## **Meeting: Discovery — Non-Functional, Compliance & Data Governance**

**Date:** 2025-11-18  
 **Duration:** 1 hr 50 min  
 **Location:** Horizon Travel Group HQ — Conference Room D  
 **Attendees:**

* **Martin Keller** – COO
* **Priya Menon** – GM, Corporate Housing
* **Angela Brooks** – Head of Transportation
* **David Lee** – CRM Champion
* **Karan Gadani** – Project Manager
* **Dhruv Mehta** – Salesforce Consultant
* **Ananya Rao** – Technical Architect
* **Vikram Joshi** – IT & Compliance Officer

### **Opening Context**

**Karan:** This session is focused on the “behind-the-scenes” aspects — performance, privacy, integrations, and data. We’ll also define how we manage access and compliance post-go-live.

**Martin:** Right. We’ve covered functionality. Now let’s ensure we meet audit, security, and performance standards.

### **Performance & Scalability**

**Dhruv:** Salesforce is inherently scalable, but we’ll still need to define data limits. For example, based on your current volume — around 3,000 client records and growing — we can comfortably store five years of transactions.

**Vikram (IT):** Any risk of hitting API limits once we integrate with QuickBooks?

**Ananya:** We’ll configure scheduled syncs at off-peak hours to stay within API thresholds.

**Martin:** And what about file attachments like agreements?

**Dhruv:** We’ll use Salesforce Files — they’re version-controlled. Older documents can be archived to Azure Blob via integration if needed.

### **Security & Access Controls**

**Vikram:** Data privacy is key. We handle international clients, so we need to comply with GDPR and U.S. data residency rules.

**Dhruv:** We’ll enforce field-level security for sensitive data — passport numbers, addresses, payment info — and mask them for non-admin roles.

**Ananya:** We’ll also enable audit logs for user activity and use role-based sharing rules.

**Martin:** Good. What about user authentication for the portal?

**Dhruv:** Multi-factor authentication will be mandatory for all external users.

**Vikram:** Perfect — that satisfies audit requirements.

### **Backup & Recovery**

**Karan:** How are we handling data backup?

**Dhruv:** Salesforce provides daily backups, but we’ll configure an additional weekly export to Azure via API — so you have your own copy.

**Vikram:** That’s fine. Just ensure it’s encrypted in transit and at rest.

**Ananya:** Yes, we’ll use AES-256 encryption for exports.

### **Logging, Monitoring & Maintenance**

**Dhruv:** We’ll also integrate Salesforce logs with your Azure Log Analytics instance. That way, IT can monitor errors or failed API calls directly.

**Karan:** Great — that gives visibility to our internal DevOps.

**Vikram:** Can we get monthly system health reports?

**Ananya:** Yes — Salesforce’s Trust Dashboard can be configured for uptime, errors, and latency.

### **Compliance & Data Handling**

**Martin:** We occasionally handle government clients. Will Salesforce meet their compliance requirements?

**Dhruv:** Yes — Salesforce is compliant with ISO 27001, SOC 2, and GDPR. We’ll also restrict data residency to the U.S. data center for your org.

**Vikram:** Excellent. We’ll document this for our compliance audit.

### **Integration Reliability**

**Dhruv:** The key integrations — QuickBooks, DocuSign, and Outlook — will use stable connectors. We’ll build retry mechanisms for API calls.

**Priya:** Will users get notified if integration fails?

**Ananya:** Yes, Salesforce will send an alert to admins automatically.

### **Non-Functional Requirements**

**Karan:** Let’s list a few key NFRs explicitly.

**Dhruv:** Sure:

* **Availability:** 99.9% uptime through Salesforce SLA.
* **Performance:** Page load under 3 seconds for standard screens.
* **Data retention:** Five years active, then archived.
* **Auditability:** Full change tracking on key records.
* **Security:** Field-level encryption, role-based visibility, MFA.
* **Integration Reliability:** Retry logic with logging and notifications.

**Martin:** Excellent summary.

### **User Adoption & Support**

**David:** Once live, how will we handle support tickets?

**Dhruv:** We can configure a “Support Request” object in Salesforce to log issues. It’ll route to your IT or to us, depending on category.

**Karan:** Let’s include that as part of the post-go-live support model.

**Martin:** Good. We’ll keep the first three months under CloudEdge support, then transition to internal.

### **Closing Summary**

**Dhruv:** We’ve now covered everything — functional, non-functional, compliance, and security. I’ll update the consolidated Discovery Document and share the traceability matrix linking all requirements to SoW items.

**Martin:** Great work, everyone. This completes the discovery stage. The next milestone is design approval and configuration readiness.

**Priya:** Exciting times ahead!

**Angela:** Finally feels like all our chaos will have a system.

**Karan:** (smiling) That’s the plan. Thanks everyone.