

salesforce

PARTNER



Case Study

Snapshot

Financial Services

Operating in 30 countries with more than 20,000 employees and billions in annual revenue, this multinational provider of investment analytics and credit risk data faced growing compliance obligations, increased org complexity, and pressure to reduce operational risk across business units.

Metazoa, a trusted ISV partner based in California, builds advanced org management solutions for complex Salesforce environments. Our flagship product Snapshot empowers admins and developers to eliminate technical debt, enforce compliance, strengthen security, streamline org health and lower the total cost of ownership.



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Snapshot eliminated our reliance on outdated profiles, reduced org complexity, and helped us enforce GDPR and other compliance mandates. It's a must-have for our enterprise team.

Senior Salesforce Architect

Customer Challenges

Documentation Gaps

- Manual reports are slow and error-prone
- Key metadata assets missing from audit
- Org comparison for unauthorized changes

Data Quality Concerns

- Unused fields boost technical debt
- Sensitive data lacks proper classification
- Forgotten assets reduce org agility

Confusing Permissions

- Moving from Profiles to Permission Sets
- Lack of visibility into combined security
- Folder-level security requires scrutiny



Snapshot Results

Compliance Documentation



Snapshot documented Objects, Fields, and Sharing Rules with the Data Dictionary and Org Dictionary. Scheduled reports with workflow ensure continuous compliance and visibility.

Permission Management



Snapshot eliminated redundant Profiles and created Permission Sets to make up the difference. Matrix reports provide combined security and folder sharing for auditors.

Data Quality Enrichment



Prompt Automation analyzed security classification across 2,000 + Custom Fields. Snapshot uncovered GDPR risks and enabled efficient remediation of compliance issues.

Zero Trust Architecture



Snapshot runs entirely within the customer environment. No intermediate cloud or database is involved. This is ideal for financial institutions with strict data governance policies.