

## Listrak Unlocks the Power of Customer Data, while OwnBackup Securely Protects their Information



**Industry:** Technology/  
Digital Marketing

**Location:** Lititz, PA

**Founded:** 1999

**Employees:** 325

### HIGHLIGHTS:

- 1** Full, daily backups on production and sandbox data and metadata
- 2** Compare tool to investigate and pinpoint granular data changes between different backups
- 3** Proactive reporting on any data changes through Smart Alerts

### ABOUT LISTRAK

Listrak helps marketers unlock the power of their customer data to create personalized, 1:1 interactions that drive incremental revenue, engagement, lifetime value and growth.

Fueled by artificial intelligence, actual human intelligence, machine learning and predictive analytics, the Listrak platform boasts a comprehensive set of marketing automation and CRM solutions that unify, interpret and personalize data to engage customers across channels and devices.

### BACKGROUND

#### Salesforce plays a pivotal role in Listrak's company operations

Salesforce is ingrained within almost every department at Listrak, especially within the Sales department. Salesforce is a central point of reference for both their inside and outside sales team. With about one million records and five full and 15 developer sandboxes, Listrak heavily relies on the availability and integrity of Salesforce data. Aside from lead and prospect tracking, Salesforce automatically creates invoices, facilitates customer support interactions and takes care of billing for Listrak. Even a minor Salesforce data loss or corruption would put at risk Listrak's day-to-day company operations.

## THE CHALLENGE

### **Listrak was lacking reliable data protection, data alerts and data visibility**

Lack of visibility into changes to Listrak's Salesforce data was making troubleshooting sudden changes to their Opportunity Pipeline reports difficult to near impossible. Opportunities that were accidentally deleted in the pipeline would go unnoticed until Management discovered an unexplained change in the forecasted revenue reports. The inability to locate lost records and track down those responsible was cutting into overall productivity.

In addition, once a data loss or corruption was detected, Listrak was finding it difficult to find and restore the data. After a minor data loss, Listrak found out how difficult it is to recover lost data and sought more comprehensive data protection that could not only safeguard their vital business data, but also help them in overseeing and managing it more effectively.

## OWNBACKUP'S SOLUTION IN-ACTION

### **OwnBackup speeds up Listrak's operations with daily backups and proactive data management**

As Listrak's data protection vendor, OwnBackup wasted no time in proving itself a reliable backup and recovery option. Shortly after OwnBackup went live, the Smart Alert capability notified Salesforce administrators about the sudden deletion of 400 accounts. The team quickly discovered the user at fault and put a better process in place to manage the cleaning of accounts.

On another occasion, it was thought that Listrak's Salesforce platform team deleted opportunities, skewing the sales pipeline by \$300,000. With OwnBackup's Compare tool, Listrak's Salesforce admin quickly figured out that someone in another department had changed the opportunity, ending inter-departmental tension.

In another scenario, 20 objects were mysteriously being manipulated, but it was unclear if it was a specific person or automation tool. Listrak's Salesforce platform team used OwnBackup's Compare tool to find out that one of Listrak's 3rd party external connections were erroneously changing information, overwriting good data with bad data. Listrak was able to help the 3rd party troubleshoot and fix the error.

With such a complex Salesforce environment, Listrak has found OwnBackup's Smart Alerts and Compare tools invaluable.



## SUMMARY

Due to the sheer concentration of valuable business information stored within their Salesforce platform, Listrak knew they had to bolster their data protection strategy. OwnBackup, with its advanced backup and recovery tools, coupled with its proactive data management capabilities was able to effectively protect all of Listrak's Salesforce information. These capabilities included but were not limited to:



Daily data and metadata backups



Compare Tool for visual data change analysis



Quick restoration of affected records



Smart Alerts for proactive data monitoring

## ABOUT OWNBACKUP

OwnBackup, a leading cloud-to-cloud backup and restore vendor, provides secure, automated, daily backups of SaaS and PaaS data, as well as sophisticated data compare and restore tools for disaster recovery. OwnBackup covers data loss and corruption caused by human errors, malicious intent, integration errors and rogue applications. Co-founded by seasoned data-recovery, data-protection and information-security experts, OwnBackup is a top backup and restore ISV on the Salesforce AppExchange and was selected as a Gartner 2015 "Cool Vendor" in Business Continuity and IT Disaster Recovery. For more information, visit <http://www.ownbackup.com>.

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*We installed OwnBackup a couple months ago. It's so easy to use and includes some very helpful features, including daily data and metadata backups, Compare and Restore. On numerous occasions, we've been able to figure out exactly why an opportunity report changed using the Compare tool and bring that data back within minutes. A big thanks to OwnBackup for creating a great tool!”*



- Scott Hankins,  
Director of ERP,  
Listrak