



Certification Exam Guide

# SALESFORCE CERTIFIED SALES CLOUD CONSULTANT

Spring '18

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## **ABOUT THE SALESFORCE CERTIFIED SALES CLOUD CONSULTANT PROGRAM**

The Salesforce Certified Sales Cloud 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 Certified Administrator exam. The Salesforce Certified Sales Cloud Consultant is able to successfully design and implement maintainable and scalable Sales Cloud solutions that meet customer business requirements, and contribute to long-term customer success.

## SECTION 1. PURPOSE OF THIS EXAM GUIDE

This exam guide is designed to help you evaluate your readiness to successfully complete the Certified Sales Cloud Consultant exam. It also provides information about the target audience for the certification program, recommended training and documentation, and a complete list of exam objectives—all with the intent of helping you achieve a passing score. Salesforce 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 CERTIFIED SALES CLOUD CONSULTANT

A Salesforce 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 experience working with sales and marketing organizations and has expertise in Salesforce applications, including the knowledge needed to implement multiple applications in common customer scenarios.

Salesforce Certified Sales Cloud Consultants are interested in demonstrating their expertise as cloud computing implementation consultants; with a specialty in Salesforce automation. The Salesforce 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 Certified Sales Cloud Consultant exam has the following characteristics:

- Content: 60 multiple-choice/multiple-select questions\* (5 unscored questions will be added)
- Time allotted to complete the exam: 105 minutes (time allows for unscored questions)
- Passing score: 68%
- Registration fee: USD 200, plus applicable taxes as required per local law
- Retake fee: USD 100, plus applicable taxes as required per local law
- References: No hard-copy or online materials may be referenced during the exam.
- Delivery options: Proctored exam delivered onsite at a testing center or in an online proctored environment. Click [here](#) for information on scheduling an exam.
- Prerequisite: Salesforce Certified Administrator credential
- Please note: When evaluating questions and answers, please consider all currently available features including those available in either Lightning Experience or Salesforce Classic.

\*Please note that as of November 16, 2017, all Salesforce certification exams will contain five additional, randomly placed, unscored questions to gather data on question performance. The duration of each exam has been evaluated and adjusted to accommodate the inclusion of the unscored questions. These five questions will be in addition to the 60 scored questions on your exam, and will have no impact whatsoever on your score.

## SECTION 4. RECOMMENDED TRAINING AND REFERENCES

As preparation for this exam, Salesforce recommends a combination of: hands-on experience, training course completion, Trailhead trails, and self-study in the areas listed in the Exam Outline section of this exam guide.

To access the most comprehensive training list, download a copy of our Salesforce Guide to Certification available [here](#).

To enroll in instructor-led courses and launch online training from your Salesforce application, click the **Help & Training** link in the upper right corner of the screen (requires login) and search for the desired courses. Non-Salesforce customers can register for instructor-led courses [here](#).

Instructor-Led Training recommended for this exam:

- Instructor-led course: Preparing for Your Salesforce Sales Cloud Consultant Certification (CRT-251)

To review online Documentation, Tip Sheets, and User Guides – search for the topics listed in the Exam Outline section of the exam guide and study the information related to those topics. Documentation, Tip Sheets, and User Guides can also be accessed through **Help & Training**.

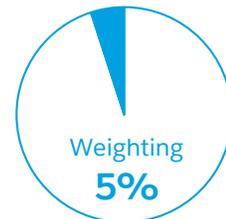
Trailhead trails can be accessed [here](#).

## SECTION 5. EXAM OUTLINE

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

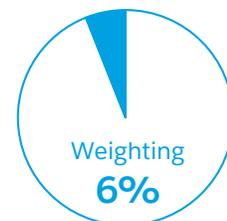
### INDUSTRY KNOWLEDGE

- Explain the factors that influence sales metrics, KPIs and business challenges.
- Explain common sales processes and key considerations.



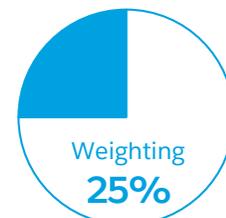
### IMPLEMENTATION STRATEGIES

- Given a scenario, determine how to facilitate a successful consulting engagement (plan, gather requirements, design, build, test, and document).
- Given a scenario, determine appropriate sales deployment considerations.
- Given a scenario, measure the success of a Sales Cloud implementation project.



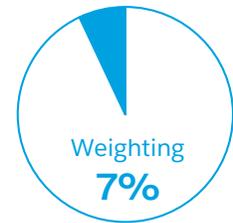
### SALES CLOUD SOLUTION DESIGN

- Given a set of requirements, design an end-to-end sales process from lead to opportunity to quote to close to order.
- Given a scenario, analyze customer requirements to determine an appropriate solution design considering capabilities, limitations, and design trade-offs.
- Given a scenario, identify an appropriate approach when designing the lead conversion process.
- Describe the implementation considerations when designing a sales process. (validation rules, process builder, automation, record types, page layouts, workflow, Visualflow and triggers).
- Given a scenario, determine when it is appropriate to include custom application development or a third-party application.
- Describe the appropriate uses cases for Account and Opportunity Teams and the effect on sales roles, visibility, access, and reporting.
- Explain the capabilities and use cases for Enterprise territory management.
- Explain the capabilities, use cases and design considerations when implementing Orders.
- Explain the capabilities, use cases and design considerations of Salesforce mobile applications pertinent to the sales process.



## MARKETING AND LEADS

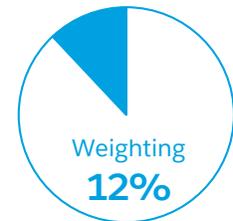
- Explain how marketing capabilities support the sales process.
- Given a scenario, recommend appropriate methods for lead scoring and criteria for lead qualification.
- Explain the best practices for managing lead data quality.



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## ACCOUNT AND CONTACT MANAGEMENT

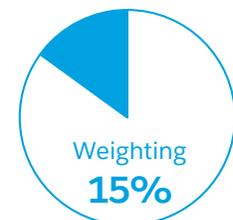
- Identify use cases and design considerations for social accounts and contacts.
- Explain how the ownership of account and contact records drive visibility of related sales information such as opportunities, activities, etc.
- Explain the various methods for establishing relationships between accounts 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.
- Explain the use cases and implications for implementing person accounts.



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## OPPORTUNITY MANAGEMENT

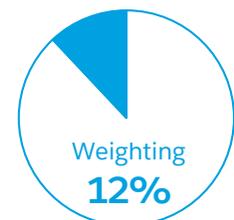
- Given a set of requirements, determine how to support different sales process scenarios.
- Given a scenario, determine the relationships between sales stages, forecast and pipeline.
- Describe the relationships between opportunities to assets, product line items and schedules, price books, quotes, contracts, campaigns, etc.
- Given a set of requirements, determine the appropriate forecasting solution.
- Describe the impact of multi-currency on opportunities.



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## SALES PRODUCTIVITY

- Given a scenario, determine the key features that help to enable and measure sales productivity and adoption.
- Identify use cases and considerations for using email and productivity tools.
- Given a scenario, identify the appropriate mobile solution to improve sales productivity.
- Describe how Chatter enables collaboration in the sales process.

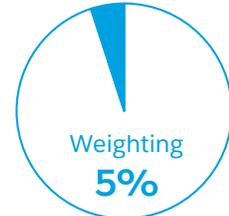


- Explain the use cases and best practices for using Content vs. Chatter Files in the sales process.
- Explain the capabilities and use cases of work.com pertinent to sales productivity.

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## COMMUNITIES AND SITE MANAGEMENT

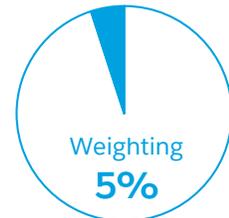
- Explain the use cases for Communities and sites in the sales process. (Customer, Partner, Ideas, Force.com Sites, etc.).
- Identify the impact of enabling Communities.



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## SALES CLOUD ANALYTICS

- Given a set of desired metrics, determine the appropriate report, dashboard or reporting snapshot solution.
- Describe the implementation considerations of multi-currency on reports and dashboards.



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## INTEGRATION AND DATA MANAGEMENT

- Explain the use cases and considerations for integrations common to Sales Cloud implementations.
- Explain the use cases and considerations for data migration in Sales Cloud.
- Given a scenario, analyze the implications and design considerations of large data and transaction volumes.



## SECTION 6. SAMPLE EXAM QUESTIONS

The following questions are representative of those on the Salesforce 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 this set of questions.

1. 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?

*Choose one answer*

- 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

2. 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?

*Choose one answer*

- A. Create a workflow rule on accounts.
- B. Create a workflow rule on contacts.
- C. Create a process on accounts using Process Builder.
- 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 about data visibility is true?

*Choose one answer*

- 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?

*Choose one answer*

- 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 price book is disabled for the sales representative.
  - D. Confirm that the products and currencies are associated with the price book.
5. Sales management at Universal Containers needs to provide channel partners with easy access to approved product documentation. Sales Management also needs to notify partners about the material revisions and updates.

How can Sales Management achieve these goals in Salesforce?

*Chose one answer*

- A. Enable Content in the Partner Community and enable Content email alerts for partner users.
- B. Enable the Document tab in the Partner Community 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

One of the benefits of holding a Salesforce credential is always being up to date on new product releases. Our release exams are designed to ensure you have the latest information you need to be a successful Salesforce Certified expert.

Bookmark these useful resources for maintaining your credentials:

- [Maintenance Exam Due Dates](#)
- [Credential Status Request Overview](#)
- [Overall Maintenance Requirements](#)

**Don't let your hard-earned credential expire!** Once you earn the credential, if you do not complete all maintenance requirements by the due date, your credential will expire, or in some cases, become suspended. For more information, click [here](#).

### ABOUT TRAILHEAD

Trailhead is your path into the Salesforce economy. It's the fun way to learn the skills you need to transform your company, earn credentials that grow your career, and connect with a global movement of Trailblazers to continue learning together.

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