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# Question 1

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**Question Type:** MultipleChoice

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How can a consultant determine which capabilities of a Sales Cloud implementation are required during the Discovery phase?

## Options:

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- A- Establish KPIs for end MTV.
- B- Observe end users.
- C- Demo Sales Cloud to end users.

## Answer:

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B

## Explanation:

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During the Discovery phase, observing end users helps consultants understand how users interact with the current system, identify pain points, and determine which capabilities of a Sales Cloud implementation are required. By directly observing the workflow and usage patterns, consultants can gather valuable insights into user needs and requirements, ensuring that the implementation aligns with actual business processes.

Discovery Phase Best Practices

Understanding User Needs through Observation

## Question 2

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**Question Type:** MultipleChoice

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Cloud Kicks sales reps want to see all of the details on their current opportunities with a minimal amount of navigation or clicks to cycle through them.

Which functionality should the consultant recommend?

### **Options:**

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- A-** Develop a new Sales Console app including opportunities.
- B-** Select the Split View option from the My Opportunities list view.
- C-** Create a dashboard with reports on My Opportunities.

### **Answer:**

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B

### **Explanation:**

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The Split View option in Salesforce allows users to see a list of records on the left side of the screen while viewing the details of a selected record on the right side. This functionality minimizes navigation and clicks, enabling sales reps to efficiently cycle through their current opportunities and view all the details they need. It is designed to enhance productivity by providing quick access to information.

[Using Split View](#)

[Salesforce List Views and Split View](#)

## **Question 3**

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**Question Type:** MultipleChoice

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After Cloud Kicks implemented Sales Cloud Einstein, a consultant realizes they are unable to activate all of the features.

Which step should the consultant take to troubleshoot the issue?

**Options:**

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- A- Check the Soles Insights Integration User profile configuration.
- B- Reconfigure the Einstein Lead Scoring app.
- C- Confirm users have the feature license assigned.

**Answer:**

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C

**Explanation:**

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To troubleshoot the issue of not being able to activate all Sales Cloud Einstein features, the consultant should confirm that users have the necessary feature licenses assigned. Without the appropriate licenses, users will not be able to access or activate certain Einstein functionalities. Ensuring that all required licenses are correctly assigned is a crucial step in enabling full functionality.

[Sales Cloud Einstein License Management](#)

[Assigning Feature Licenses](#)

## Question 4

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**Question Type:** MultipleChoice

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A consultant received feedback that various sales teams are providing inconsistent updates to leadership about the progress of deals.

What should the consultant recommend for aligning processes and providing more reliable information about the pipeline to leadership?

**Options:**

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**A-** Create a Sales Engagement report.

**B-** Customize Sales Path.

**C-** Enable Sales Forecasting.

**Answer:**

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C

**Explanation:**

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Enabling Sales Forecasting helps provide consistent updates and reliable information about the pipeline to leadership. Salesforce's Sales Forecasting feature allows sales teams to predict and plan for future sales outcomes based on current pipeline data. It aligns processes by standardizing how sales data is reported and ensures that all teams are using the same criteria and metrics for reporting progress on deals.

[Sales Forecasting Overview](#)

## Question 5

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**Question Type:** MultipleChoice

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The consultant at Cloud Kicks has successfully implemented Einstein Lead Scoring. The VP of sales wants to see the effectiveness of this new functionality.

What should the consultant do to fulfill this request?

### Options:

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- A- Add the Einstein prediction column to the forecast list view.
- B- Add a standard dashboard for Sales Cloud Einstein.
- C- Create a custom report type for Sales Cloud Einstein records.

### Answer:

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B

## **Explanation:**

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Adding a standard dashboard for Sales Cloud Einstein is the best approach to showcase the effectiveness of Einstein Lead Scoring. Salesforce provides pre-built Einstein Analytics dashboards that offer insights into lead scoring performance, helping the VP of sales visualize how lead scoring impacts the sales process. These dashboards include metrics and trends that demonstrate the value and accuracy of the Einstein Lead Scoring implementation.

[Sales Cloud Einstein Analytics](#)

[Einstein Analytics Dashboard for Lead Scoring](#)

## **Question 6**

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**Question Type: MultipleChoice**

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Cloud Kicks (CK) is starting to plan its first Salesforce Release. CK would like to put together a comprehensive preview of the release to communicate the upcoming changes and new features to the leadership team, stakeholders, and end users. CK has asked a consultant for

guidance.

Which option should the consultant recommend?



**Options:**

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A- Release Matrix

B- Release Notes

C- Release in a Box

**Answer:**

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C

**Explanation:**

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'Release in a Box' is a comprehensive communication tool provided by Salesforce to help organizations prepare for upcoming releases. It includes presentations, feature summaries, and other resources to effectively communicate changes and new features to leadership teams, stakeholders, and end users. This option provides a structured approach to preview and plan for new releases, ensuring that all parties are well-informed and prepared.

[Release in a Box](#)

[Preparing for Salesforce Releases](#)

## Question 7

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**Question Type: MultipleChoice**

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A consultant is meeting with a new client to design a rollout strategy for its Sales Cloud implementation.

What should the consultant do during the planning stage to ensure a successful implementation?

**Options:**

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- A- Design a prototype of the suggested solution.
- B- Identify which Salesforce features and functions to use.
- C- Define goals, metrics, project schedule, and sales processes.

**Answer:**

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C

**Explanation:**

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During the planning stage, it is crucial to define clear goals, metrics, project schedule, and sales processes. This ensures that all stakeholders have a shared understanding of the project objectives, timelines, and success criteria. Defining these elements provides a structured framework for the implementation and helps in tracking progress and addressing issues proactively.

## Question 8

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**Question Type:** MultipleChoice

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Cloud Kicks (CK) is adding hundreds of new accounts to Sales Cloud daily. CK uses an automated process to assign Account owners. If no assignment can be made for an account, it will be routed to a specific user who will manually review and re-assign it at a later date. This user may have thousands of account records assigned.

Which solution should the consultant recommend when CK sets up the new account process?

### Options:

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- A-** Place the user in a separate role at the highest level of the role hierarchy.
- B-** Add the user to a separate role at the lowest level of the role hierarchy.
- C-** Assign the Modify All Data permission to the user.

### Answer:

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B

**Explanation:**

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Adding the user to a separate role at the lowest level of the role hierarchy ensures that the manual reviewer does not inadvertently gain access to other users' accounts through role hierarchy-based sharing rules. This setup confines the user's access to only those records explicitly assigned to them, maintaining data security and ensuring proper access control.

[Role Hierarchy Best Practices](#)

[Managing User Permissions](#)

## Question 9

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**Question Type:** MultipleChoice

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The Cloud Kicks sales team travels frequently and often needs to convert leads while away from the home office.

What should a consultant recommend?

**Options:**

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- A-** Enable Conversions for the Salesforce mobile app in Lead Conversion settings.
- B-** Create a Global Action to convert leads via the Salesforce mobile app.
- C-** Install an AppExchange package to convert leads via the Salesforce mobile app.

**Answer:**

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B

**Explanation:**

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Creating a Global Action to convert leads via the Salesforce mobile app allows sales reps to efficiently convert leads while on the go. This approach ensures that the functionality is easily accessible from the mobile interface, streamlining the lead conversion process for sales reps who are frequently traveling.

[Global Actions Overview](#)

[Setting Up Global Actions](#)

## Question 10

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**Question Type:** MultipleChoice

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At a kickoff meeting for a new project, a consultant starts gathering information to be used in the project implementation plan. They ask the participants to define what project success will look like.

Which strategy is the consultant using?

**Options:**

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A- Design Direction

B- Challenge Framing

C- Discovery

**Answer:**

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C

**Explanation:**

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During the discovery phase of a project, a consultant gathers information to understand the client's needs, objectives, and definitions of success. Asking participants to define what project success will look like is a key part of the discovery process, as it helps establish clear goals and expectations for the project implementation plan.

[Discovery Phase in Salesforce Projects](#)

## Question 11

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**Question Type:** MultipleChoice

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Sales reps at Cloud Kicks (CK) often receive important customer emails they want to log as records related to Contacts in Salesforce. CK has Office 365, as well as a policy that prevents users from installing anything directly on their computers.

Which solution should a consultant recommend to meet this requirement?

### Options:

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- A- Einstein Activity Capture
- B- Salesforce Inbox
- C- Lightning Console for Sales

### Answer:

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A

## **Explanation:**

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Einstein Activity Capture is a solution that automatically syncs emails and events between a user's email and Salesforce without requiring any software to be installed on the user's computer, making it compatible with CK's policy. It works with Office 365 and ensures that important customer emails are logged as records related to Contacts in Salesforce, providing an efficient and policy-compliant solution.

[Einstein Activity Capture Overview](#)

[Set Up Einstein Activity Capture](#)

## **Question 12**

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**Question Type:** MultipleChoice

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The Cloud Kicks pipeline and forecasting reports are inaccurate because sales reps are creating opportunities after they are already closed won. Sales management wants visibility into how often the sales reps are creating these types of opportunities.

Which solution should the consultant recommend?

**Options:**

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- A- implement automation to update the opportunity to the first stage in the sales process.
- B- Configure a report that displays opportunities that have an earlier closed date than
- C- Run the opportunity Pipeline line standard report to view the upcoming opportunities by stage.

**Answer:**

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B

**Explanation:**

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To provide visibility into how often sales reps are creating opportunities after they are already closed won, the best solution is to configure a report that displays opportunities with a closed date earlier than the created date. This report will highlight any discrepancies where opportunities are being backdated, allowing sales management to monitor and address this issue directly.

[Reporting on Opportunity History](#)

[Creating Reports to Monitor Sales Activities](#)

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