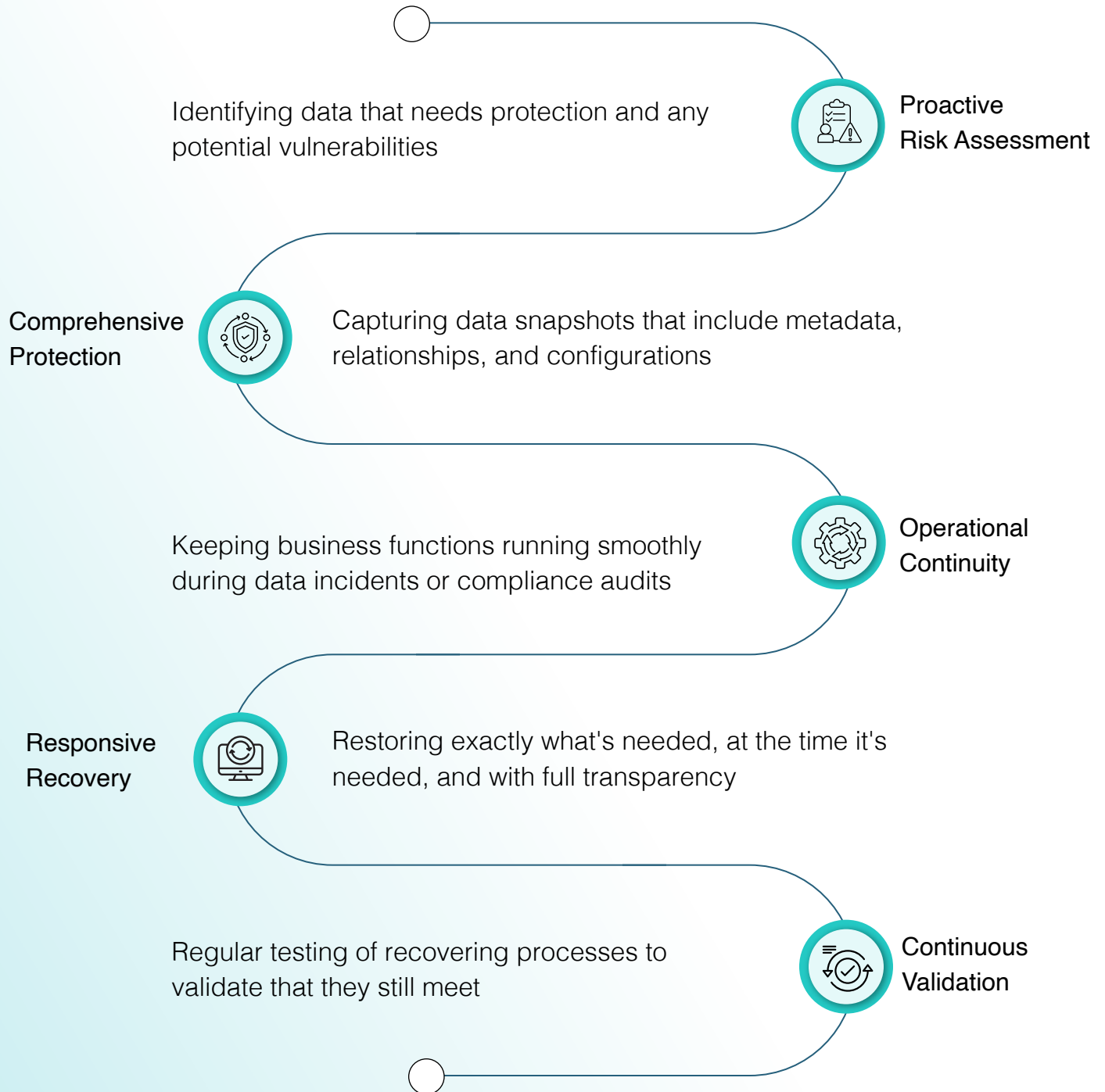


Automated Recovery Testing:

Validating restore processes to ensure they meet recovery time objectives. These features can remove many of the manual documentation processes involved in compliance, creating an operational reality that proves control without impacting business activities.

Strengthening Data Resilience for Regulated Operations

The Evolution from Backup to Data Resilience Traditional approaches to backup are simple: they just create copies of data. Data resilience goes further; it covers the entire lifecycle of the data:



Compliance requirements. This is a holistic approach that balances the needs of regulatory compliance with those of advancing core business goals.

Capabilities That Enable Compliant Operations

Salesforce OwnBackup includes features that are specifically designed to address the compliance needs of regulated environments:

Granular Recovery :

With data recovery down to the field and record level, businesses can:

- Correct errors without disrupting valid data
- Recover from integration issues that affect only specific objects
- Rollback changes that impact compliance documentation
- Provide point-in-time references for audit inquiries

Secure Test Environment

Provisioning: Testing sandboxes can be created with data masking to enable:

- Creation of accurate test environments without exposing sensitive data
- Faster validation cycles by eliminating manual data setup
- Consistent testing across development phases
- Reduction in effort required to document compliance

Audit-Ready Logs and

Documentation: Comprehensive logs and reports provide:

- Audit-ready evidence for regulatory inspections
- Clear documentation of incident management procedures
- Proof of compliance with internal SOPs
- Full traceability from backup to restoration

Policy-Aligned Backup

Schedules: Configurable backup policies ensure:

- Alignment with internal validation checkpoints
- Optimal backup frequency based on data sensitivity
- Compliance with minimum retention requirements
- Validation of backup success and integrity

IT and Platform Teams:

- Faster incident response with less manual effort
- Reduced risk during system changes
- Clear procedures for handling issues with data
- Decreased downtime during the recovery process

For Compliance and Quality Assurance Teams:

- History of system changes ready to document
- Simplified evidence collection for audits
- Validation of data integrity controls
- Demonstration of alignment with regulations

For Business and Operations Teams:

- Confidence in system availability and continuity
- Fewer interruptions during compliance activities
- Improved data quality for decision-making
- Faster resolution of data discrepancies

Cross-Functional Value Delivery:

By implementing a data resilience strategy, Salesforce OwnBackup delivers value to all business departments:

Agilisium Business Impact: Quantifiable Results from the Field

Agilisium has consistently delivered measurable business value through strategic Salesforce implementations, tailored for complex enterprise and life sciences environments. Below are six real-world use cases where Agilisium's Salesforce solutions have driven transformation across service operations, provider programs, patient journeys, and HCP engagement.

1. Accelerated Case Resolution with Einstein AI and Service Cloud

Challenge: _____

Manual case classification, disjointed knowledge access, and subjective triage decisions were delaying resolution and eroding customer satisfaction.

Solution: _____

Integrated Salesforce Service Cloud with Einstein AI to automate case triage, surface intelligent knowledge recommendations, and streamline agent workflows.

Business Impact: _____

26%

reduction in average case handling time

35%

faster response and resolution rates

Accuracy gains through
AI-driven knowledge recommendations

30%

Agent productivity improved

2. Automated Rebate Management for Compliance and Speed

Challenge: _____

Manual rebate workflows caused processing delays, high error rates, and compliance exposure.

Solution: _____

Developed an end-to-end rebate automation system using Salesforce Sites, APEX, Flows, and Visualforce—streamlining enrollment, validation, and payment cycles.

Business Impact: _____

60%

faster processing—cut time from 15 to 5 days

90%

reduction in manual errors

40%

boost in Sales & Ops team productivity

Seamless policy adherence through automated approval workflows

3. Integrated Patient Journey for Faster Time-to-Therapy

Challenge: _____

Fragmented CRM systems and touchpoints limited visibility and delayed therapy initiation.

Solution: _____

Unified patient engagement via Salesforce Sales Cloud, Service Cloud, and Einstein Analytics—empowering 2,500+ agents with a 360° patient view.



18-day reduction
in patient
time-to-therapy



Enhanced care
delivery for **2,500+**
service agents



Streamlined
engagement across
patient support
channels

4. AI-Led Support Transformation with Einstein Bots and Omni-Channel Routing

Challenge: _____

Long resolution cycles, poor FCR, and sluggish social response times impacted support KPIs.

Solution: _____

Deployed AI-powered case management, Einstein Bots, and enhanced omni-channel routing for proactive and efficient customer service.

Business Impact: _____

30%

faster resolution time

94%

CSAT
(25% improvement)

40%

productivity gain -
up to 28 cases/
day per agent

80%

First Contact
Resolution (FCR) -
a 20% increase

5. Compliant HCP Engagement with Centralized Preference Management

Challenge: _____

Disparate opt-in/out tracking created regulatory risk and fragmented HCP communication.

Solution: _____

Built a global Preference Center using Salesforce Marketing Cloud, enabling real-time consent synchronization and compliant, personalized outreach.

Business Impact:



20%

improvement in subscription
management efficiency



25%

drop in duplicate
submissions



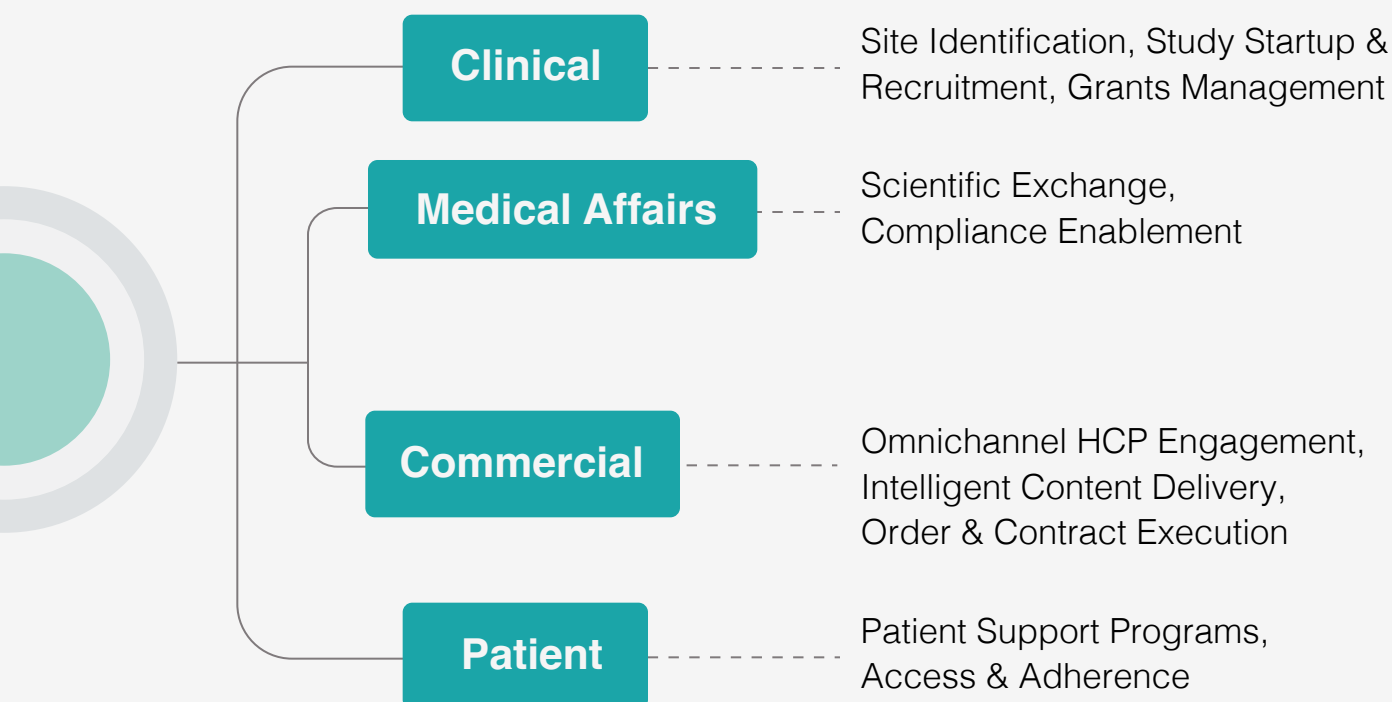
40%

faster data sync
across systems

Purpose-Built for the Life Sciences Value Chain

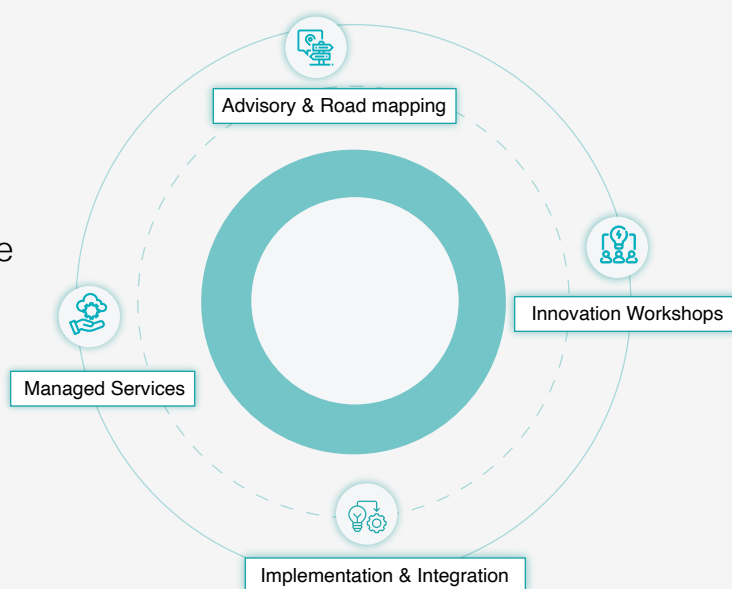
Agilisium helps life sciences enterprises harness the full potential of Salesforce across the clinical-to-commercial continuum. With domain-specific accelerators, enabled resilience, and compliance-first engineering, we modernize operations, safeguard data integrity, and drive measurable impact at scale.

Across the Life Sciences Value Chain

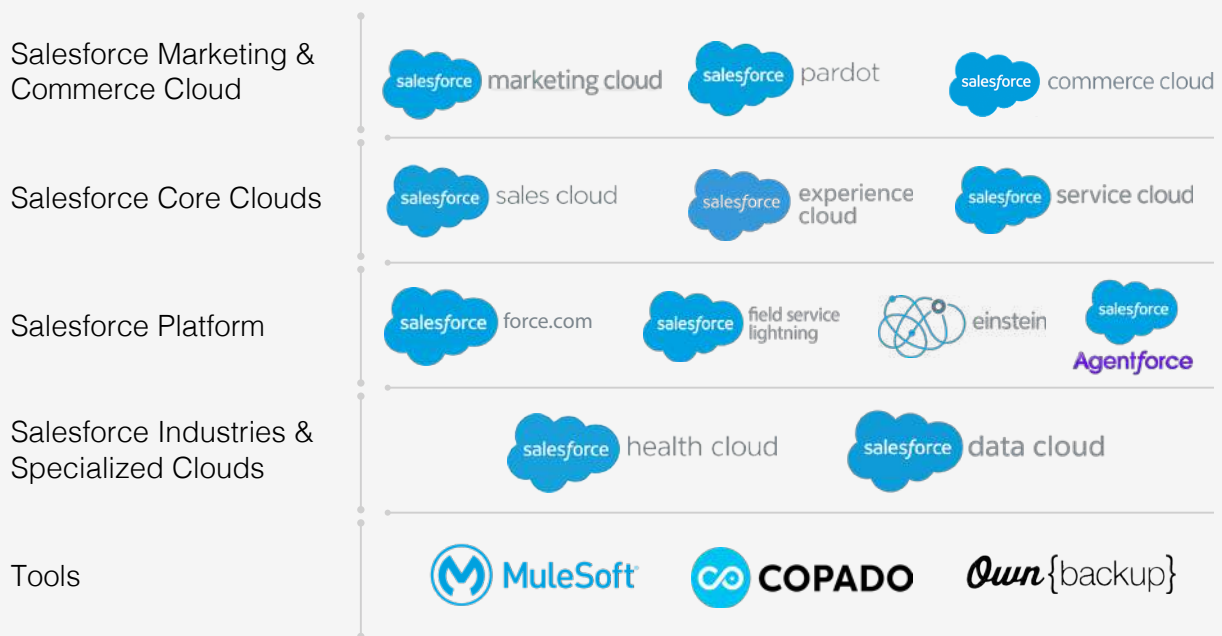


Our Service Spectrum

- **Advisory & Road mapping** – Aligning Salesforce to LS value chain strategy
- **Implementation & Integration** – Salesforce + OwnBackup + ecosystem tools
- **Managed Services** – Continuous optimization and compliance assurance
- **Innovation Workshops** – Pilots, accelerators, and adoption at scale



Our Salesforce Expertise



Future-Ready Outlook: Scaling Trust in the Age of Intelligent, Regulated Operations

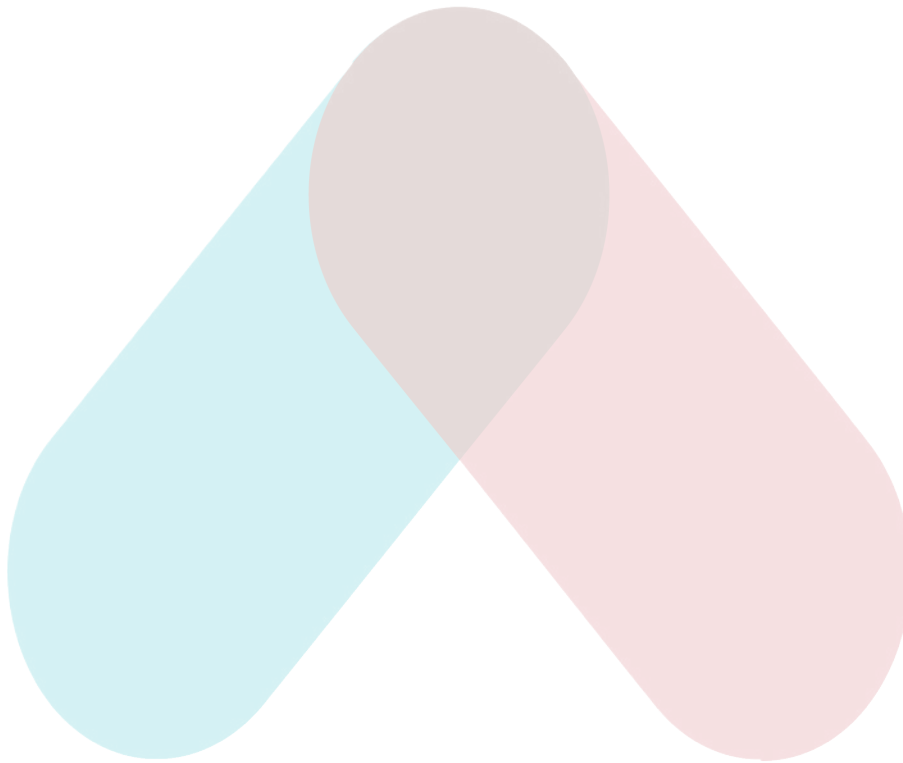
In tomorrow's data economy, trust will be the currency. Agilisium helps you scale it.

As enterprises accelerate toward data-driven, AI- powered operating models, the need for scalable, resilient, and intelligent platforms becomes critical. Agilisium, in partnership with Salesforce and OwnBackup, enables organizations to build robust digital foundations that support rapid innovation while maintaining control and continuity.

With the growing adoption of AI, analytics, and real time engagement, data quality and integrity take center stage. Agilisium helps organizations structure their Salesforce ecosystems to support scalable intelligence, ensuring systems are not just automated, but also adaptive and insight-driven.

As expectations for speed, personalization, and cross-channel coordination rise, businesses need platforms that can grow with them, seamlessly integrating new capabilities while ensuring performance and operational consistency. Agilisium delivers modular architectures, intelligent automation layers, and real-time data orchestration that evolve with your business.

The result: Salesforce becomes more than a CRM, it becomes your enterprise's digital core. With Agilisium, you scale faster, operate smarter, and lead confidently in the age of AI.



Authors

Palani Jayachandran

Salesforce Architect

Priya Narayan

Salesforce Specialist

About Agilisium

Agilisium is Life Sciences industry's premier AI-powered Data Innovation partner. Agilisium collaborates with leading pharmaceutical, biotech and medical devices companies to provide data-driven insights and innovative solutions across the value chain accelerating scientific innovation, improving patient outcomes, and enhancing access to affordable care. The company delivers cutting-edge solutions that drive impactful change by combining our strong domain expertise with Data, Cloud, Agentic AI, and Advanced Analytics.

[Learn more at visit agilisium.com](https://agilisium.com)

Let's Connect

Email at: sales@agilisium.com

