Free Questions for Sales-Cloud-Consultant

Shared by Suarez on 04-10-2024

For More Free Questions and Preparation Resources

Check the Links on Last Page

Question 1

Question Type: **MultipleChoice**

A sales rep at Cloud Kicks must have access to all child accounts of the accounts they own. The organization-wide default setting for Account Is Private.

What happens if a sales rep has access to a parent account?

Options:

A- Access to child account records needs to be shared manually.

B- Access to child account records Is granted via the Account Hierarchy.

C- Access to child account records is controlled by default Account Teams.

Answer:

A

Explanation:

In Salesforce, when the organization-wide default (OWD) setting for Account is Private, access to child account records does not automatically inherit from parent account access. Therefore, if a sales rep has access to a parent account, they do not automatically get access to the child accounts. Access to child account records needs to be shared manually through sharing rules, role hierarchy, or manually sharing the records.

Understanding Sharing Settings

Account Hierarchies and Sharing

Question 2

Question Type: **MultipleChoice**

A consultant is initiating a Sales Cloud project for Cloud Kicks.

Which essential action should the consultant prioritize to ensure successful implementation and adoption?

Options:

A- Design end user training plan.

B- Set project milestones and establish key performance indicators (KPIs).

C- Develop Quality Assurance (QA) testing scripts.

Answer:

B

Explanation:

Setting project milestones and establishing key performance indicators (KPIs) is crucial for ensuring successful implementation and adoption of a Sales Cloud project. This approach provides a clear roadmap for the project, helps in tracking progress, ensures accountability, and measures success against defined objectives. Milestones and KPIs guide the project team and stakeholders through the implementation process, ensuring that each phase is completed as planned and that the project's goals are met.

Project Management for Salesforce Implementations

Defining and Measuring KPIs

Question 3

Question Type: MultipleChoice

The Sales Cloud implementation at Cloud Kicks (CK) is now live. End user training is complete. IT stakeholders have signed off on the technical aspects of the project. The CK admin continues to call the consultant with questions about the sales process.

What should the consultant do?

Options:

A- Suggest that CK purchase a support agreement.

B- Conduct a knowledge transfer with the admin.

C- Recommend that the admin attend Salesforce instructor-led training.

Answer:

B

Explanation:

A knowledge transfer is essential to ensure that the Cloud Kicks admin is fully equipped to manage the Sales Cloud implementation post-go-live. This process involves detailed discussions, documentation, and training sessions to cover any gaps in understanding and to ensure the admin can handle day-to-day operations and troubleshoot issues. It also fosters independence and confidence in managing the system.

Knowledge Transfer Best Practices

Salesforce Training and Adoption

Question 4

Question Type: **MultipleChoice**

Annual sales numbers change depending on renewal periods and new products. Sales managers at Universal Containers (UC) want to emphasize the importance of customer retention when prioritizing the pipeline and customer engagement for the sales team.

Which metric should the consultant recommend to help UC emphasize the importance of customer retention to the overall business strategy?

Options:

A- Total pipeline Value

B- Customer Lifetime Value (CLV)

C- Annual Contract Value (ACV)

Answer:

B

Explanation:

Customer Lifetime Value (CLV) is a key metric that helps organizations understand the long-term value of a customer relationship. It emphasizes the importance of customer retention by measuring the total revenue a business can reasonably expect from a single customer account throughout the business relationship. For Universal Containers, focusing on CLV will help sales managers prioritize customer engagement and retention strategies, highlighting the ongoing value of maintaining strong customer relationships over simply acquiring new customers.

Customer Lifetime Value (CLV) in Salesforce

Metrics for Customer Retention

Question 5

Question Type: MultipleChoice

Sales managers at Cloud Kicks need to show reports and dashboards with Opportunity Forecast by Product family with team Quotas.

Which solution should a consultant recommend?

Options:

A- Create a Joined report with dosed Opportunities, Forecasting Items, and Quotas.

B- Configure Quotas with a Product family report and add necessary fields.

C- Create a custom report type with Forecasting Quotas and Forecasting Items.

Answer:

C

Explanation:

To show reports and dashboards with Opportunity Forecast by Product family with team Quotas, creating a custom report type that includes Forecasting Quotas and Forecasting Items is the recommended solution. This custom report type allows sales managers to generate detailed reports that combine information about forecasted opportunities and the quotas set for the team, providing a comprehensive view of performance by product family.

Custom Report Types

Forecasting in Salesforce

Question 6

Question Type: **MultipleChoice**

Cloud Kicks (CK) has organization-wide defaults set to Public Read-Only for Opportunity. One of the Account Team roles at CK Is Executive Sponsor. Account Team members with the Executive Sponsor rote need Read/Write access to all child Opportunities.

How should the consultant meet the requirement?

Options:

A- Create an Opportunity snaring rule to grant Read/ Write access to Opportunities.

B- Create a flow to grant Read/Write access to Opportunities.

C- Create an Account sharing rule to grant Read/Write access to Opportunities.

Answer:

A

Explanation:

To meet the requirement of granting Read/Write access to child Opportunities for Account Team members with the Executive Sponsor role, an Opportunity sharing rule should be created. Sharing rules in Salesforce allow you to automatically extend access to users based on their roles or other criteria. In this case, the sharing rule would be configured to provide Read/Write access to Opportunities for those in the Executive Sponsor role on the Account Team.

Sharing Rules Overview

Create and Edit Sharing Rules

Question 7

Question Type: **MultipleChoice**

The admin at Cloud Kicks recently implemented Sales Cloud and needs to understand the adoption of Lightning Sales Console.

Options:

A- Run the Salesforce Optimizer.

B- Open the Lightning Usage App.

C- Create a custom report.

Answer:

B

Explanation:

The Lightning Usage App in Salesforce provides insights into how users are adopting and using the Lightning Experience, including the Lightning Sales Console. It includes metrics such as daily active users, most visited pages, and feature usage. This tool is specifically designed to help administrators and consultants understand adoption patterns and areas that may need attention or additional training.

Lightning Usage App Overview

Monitor Adoption with the Lightning Usage App

Question 8

Question Type: **MultipleChoice**

Northern Trail Outfitters launched Salesforce for its EMEA subsidiary 3 months ago and wants to gain insight into usage.

Which option should a consultant recommend to meet this requirement?

Options:

A- Analyze the Setup Audit Trail to determine the number of logins per day.

B- Create and subscribe to a custom report of active users by role.

C- Install the Salesforce Adoption Dashboard from AppExchange.

Answer:

C

Explanation:

The Salesforce Adoption Dashboard available on the AppExchange provides a comprehensive set of reports and dashboards designed to help organizations monitor and increase Salesforce adoption. It includes metrics on user logins, feature usage, and data quality, making it an effective tool for gaining insights into how users are engaging with Salesforce. This solution is specifically recommended for tracking usage and adoption metrics, making it a better fit than the other options.

Salesforce Adoption Dashboards on AppExchange

Measuring User Adoption

Question 9

Question Type: **MultipleChoice**

Universal Containers has implemented a lead qualification process that uses a lead scoring formul

a. Upon review, many of the converted leads with the highest scores had little interest in making a purchase.

Which modification to the current lead qualification process should a consultant recommend?

Options:

A- Include a measure for the number of marketing touches.

B- Increase points for actions that Indicate intent.

C- Evaluate each record against the target marketing persona.

Answer:

C

Explanation:

When converted leads with high scores show little interest in purchasing, it indicates that the lead scoring model may not be accurately reflecting true purchase intent. Evaluating each record against the target marketing persona involves comparing the characteristics of the lead to an ideal customer profile, which helps in ensuring that the scoring is more aligned with actual buying intent. By refining the lead qualification process to better match the target persona, sales teams can prioritize leads that are more likely to convert into customers.

Improving Lead Scoring with Personas

Lead Management Best Practices

Question 10

Question Type: MultipleChoice

Cloud Kicks wants to enable sales reps to view an Individual team member's split percentage when the split percentage is less than 100% of the revenue amount.

Which attribution method should the consultant recommend?

Options:

A- Opportunity Percentage Split

B- Opportunity Overlay Split

C- Opportunity Amount Split

Answer:

A

Explanation:

The Opportunity Percentage Split method in Salesforce allows for revenue sharing among team members. Each member can be assigned a specific percentage of the revenue. This method is ideal when the split percentage is less than 100% of the revenue amount because it allows for granular control over how revenue is distributed among team members. According to Salesforce documentation, Opportunity Splits can be set up to reflect different sales scenarios, including revenue recognition and compensation. The Opportunity Percentage Split method specifically supports scenarios where splits add up to less than 100%.

Salesforce Opportunity Splits Overview

Setting Up Opportunity Splits

Question 11

Question Type: MultipleChoice

Cloud Kicks wants to assign territories in bulk to Opportunities.

What should the consultant do to meet the requirement?

Options:

A- Update Opportunity sales team with territory assignments.

B- Schedule auto-assignment rules in the territory model.

C- Run the filter-based Opportunity territory assignment.

Answer:

C

Explanation:

To assign territories in bulk to Opportunities, the consultant should run the filter-based Opportunity territory assignment. This feature allows users to apply territory assignments to a large number of opportunities based on specified criteria or filters. This method is efficient for bulk assignments and ensures that opportunities are accurately aligned with the appropriate territories based on predefined rules and conditions.

Question 12

Question Type: **MultipleChoice**

Cloud Kicks (CK) is planning to use Person Accounts to maintain information on its retail customers. CK likes to track connections among customers to capture household relationships, referrals, and so on. One customer can have many relationships.

What should a consultant consider when implementing Person Accounts and supporting many relationships between customers in Salesforce?

Options:

A- Use Contacts for retail customers and use Accounts to maintain relationships.

B- Enable Contacts to Multiple Accounts to create indirect relationships between two or more Person Accounts.

C- Create a custom field to establish relationship and create files among Person Accounts.

Answer:

B

Explanation:

When implementing Person Accounts and supporting many relationships between customers in Salesforce, the consultant should consider enabling Contacts to Multiple Accounts. This feature allows for the creation of indirect relationships between two or more Person Accounts, which is ideal for tracking household relationships, referrals, and other connections. It provides a flexible way to manage complex relationships without needing to create custom fields or objects.