

Customer Case Study: Salesforce

How Alation Enables Trusted Data Discovery
at Salesforce



- **Industry:** Technology
- **Headquarters:** San Francisco, California
- **Interesting Fact:** Salesforce became the world's largest enterprise software firm in 2022

Challenge: Tame sprawling, siloed data

Rapid growth at Salesforce resulted in a complex, sprawling data environment across multiple clouds and systems. Analysts found it difficult to find, trust, and collaborate on data across business units.

The company also lacked consistent, updated data policies, which led to a lack of trust in data. Salesforce needed to identify data owners, create consistent enterprise-wide data definitions, and encourage [self-service data](#) access while mitigating risk.

To address these challenges, Salesforce sought an [enterprise-grade data catalog solution](#). This platform would allow business teams to explore data within a secure framework and serve as a one-stop shop for data discovery.

"We take pride in our trust-first mindset and build security into everything we do," says [Pavan Tumu](#), director of product management at Salesforce. The chosen solution would need to offer a high level of security and performance to enforce trust in data at all levels of the business.

Business Results



**280K average monthly
analyst queries**



**4,600 users securely
access data**



**1 place for Snowflake
data discovery**



As an industry leader ourselves, we choose to partner with companies like Alation that have the same innovative fabric, and who also enjoy the same industry recognition that we do.

Pavan Tumu
Director of Product Management, Salesforce

Objectives

Salesforce set out to empower people to trust and collaborate around data, driving innovation, while at the same time giving them critical guidance to maintain security and compliance. This meant they needed to:

- Create an enterprise view of data
- Provide governed self-service data access
- Ease data migration to [Snowflake](#)

Implementation

Enabling self-service data discovery

In 2015, the Data Science Team at Salesforce began using Alation and in 2018, Salesforce deployed Alation to the enterprise. Today, the [data catalog](#) enables more than 4,600 data users across the business to discover, understand, consume, and collaborate around data.

The partnership was a natural pairing. “As an industry leader ourselves, we choose to partner with companies like Alation that have the same innovative fabric, and who also enjoy the same industry recognition that we do,” says Tumu.

In Alation, Salesforce users can access trusted data (with business context) instantly. Machine learning features guide people to the most relevant information within their business flows. “This allows our communities to scale to work faster and

achieve more, but do so in a smart way,” says Tumu. Alation’s collaboration features lower barriers to knowledge sharing and make the analytics environment more transparent.



I would highly recommend [implementing] Alation before starting your Snowflake migration.

Vikas Sangwan
Global Head of Data Platform, Engineering and AI, Salesforce

Migrating to the Snowflake Data Cloud

That transparency was critical when it came time for Salesforce to migrate from their Oracle data warehouse landscape to the Snowflake Data Cloud. To prepare, Salesforce used Alation to identify what data to migrate and whom to tap for help, creating a map with the key players who would shepherd the migration and become stewards in the new system. Salesforce also used cataloged metadata to create data access rules to protect private information and scale their system.

Cataloging their metadata before migration offered several benefits: Salesforce aligned business to data metrics, set policies, and added tribal knowledge to the cloud platform. Using metadata to inform migration enabled self-service for future users, and helped Salesforce leaders set their data warehouse up for success.

Alation absorbed the technical metadata, which Salesforce then augmented with descriptions, classifications, owners, and stewards.

Results: 4,600 people running 280,000 Monthly Queries

Today, Alation is a core data discovery platform for analytics, security, and compliance teams across Salesforce. It provides a one-stop shop for Snowflake data discovery across the enterprise.

Salesforce uses Alation to tap into the collective intellect of the company to make their data more usable, promote curated content, and drive the trust that encourages further adoption of the data catalog. Certified, curated content instills confidence and a “data for all” mindset within the organization.

The result? Analysts and engineers now spend their time using instead of searching for data. More than 4,600 folks at Salesforce run an average of 280,000 queries monthly in Alation. “Alation is the preferred big data interactive query tool for our data engineers, data scientists, and analysts alike,” says Tumu.

About Salesforce

[Salesforce](#) is known as “the customer company.” Their cloud-based Customer 360 CRM suite of products unites sales, service, marketing, commerce, and IT teams with a single view of customer information. Founded in 1999, Salesforce became the world’s largest enterprise software firm in 2022. Salesforce is headquartered in San Francisco and employs more than 79,000 people globally.

Data Environment

- Snowflake
- Redshift
- Oracle
- Hadoop
- MySQL
- Tableau