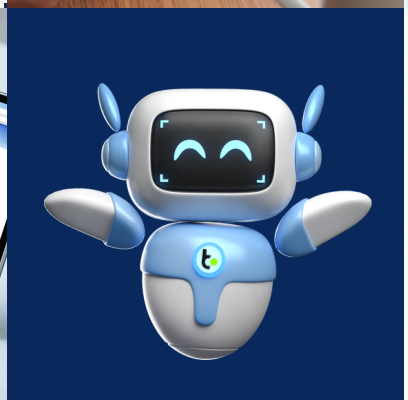
The Salesforce Security **Blind Spot**

7 PITFALLS THAT COULD SINK YOUR ORG

This e-book highlights the key blind spots, common misconceptions, and urgent steps you need to take to secure your Salesforce environment effectively. We'll show you what to look out for, how to address vulnerabilities head-on, and why your organization can't afford to ignore these red flags.

Read more >>



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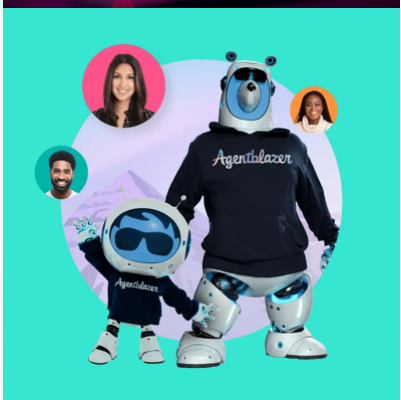


About Us

In today's SaaS-driven ecosystem, Salesforce sits at the heart of many organizations' most critical processes from sales pipelines to customer data management.

Yet, too many CISOs, Business Systems Leaders, and App Owners assume Salesforce is "secure by default," while others rely on outdated checklists meant for on-premises or IaaS environments. **Big mistake.**

01

Salesforce Isn't Secure by Default And That's On You

Salesforce provides robust infrastructure security, think data centers, network architecture, and physical safeguards. But once you start customizing your instance, the security burden shifts to you.

02

Your Checklists Don't Work for SaaS

Traditional security frameworks were built for on-premises servers or IaaS environments where you control the hardware and virtual machines. SaaS is different.

03

The Real Risk of Misconfigurations

Even a small change like granting a user temporary admin privileges can linger unnoticed if not tracked properly.

04

Audit Your SaaS or Pay the Price

Many organizations mistakenly believe that purchasing a SaaS solution transfers all security responsibilities to the vendor. This leads to minimal or zero audits of the environment, a dangerous gamble.

05

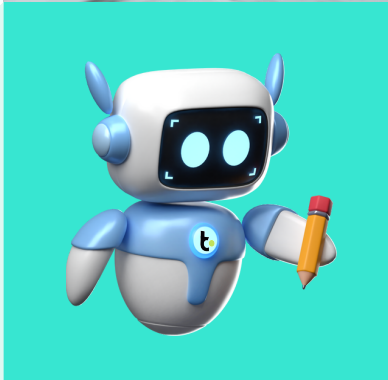
Stop Using SaaS as a Black Box

Salesforce generates millions of events each month, from user logins to report exports. Without a robust monitoring strategy, this wealth of data quickly becomes noise.

06

Your Consultants Aren't Security Experts

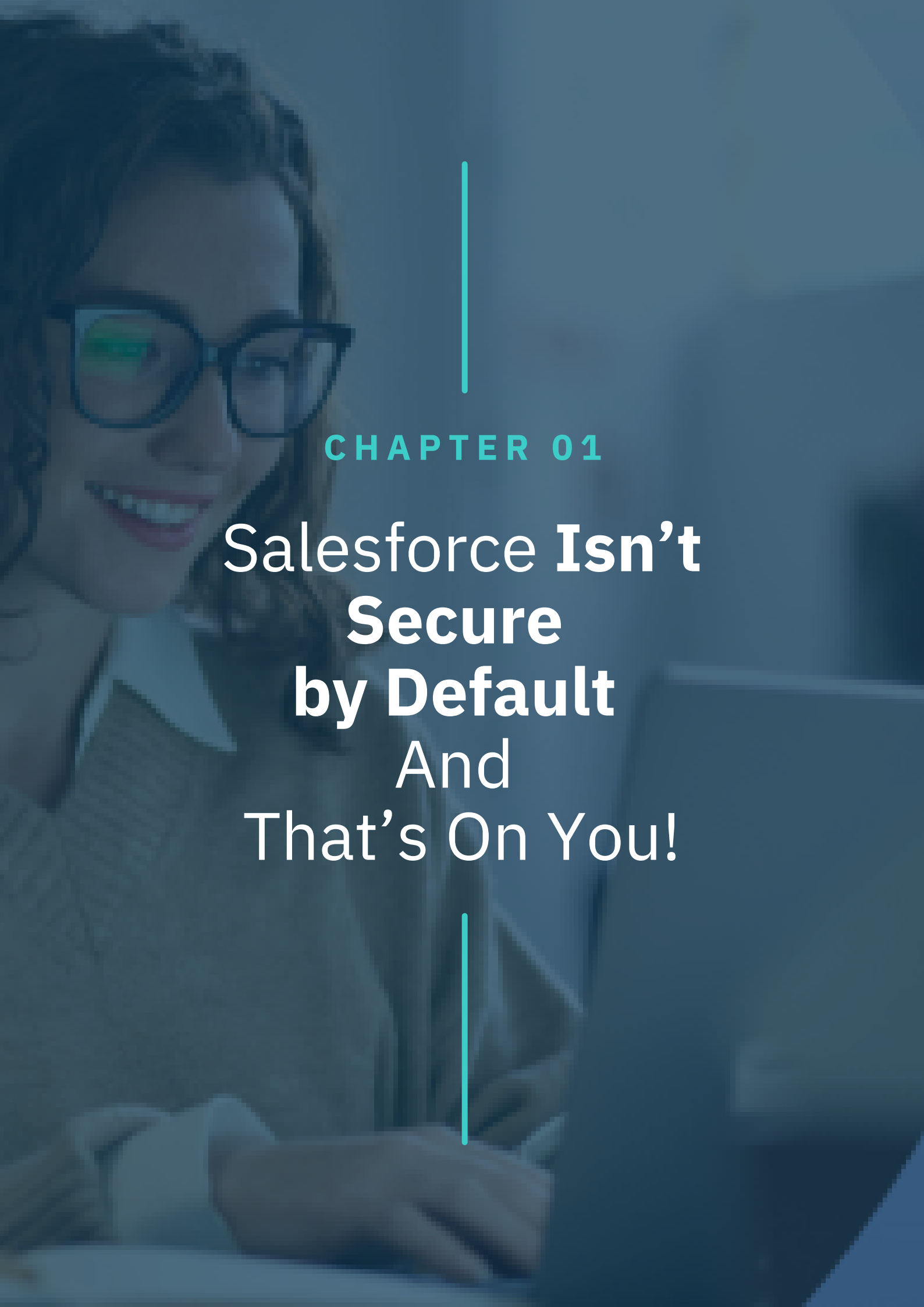
Consultants excel at building Salesforce solutions, not securing them. Configuration mistakes, unsecure Apex code, and open APIs can introduce serious vulnerabilities.



07

SaaS-to-SaaS: The Hidden Weak Link

Most Salesforce orgs rely on multiple SaaS-to-SaaS integrations like marketing automation, help desk software, or e-signature solutions. Each connection expands your attack surface.



CHAPTER 01

Salesforce **Isn't Secure by Default** And That's On You!

Why This **Matters**

SALESFORCE PROVIDES ROBUST INFRASTRUCTURE SECURITY - THINK DATA CENTERS, NETWORK ARCHITECTURE, AND PHYSICAL SAFEGUARDS.

But once you start customizing your instance, the security burden shifts to you.

COMMON PITFALLS?

1. Assuming Default Settings Are Enough

- Many organizations never review or adjust out-of-the-box configurations, leaving open guest access or broad user permissions in place.

2. Neglecting Integration and Connected App Permissions

- Default settings often overgrant access to connected apps, using unnecessary admin privileges.

POTENTIAL CONSEQUENCES?

REVIEW ALL DEFAULT SETTINGS:

Immediately adjust any open privileges, guest profiles, or public access points.

IMPLEMENT A SHARED RESPONSIBILITY MINDSET:

Train your teams - IT, security, and business units that, while Salesforce secures the infrastructure, your configurations and data controls, are on you.

KEY TAKEAWAY:

If you assume Salesforce handles everything, you're already behind. Proactive configuration is crucial to lock down your environment.

CHAPTER 02

“Your **Checklists Don’t Work** for SaaS”

The Legacy Checklist Problem

Traditional security frameworks were built for on-premises servers or IaaS environments where you control the hardware and virtual machines. SaaS is different. Salesforce's metadata-driven architecture means changes occur frequently, and third-party integrations can introduce new vulnerabilities on the fly.

RISK 01

Misconfigured Integrations

- Connecting apps like Marketo, Clari, ZoomInfo, D&B, Outreach or other SaaS tools can accidentally expose sensitive data if permissions aren't set correctly.

RISK 02

SaaS-to-SaaS Vulnerabilities

- Data often travels between multiple cloud services, creating a chain of potential weak links.

RISK 03

API Exposures

- APIs can be a double-edged sword; they streamline processes but can also be exploited if not secured properly.

WHY TRADITIONAL CHECKLISTS FAIL

- **Lack of Real-Time Monitoring:** Old checklists assume periodic audits, but SaaS changes can happen daily or even hourly.
- **No Metadata Awareness:** On-prem checklists focus on software/hardware versions, while Salesforce leverages complex metadata structures that affect data security.

Action Steps

- **Adopt SaaS-Specific Frameworks:** Look at SSPM (SaaS Security Posture Management) solutions tailored for platforms like Salesforce.
- **Real-Time Policy Enforcement:** Create and enforce security policies that adapt instantly as new apps are added, roles change, or integrations evolve.

CHAPTER 03

The **Real Risk** of **Misconfigurations**

Why **Misconfigurations Happen**

Even a small change like granting a user temporary admin privileges can linger unnoticed if not tracked properly. Large Salesforce instances often have thousands of settings across profiles, permission sets, and custom objects.

KEY VULNERABILITIES

OVERPRIVILEGED USERS

Users end up with the “keys to the kingdom,” able to access and manipulate data far beyond their job scope.

UNSECURED THIRD-PARTY APPS

Each connected app can become an attack vector if it’s not vetted for security compliance.

GUEST ACCESS OVERSIGHTS

Public-facing portals or community user accounts can inadvertently expose internal data.

IMPACT ON ORGANIZATIONS

DATA LEAKAGE

Sensitive customer information can be visible to the wrong people - internal or external.

REPUTATIONAL DAMAGE

A high-profile breach tied to sloppy misconfigurations can undermine trust in your entire brand.

Action Steps

Implementing the **Least Privilege Principle** by regularly reviewing roles and permission sets ensures users have only the access they need, minimizing risks associated with overprivileged accounts. Complement this with **Automated Monitoring solutions** that proactively scan for misconfigurations and flag potential exposures in real time, providing an additional layer of protection against security breaches.

CHAPTER 04

“**Audit** Your SaaS or **Pay the Price**”

The Cost of Neglect

Many organizations mistakenly believe that purchasing a SaaS solution transfers all security responsibilities to the vendor. This leads to minimal or zero audits of the environment - a dangerous gamble.

AREAS OFTEN OVERLOOKED

Neglecting access logs? Skipping documentation on permission changes? Giving third-party apps full CRUD access? These are ticking time bombs. Stay alert, tighten controls, and stop inviting trouble.

Why Auditing **Matters**

1. Staying Ahead of Threats

- Regular audits help you spot unusual activity early like spikes in data downloads or repeated login failures.

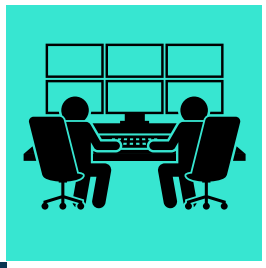
2. Overlooking Releases

- Configuring Salesforce without a 360° view or proper review often introduces new vulnerabilities.

ACTION STEPS

Review Logs and Permissions

Utilize Salesforce Event Monitoring



Schedule Regular Security Audits

Monitor Integrated App Access

KEY TAKEAWAY: Audits aren't optional. They're your best defense against stealthy threats and a key component of any compliance strategy.

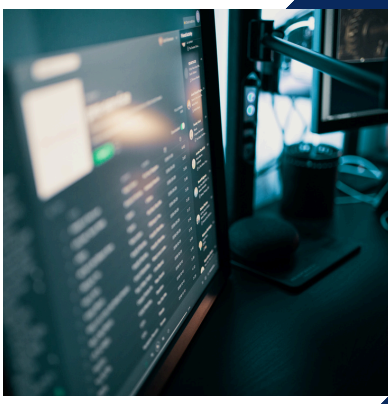
CHAPTER 05

Stop Using **SaaS** as a **Black Box**

Data Overload & Alert Fatigue

Salesforce generates millions of events each month, from user logins to report exports. Without a robust monitoring strategy, this wealth of data quickly becomes noise, overwhelming security teams.

COMMON PITFALLS



01 Undefined Alert Thresholds

You either get alerted about everything or nothing, neither is helpful.

02 Siloed SOC Teams

Often, security operations have limited visibility into SaaS logs, which sit with a separate admin team.

03 Missing Context

Even if you see the events, you might not understand the business impact or correlation to other incidents.

PRACTICAL VISIBILITY TACTICS

- **Integrate with SIEM/SOAR:** Funnel Salesforce logs into your existing Security Information & Event Management (SIEM) platform for correlation and automated response.
- **SSPM Tools:** SaaS Security Posture Management solutions analyze event logs in real time, helping you prioritize critical alerts.

Action Steps

Trigger Alert Actions

Enable Cross-Functional Workflows

Collaborate Across Teams

Know your risks. Identify high-risk actions like mass exports or unusual logins, and ensure they trigger immediate alerts. Don’t work in silos - get your admins, security, and compliance teams aligned. Collaboration is your strongest defense.

Key Takeaway: Don’t ignore the treasure trove of logs. Turn raw data into actionable insights, or risk letting threats slip through the cracks.

CHAPTER 06

Your **Consultants Aren't Security** Experts

Role Clarity

Consultants excel at building Salesforce solutions, not securing them. Configuration mistakes, unsecure Apex code, and open APIs can introduce serious vulnerabilities.

WHAT CAN GO WRONG

INSECURE CODE/CONFIG

Poor coding/configuration practices can lead to SQL injection, cross-site scripting, or other exploitable flaws.

API WEAKNESSES

APIs that aren't locked down can become easy targets for data exfiltration.

PRIVILEGE ESCALATION

If devs aren't trained to think about least privilege, they might grant unnecessary admin rights to code or users.

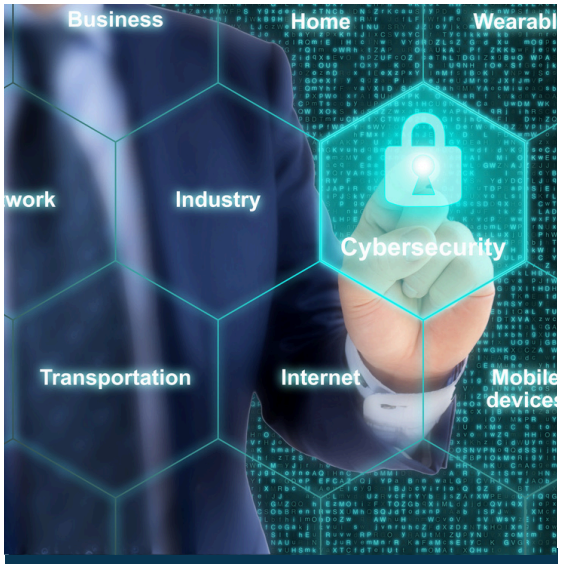
BRIDGING THE GAP

SECURITY-FOCUSED TRAINING

Incorporate secure coding principles into your dev onboarding and ongoing education programs.

PROACTIVE VULNERABILITY ASSESSMENT

Run regular scans and penetration tests on Apex code and custom integrations.



Action Steps

Integrate security into your development lifecycle by embedding testing directly into CI/CD pipelines through **DevSecOps practices.** Strengthen this approach by appointing **Security Champions** within each squad to ensure security remains a constant focus throughout the development process.

Key Takeaway: You don't need your devs to be CISOs, but you do need to equip them with the right tools, training, and oversight to ensure secure code.

CHAPTER 07

SaaS-to-SaaS The Hidden Weak Link

Expanding **Attack Surface**

Most Salesforce orgs rely on multiple SaaS-to-SaaS integrations like marketing automation, help desk software, or e-signature solutions. Each connection expands your attack surface.

Common Oversights

01

Authorization Scope

- Many third-party apps are granted full access when they only need partial.

02

Data Visibility

- Sensitive fields in Salesforce might be inadvertently shared with external apps.

03

Revoking Access

- Teams rarely have a process to quickly kill API tokens and credentials if a breach is suspected.

BEST PRACTICES

- **Enforce Granular Permissions:** Restrict each third-party app to the minimum data and permissions needed.
- **Centralized App Catalog:** Maintain a real-time inventory of all connected apps and the data they can access.
- **Automated Deprovisioning:** Be ready to rapidly revoke access if you detect suspicious activity or no longer need the app

ACTION STEPS

- **Periodic Integration Reviews:** Include connected apps in your regular SaaS audits.
- **Zero-Trust Mentality:** Treat every integration like an external endpoint - verify, monitor, and limit their scope.

Next Steps: **Transform Insights** Into **Action**

ASSESS YOUR CURRENT POSTURE

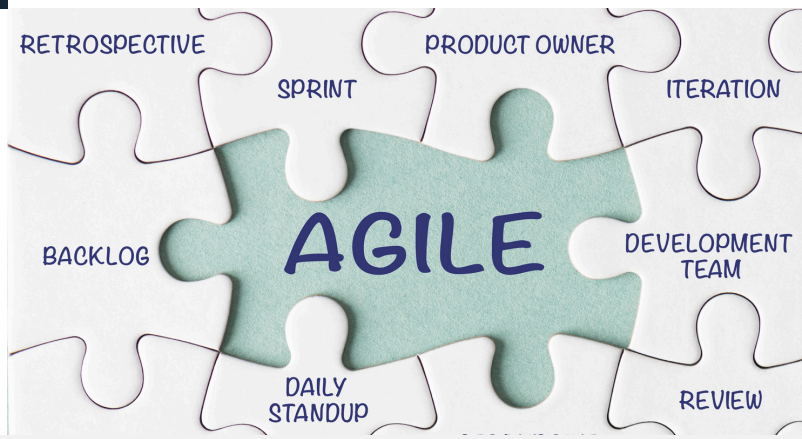
Conduct a thorough review of your Salesforce org using the chapters in this e-book as a checklist.

LEVERAGE THE RIGHT TOOLS

Explore SSPM solutions, adopt automated monitoring, and integrate logs into your SIEM.

TRAIN YOUR TEAMS

Educate consultants, developers, admins, and business leaders on their specific roles and responsibilities in maintaining a secure Salesforce environment.



STAY AGILE

The SaaS threat landscape evolves quickly. Commit to continuous improvement and regular audits.

Get In Touch

If you're serious about locking down your Salesforce environment and want a deeper dive into any of these topics:

Schedule a 1:1 Consultation

Request a Customized Salesforce Security Audit

Sign Up for Our Next Webinar

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