



Your Ultimate SaaS Backups Checklist

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Determining your need for backups

Perform an audit of your current SaaS applications by asking yourself:

- How does your organization define “business-critical” when it comes to applications and data?
- Is your organization using SaaS applications? If so, which ones? Who owns them?
- Do any of these applications or their data meet your criteria for business-critical?

Determine if your SaaS data is at risk (if yes, it's time to implement a backup strategy):

- Are you making a material change to a data set (for example, importing data from one system to another like with a CSV import)?
- Do your SaaS applications share data with other applications?
- Is your data shared with multiple stakeholders internally or externally?
- Does the SaaS application have administrators outside of the IT department?

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Preparing your backup strategy

- Read the Terms & Conditions for each application to determine your responsibility for the protection of its data

- Learn more about the [Shared Responsibility Model](#)

- Ask yourself these important questions, which will help you set goals:

- How do you need these assets to be protected?
- How often do you need your backups to take place? Daily, monthly, or yearly?
- How long will you need to keep that data and why?
- Where will you store your backups?
- What operational efficiencies would you like to see as a result of this strategy?
- How can you minimize risks, and ensure that you can recover data quickly if disaster strikes?

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Assessing your backup options

- Once you know what you need from a backup strategy, consider your options: DIY or a dedicated solution

If you choose the DIY option, make sure you have the following:

- Budget to pay for offsite storage (full exports take up a lot of space!)
- Security in place for that storage
- A plan to categorize and version each backup
- Team members with knowledge of API scripting
- Time to maintain the script or tool and fix bugs
- A continuity plan in place, if your backup tool expert should become unavailable

If you choose a dedicated solution, consider the following:

- How many of your SaaS applications will it cover?
- How frequently does it back up?
- Does it include secure storage?
- How does it handle versions?
- How reliable and easy is it to restore from?
- How much will it cost?
- What kind of support does it offer?

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Building your backup strategy

Follow these steps to maintain your strategy year-round:

- Select an approach based on your criteria above
- Assign ownership of the execution and consultation for the backup strategy
- Set up your chosen backup method
- Perform your first backup and run a test restore
- Create a schedule for backup tests and reviews
- Take inventory and review any new SaaS apps against your criteria on a regular basis cadence

[Learn more](#) about the importance of protecting your business-critical SaaS data and why it should be a key component of your 2024 backup strategy!