



sky data vault

SDV Provides Custom Comprehensive Salesforce Backup for a National Law Firm



The Customer

The customer is a national law firm based in the Southwest. They are a current M365 backup customer of SDV's and were so satisfied with their experience that they waited months for SDV to launch the Salesforce backup service.



The Challenge

This law firm manages a massive volume of legal case files, client records, and critical documents within Salesforce, a Salesforce AppExchange app, and a third-party document repository. With approximately 515 active users, 28 million Salesforce records, and over 80 terabytes of documents, the firm faced serious data protection gaps.

As a law firm, the customer is subject to a 7-year legal document retention requirement, meaning they must be able to retrieve case files, client documents, and correspondence going back years — far beyond the 15-day window offered by Salesforce's native Recycle Bin. The firm had already experienced a situation in which data needed to be recovered beyond the standard retention window, but the recovery was unsuccessful.

The challenge was manyfold:

- Backup the firm's entire Salesforce data and metadata
- Protect the third-party document repository with reliable, long-term backups
- Ensure new documents are continuously captured going forward
- All without disrupting the firm's high-volume docketing operations that heavily consumed Salesforce API resources.



The Solution

Sky Data Vault designed a comprehensive, multi-layered backup solution tailored to the unique needs of a legal environment. Sky Data Vault deployed its managed Salesforce Backup service to protect all Salesforce standard and custom objects, metadata, and files with granular, point-in-time restore capabilities. For the 80+ terabytes of legal documents stored in the third-party repository, Sky Data Vault architected a two-part backup strategy using Salesforce platform events and third-party APIs to back up new and updated documents in near real time.



The Results

- 7-year document retention compliance achieved with independent, immutable backups
- Granular recovery capability for individual case folders, documents, or smaller sets
- Zero disruption to daily operations via intelligent API throttling
- 80+ terabytes of legacy legal documents secured with continuous capture going forward
- 28 million Salesforce records protected with automated daily backups and point-in-time restore
- Co-managed model provides operational simplicity and ongoing expert oversight from SDV's engineering team

Why Sky Data Vault Won

Sky Data Vault won this engagement because of its willingness and technical ability to go far beyond an off-the-shelf backup product. SDV's technical leadership worked directly with the third-party repository team to architect a custom solution. SDV demonstrated engineering depth and customer care that a standard SaaS backup vendor simply cannot offer. Combined with the trusted channel partnership that served as a collaborative bridge throughout the sales cycle, the deal closed on a 48-month co-managed agreement encompassing Salesforce backup, document protection, and webhook hosting.