

The logo features the word "salesforce" in a black, lowercase, serif font, positioned inside a light blue, stylized cloud shape. To the right of the cloud is a circular icon with a red border and a diagonal slash, containing the word "SOFTWARE" in black, uppercase, sans-serif font.

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Salesforce.com Certified Sales Cloud Consultant **Study Guide**

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About the Salesforce.com Certified Sales Cloud Consultant Program

The Salesforce.com Certified Consultant program is designed for consultants who have experience implementing Salesforce Sales Cloud solutions in a customer-facing role. The audience has proven experience with the administration and configuration of a Salesforce application, as demonstrated through successful completion of the Salesforce.com Certified Administrator exam. The Salesforce.com Certified Sales Cloud Consultant is able to successfully design and implement Sales Cloud solutions that meet customer business requirements, are maintainable and scalable, and contribute to long-term customer success.

Section 1. Purpose of this Study Guide

This study guide is designed to help you evaluate if you are ready to successfully complete the Certified Sales Cloud Consultant exam. This guide provides information about the target audience for the certification program, the recommended training and documentation, and a complete list of exam objectives—all with the intent of helping you achieve a passing score. Salesforce.com highly recommends a combination of on-the-job experience and self-study to maximize your chances of passing the exam.

Section 2. Audience Description: Salesforce.com Certified Sales Cloud Consultant

A Salesforce.com Certified Sales Cloud Consultant designs and deploys solutions that support customer business processes and requirements using Salesforce applications. The consultant has experience designing solutions that optimize the Sales Cloud functionality and can lead the implementation of these solutions within a customer organization. The consultant has both experience working with sales and marketing organizations and expertise in Salesforce applications, including the knowledge needed to implement multiple applications in common customer scenarios.

The Salesforce.com Certified Sales Cloud Consultant is interested in demonstrating his/her expertise as a cloud computing implementation consultant with a specialty in Salesforce automation. The Salesforce.com Certified Consultant has 2–5 years of experience as a senior business analyst and has developed the skills outlined below:

- Structured skill set for the consulting practice
- Experience with the full project lifecycle of Sales Cloud implementations
- Strong analytical and problem solving skills
- Deep knowledge of the Salesforce product lines
- Solid understanding of Internet technologies and cloud computing
- Solid understanding of data management and database concepts
- Familiarity with software development life cycle
- Ability to:
 - Design and implement successful solutions
 - Anticipate and mitigate risk
 - Meet and manage customer expectations
 - Increase customer confidence
 - Consistently deliver effective business solutions
 - Manage solution delivery and any issues that arise
 - Build solutions that are scalable and maintainable

- Set up change management practices to ensure long-term solution success
- Troubleshoot and resolve issues
- Prioritize and escalate customer issues

Section 3. About the Exam

The Salesforce.com Certified Sales Cloud Consultant exam has the following characteristics:

- Content: 60 multiple-choice/multiple-select questions
- Time allotted to complete the exam: 1 hour and 45 minutes
- Passing score: 72 percent
- Registration fee: USD 200
- References: No hard-copy or online materials may be referenced during the exam
- Prerequisites: Successful completion of the Salesforce.com Certified Administrator exam

Section 4. Recommended Training and References

Salesforce.com Training and Certification recommends experience implementing Sales Cloud solutions for sales and marketing organizations with hands-on practice in the areas listed in the Exam Outline section below as preparation for the exam.

In addition, Salesforce.com Training and Certification recommends the following course as preparation for this exam:

- Online course: Sales Cloud Success: Implementing Sales and Marketing

Other helpful resources:

- Online course: Implementing CRM Essentials
- Online course: Implementing the Sales Cloud
- Online course: Configuring Campaigns to Maximize Your ROI
- Online course: Forecasting for Administrators
- Online course: Forecasting for Sales Reps and Managers
- Online course: Products, Price Books and Assets
- Online course: Introduction to Quotes for Sales Reps
- Online course: Salesforce CRM Content for Administrators
- Online course: Working with Salesforce for Outlook
- Online course: Creating a Salesforce to Salesforce Connection
- Online course: Getting a Head Start with Chatter
- Online course: Getting Started with Data.com
- Online course: Salesforce Mobile
- Implementation Guide: [A Guide to Sharing Architecture](#)
- Implementation Guide: [Campaign Management](#)
- Implementation Guide: [Deploying Territory Management](#)

- Implementation Guide: [Implementing Person Accounts](#)
- Implementation Guide: [International Organizations: Using Multiple Currencies](#)

In addition to the resources above, Salesforce.com Training and Certification recommends studying the online Documentation by searching for topics listed in the Exam Outline section below and fully reviewing all information related to those topics. Online courses, Documentation, Tip Sheets and User Guides can be accessed through the [Help](#) site in your Salesforce CRM application by clicking **Help & Training** in the top-right corner of your screen (requires login).

Documentation is also available in PDF format here: <https://na1.salesforce.com/help/doc/en/sf.pdf>.

Register for instructor-led courses here: <http://www.salesforce.com/training>.

Section 5. Exam Outline

The Salesforce.com Certified Sales Cloud Consultant exam measures a candidate’s knowledge and skills related to the objectives listed below. A candidate should have hands-on experience implementing Sales Cloud solutions and have demonstrated the application of each of the features/functions below.

Objective	Weighting
Industry Knowledge	3%
Explain the factors that influence sales metrics, KPIs, and business challenges	
Explain the concept of and use cases for sales territories	
Implementation Strategies	8%
Given a scenario, determine how to facilitate a successful consulting engagement (plan, gather requirements, design, build, test, and deploy)	
Given a scenario, determine appropriate sales deployment considerations	
Given a scenario, measure the success of an implementation project	
Sales Cloud Solution Design	25%
Given a set of requirements, design a sales process from lead generation to deal closure	
Given a scenario, analyze customer requirements to determine an appropriate solution design, considering capabilities, limitations, and design trade-offs	
Describe the design considerations when implementing a sales process	
Given a scenario, determine when it is appropriate to include custom application development	
Describe the appropriate use cases for account and sales teams and the effect on sales roles, visibility, access, and reporting	
Explain how Salesforce to Salesforce facilitates the exchange of data between Salesforce organizations	
Given a set of KPIs, determine the appropriate sales process solution	
Marketing and Leads	8%
Explain the relationship between the marketing process and the sales process, including campaign influence and ROI	
Given a scenario, recommend the appropriate methods for lead scoring and criteria for lead qualification	
Explain the best practices for managing lead data quality	
Account and Contact Management	15%
Given a scenario, recommend the appropriate method for establishing account or contact records	
Explain how the ownership of account and contact records drives visibility of related sales information, such as opportunities and activities	
Explain the various methods for establishing relationships between accounts and contacts	
Explain the impact of having an account hierarchy	
Explain the methods for populating and maintaining account and contact data using data enrichment tools such as D&B, Hoovers, and Data.com	
Explain the use cases and implications of implementing person accounts	
Opportunity Management	18%

Objective	Weighting
Given a set of requirements, determine how to support different sales process scenarios	
Given a scenario, determine the relationships between sales stages, forecast, and pipeline.	
Describe the relationships between opportunities to assets, product line items and schedules, price books, quotes, contracts, and campaigns	
Given a set of requirements, determine the appropriate forecasting/pipeline solution	
Sales Productivity	10%
Given a scenario, determine the key features that help to enable and measure sales productivity and adoption	
Describe the use cases and considerations for using email and productivity tools such as mobile, Salesforce Offline, and Outlook	
Describe how Chatter enables collaboration in the sales process	
Explain the use cases and best practices for using Content to facilitate the sales process	
Site and Portal Management	3%
Explain the use cases for portals and sites in the sales process	
Identify the impact of enabling a partner portal	
Sales Cloud Analytics	5%
Given a set of desired metrics, determine the appropriate report or dashboard solution, taking into account pipeline, forecasting, productivity, trending, stakeholders, and analytic snapshots	
Describe the impact of multi-currency on reports and dashboards.	
Integration and Data Management	5%
Explain the use cases and considerations for integrations common to Sales Cloud implementations	
Explain the use cases and considerations for data migration in the Sales Cloud	

Section 6. Sample Exam Questions

The following questions are representative of those on the Salesforce.com Certified Sales Cloud Consultant exam. These questions are not designed to test your readiness to successfully complete the certification exam, but should be used to become familiar with the types of questions on the exam. The actual exam questions may be more or less difficult than the questions below.

- Universal Containers was bought by a larger company and needs to provide information on a monthly basis to the new parent company to help predict sales.

Which data should the new parent company review?

 - A. Dashboard of user login history
 - B. Count of new lead records created
 - C. Number of activities tied to opportunities
 - D. Opportunity pipeline report grouped by month

- When the billing address on an account is changed, the mailing address of all related contact records should be updated to reflect the new address.

How can this requirement be met?

 - A. Create a workflow rule on accounts.
 - B. Create a workflow rule on contacts.
 - C. Create a Force.com trigger on accounts.
 - D. Create a Force.com trigger on contacts.

3. Universal Containers is using Salesforce and has set up a private sharing model. Sam is a sales executive who reports to John, a sales manager. Sam has ownership of the ABC Company account record and has created an opportunity for ABC Company. There is a sharing rule that allows the finance team to see all accounts and opportunities.

Which statement is about data visibility is true?

- A. John and Sam can see all of the same data
 - B. John can see all of Sam's data but Sam CANNOT see all of John's data.
 - C. The finance team must be added to the sales team in order to see Sam's opportunity.
 - D. John must be added to the sales team in order to see Sam's opportunity.
4. Universal Containers is expanding sales internationally and has created new price books to handle the various currencies for the five new countries. When a sales representative selects one of the new price books to add a product to an opportunity, there are no products available.

What should be evaluated when troubleshooting this issue?

- A. Confirm that product line items on opportunities are enabled.
 - B. Confirm that the products are shared with the sales representative's role.
 - C. Confirm that the old pricebook is disabled for the sales representative.
 - D. Confirm that the products and currencies are associated with the pricebook.
5. Sales management at Universal Containers needs to provide channel partners with easy access to approved product documentation. They also need to notify partners about the material revisions and updates.

How can they achieve these goals in Salesforce?

- A. Enable Content in the partner portal and enable Content email alerts for partner users.
- B. Enable the Document tab in the partner portal and enable email alerts for partner users.
- C. Add the Content related list to the partner contact page layout and enable content delivery.
- D. Add the Content related list to the partner account page layout and enable content delivery.

Section 7. Answers to Sample Exam Questions

1. D
2. C
3. B
4. D
5. A

Section 8. Maintaining a Certification

Successful completion of online, release-specific Salesforce.com Certified Administrator exams is required to maintain the pre-requisite to the Salesforce.com Certified Sales Cloud Consultant credential. Release exams are published three times a year for each of the Salesforce.com product releases throughout the year.

Successful maintenance of the pre-requisite credential, Salesforce.com Certified Administrator, is required to maintain this credential. An annual maintenance fee of \$100 will be charged when registering for every third release exam, based on when the pre-requisite credential was earned. The maintenance fee includes the three release exams and access to the supporting training material. Salesforce.com Certified professionals will be notified automatically when new release training material and exams become available.



For more information:

Contact your account executive to learn how we can help you accelerate your CRM success.

Corporate Headquarters

The Landmark @ One Market
Suite 300
San Francisco, CA, 94105
United States
1-800-NO-SOFTWARE
www.salesforce.com

Global Offices

Latin America	+1-415-536-4606
Japan	+81-3-5785-8201
Asia/Pacific	+65-6302-5700
EMEA	+4121-6953700