SOLUTION BRIEF

Secure Salesforce Data with Symmetry Systems

Challenges

When Your CRM Becomes The Target

Salesforce powers the world's most successful sales organizations, but its very strength—flexibility and ease of use—has transformed it into a critical security vulnerability. As the world's leading CRM platform, Salesforce is a natural target for attackers, yet most organizations lack the visibility and control needed to secure the sensitive data within it. Your instance has evolved into an uncontrolled data repository where:

- Sales teams upload ANY data without governance—Excel pricing models, sensitive contracts, customer SSNs, unvetted third-party data
- Platform flexibility becomes vulnerability—custom objects, fields, and attachments create endless hiding places for sensitive data
- Shadow IT proliferates as teams create unauthorized workflows, install unvetted apps, and establish risky integrations

Without enhanced discovery, intelligent classification, and automated remediation, Salesforce implementations expose organizations to breaches, compliance violations, and millions in unnecessary costs.

Salesforce Security Concerns

Data Explosion

Sales teams prioritize speed over security, uploading everything—turning Salesforce into a dumping ground with no visibility.

Cost of Native Tools

The Costs of Salesforce, Data Detect, Privacy Center and Data Mask are astronomical despite limited coverage.

Weak Identity to Usage Linkage

Profiles, permission sets, cascading privileges, and external sharing create an impenetrable maze no admin can fully understand or audit.

License Sprawl

Expensive licenses assigned to inactive users, over-provisioned access, and orphaned permissions from M&A activity hemorrhage dollars annually.

Prime Target

As the #1 CRM platform globally, Salesforce is a magnet for cybercriminals who know it contains treasure troves of data —making your instance a high-value target requiring exceptional security.

Compliance Blindness

No way to prove what users accessed, limited field history tracking, and no unified view across clouds leave you unable to answer basic audit questions.

The Symmetry Salesforce Solution

AI-Powered Data Security to Secure Salesforce Data

Symmetry Systems' modern Data+AI security platform provides unmatched visibility into your data, access, and usage across your entire Salesforce environment. Through seamless integration with Salesforce, it transforms your CRM from a security liability into a governed, compliant asset.

How Symmetry Transforms Your Salesforce Security

- **Discovers and classifies ALL data** - Our advanced AI powered classificaiton models, discover and classify both structured fields and unstructured content—attachments, PDFs, Excel files, Chatter posts, notes, and comments. The platform identifies 200+ sensitive data types including PII, PHI, PCI, and custom classifications, finding hidden data that native tools completely miss in standard fields, custom objects, or buried in uploaded documents.
- **Maps the complete data to identity graph** - Symmetry's platform untangles Salesforce's complex web of profiles, permission sets, sharing rules, and role hierarchies to show exactly who has access to what data through every possible path.
- **Provides Intelligent Automated Remediation -** Our Insight and DataGuard Enfoce Module can automatically remediate over over-privileged users and remove or arhicve exposed sensitive data without manual intervention
- **Continuously monitors with Behavorial AI** - Near Real time models detect anomalous access patterns, unusual data exports, privilege escalation and even suspicious uploads as they happen. The platform identifies when sensitive information appears in new locations, and alerts on compliance drift before audit failures—maintaining constant vigilance over your evolving Salesforce environment.

Benefits

Symmetry's AI doesn't just scan Salesforce fields—it intelligently analyzes every attachment, comment, note, and file. Enabling comprehensive protection across both structured and unstructured data in your CRM.

Complete Visibility Into ALL Salesforce Data

Unlike native tools that only see structured fields, Symmetry's AI examines EVERYTHING: attachments, Chatter files, notes, comments, and documents. Our ML models identify sensitive data wherever sales teams have hidden it—in PDFs, Excel uploads, email threads, or opportunity notes.

AI-Powered Classification That Actually Works

Eliminate frustrating false positives with Symmetry's 200+ AI-powered classifiers that use contextual AI to identify truly sensitive data in both structured and unstructured formats—reducing alert fatigue by 95% while catching what native tools miss.

Immediate ROI Through Intelligent License Recovery

ML-driven analysis of actual usage patterns across all data types enables automated rightsizing, reclaiming 20-40% of licenses in the first 30 days while ensuring users retain necessary access.

Stop your CRM from becoming your next data breach.

Symmetry's Salesforce SaaS Connector

Our AI-powered platform is engineered specifically to address modern data security challenges at scale from the data out, providing organizations the ability to innovate with confidence.

With AI-driven total visibility into what data you have (in fields, files, and notes), where it lives, who can access it, and how it's being used IN Salesforce.

Symmetry's helps safeguard your organization's data from misuse, insider threats, and cybercriminals, while preventing unintended exposure of sensitive information hidden in attachments, comments, and unstructured uploads.

Global Toy Manufacturer

Case Study

Challenges

A well-established leading fintech expanded their deployment of Symmetry's data security platform to include Salesforce. They had similar concerns about their CRM as they'd had with other systems: lack of visibility into what identities were doing in Salesforce, what data was being accessed by whom, and whether sensitive data was being stored inappropriately.

Solution

Symmetry deployed its modern data security platform and DataEnforce module, which provided comprehensive visibility across the fintech's entire Salesforce environment. The platform automatically discovered and classified sensitive data across all objects and fields, while continuously monitoring identity access patterns, and data retention periods.

Results

The deployment immediately uncovered critical security issues:

- **Compliance Exposure:** Credit card numbers and SSNs were found stored in unstructured Salesforce fields, creating immediate regulatory risk.
- **Public Data Exposure:** Several data objects in QA Salesforce were accessible to anyone via direct links, representing a severe security gap.
- **Excessive Access Privileges:** Hundreds of identities had "View All/Read All" permissions to everything in sales, violating least privilege principles.

These findings validated the expansion of Symmetry to Salesforce and prompted immediate remediation, demonstrating the value of comprehensive data security visibility across all business applications.

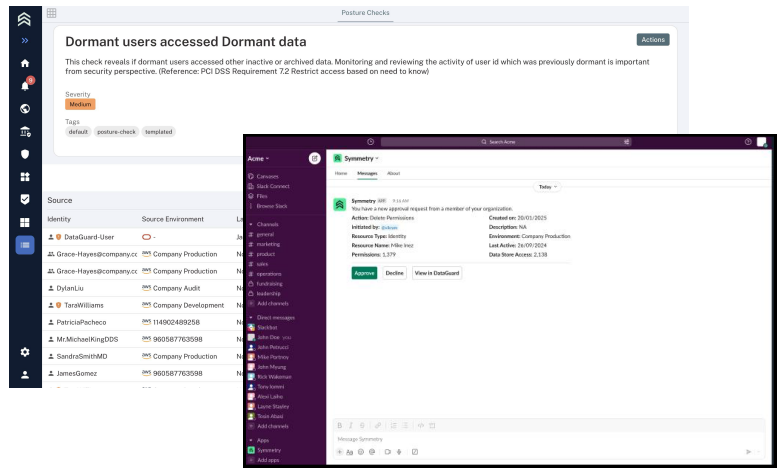
Features

AI-Powered Data Classification

Symmetry DataGuard analyzes and categorizes data, automatically applying the right classification level and label to each information asset within Salesforce. Our AI-Powered classification models examine both structured fields and unstructured content—attachments, notes, Chatter files. By dynamically classifying based on content, context, identity and usage we eliminate both over-classification that impedes productivity and under-classification that creates security risks, while ensuring accurate identification of PII, PHI, PCI, and custom sensitive data types that shouldn't exist in Salesforce.

Identity Lifecycle & License Reclamation

Symmetry DataGuard provides complete visibility into user permissions and actual usage patterns across your Salesforce environment. The platform analyzes actual vs. needed permissions, identifying inactive and over-privileged users who retain expensive licenses they don't utilize. Through ML-driven usage analysis, Symmetry uncovers immediate opportunities for license rightsizing



DataEnforce automatically implements compliance-aware data lifecycle decisions, distinguishing between regulatory retention requirements and business value assessment. The platform applies intelligent retention policies ensuring GDPR, HIPAA, SOX compliance while maximizing data minimization opportunities through automated archival, secure deletion, and adaptive retention management. By understanding what data exists in both structured fields and unstructured attachments, Symmetry enables organizations to reduce their attack surface, lower storage costs, and maintain audit-ready compliance—all while preserving business-critical information according to regulatory mandates and litigation holds.

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