



RISK ASSESSMENT CHECKLIST

The integration **risk assessment** for customer success

Don't manage risk. Eliminate it.



Vulnerability Map

Where your data is most exposed.



Stability Score

How external tokens threaten business continuity.



Efficiency Audit

The true cost of managing separate databases.

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Is your customer success platform a hidden security risk?

Many Customer Success Platforms rely on fragile integrations that expose critical customer data and introduce security, operational, and scalability risk. Every API, token, and external database becomes a potential point of failure—undermining trust, reliability, and growth.

Recent security incidents make it clear: integration is no longer just an architectural choice—it's a business risk. When customer data lives outside the Salesforce Trust Domain, exposure increases, costs rise, and insights become fragmented.

This checklist helps you determine whether your Customer Success architecture is managing risk—or eliminating it—by uncovering hidden vulnerabilities across security, operations, and scale in just 10 questions.


If you answer **YES** to any of the questions below, your customer data is being exposed to unnecessary risk and operational complexity.



10 Questions to assess your CS data security risk

Platform and Data Integrity


Does your CS platform rely on API or OAuth tokens to exchange data with Salesforce?

 If a high-privilege token is compromised just once, it grants a hacker persistent, ongoing access to your sensitive Salesforce data.


Does your critical customer data ever leave the Salesforce Trust Domain for external storage or processing?

 Data custody failure: You are exposed to external storage risk and non-compliance when data resides outside your secure CRM environment.


Is your Customer Success application built using a dual-security model, requiring you to trust both Salesforce and an external vendor?

 Governance is complicated, audits are complex, and your security is only as strong as the weakest link in that external connection.

Is your customer data subject to latency or discrepancy because it requires Extract, Transform, Load (ETL) between two separate databases?


 Fragmentation leads to unreliable customer health scores and flawed AI insights, meaning your team is acting on outdated information.

Could a security incident cause a temporary disabling or removal of your core CS application due to external token revocation?

 Instability and business continuity risk, leading to immediate operational chaos and client anxiety.

Operational and Financial Risk (TCO)


Do you have dedicated administrative resources managing complex, brittle integrations and data synchronization between your CRM and CS platform?

 Higher Total Cost of Ownership (TCO) and slower time-to-value due to constant maintenance and complex configuration.

Do your Sales, Service, and Customer Success teams operate in functional silos, working off different versions of the customer record?

 Perpetuates fragmented customer experiences, prevents smooth handoffs, and limits growth/expansion opportunities.

Does your CS platform force you to create manual handoffs and new data silos instead of leveraging existing services and project data?


 Creates a “black hole” in the customer journey that makes outcomes harder to measure and value harder to prove.

Future & Scale Risk

Do you worry that new Salesforce releases could potentially break or require re-engineering of your Customer Success integration points?

 Your platform is not seamlessly scalable and relies on your vendor’s ability to keep pace with major platform updates.

Is your AI strategy limited by the need to pull clean, unified customer data from multiple, disparate systems?

 Your AI is only as good as the fragmented data it’s built on, preventing you from automating processes and predicting needs efficiently.

Certinia: The native solution

If you answered **YES** to any of these questions, your current integrated platform is exposing your organization to systemic risk.



Certinia's **Customer Success Cloud** eliminates this vulnerability by being built **100% natively** on the Salesforce Platform. This is not an integration; it is inheritance.



Inherited Security:

Automatically benefit from Salesforce's enterprise-grade security and compliance standards.



Unified Data:

All customer data lives in one place—your Salesforce org—for a single, real-time source of truth.



Zero Integration Risk:

We eliminate the need for external connections, guaranteeing stability during security events.

See how secure Salesforce-native CS Cloud can transform your business in as little as 4 weeks.

[Get started today >](#)

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