

Free Questions for CRT-251

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Question 1

Question Type: MultipleChoice

Universal Containers (UC) does business with a contact associated with a specific account with the contact role of executive. The contact is also on the board of a nonprofit that has requested a charitable donation from UC. UC wants to track the contact on both accounts.

What is the most efficient solution that the consultant should implement to meet the requirement?

Options:

- A- Create a new lookup field on the Contact record.
- B- Create a new Contact record related to the nonprofit account.
- C- Enable the Contact to Multiple Accounts feature.

Answer:

C

Explanation:

The 'Contact to Multiple Accounts' feature in Salesforce allows a single contact to be associated with multiple accounts without the need to duplicate the contact record. This is particularly useful for tracking relationships where a contact has roles in multiple organizations, such as in this scenario where the contact is associated with both a business account and a nonprofit. Enabling this feature provides an efficient solution to manage complex relationships.

[Contacts to Multiple Accounts](#)

[Enable Contacts to Multiple Accounts](#)

Question 2

Question Type: MultipleChoice

A consultant is addressing Cloud Kicks' performance measurement needs and overcoming challenges within Sales Cloud. Which approach should a consultant adopt?

Options:

- A-** Rely on general industry standards to determine performance measurement criteria and system architecture.
- B-** Collaborate closely with the customer to discern their specific performance measurement requirements.

C- Implement standardized performance measurement practices to ensure consistency across Sales Cloud.

Answer:

B

Explanation:

When addressing performance measurement needs, it is crucial for a consultant to collaborate closely with the customer to understand their specific requirements. Each organization has unique goals, challenges, and metrics that are important to them. By working closely with the customer, the consultant can tailor the performance measurement criteria and system architecture to meet their specific needs, ensuring the implementation is aligned with the customer's business objectives.

[Understanding Customer Requirements](#)

[Sales Cloud Implementation Best Practices](#)

Question 3

Question Type: MultipleChoice

In a recent management meeting, the VP of sales voiced concern over the current economic environment. To better understand the effectiveness of its marketing efforts, the VP expressed a need to monitor and reduce churn going forward.

Which strategy should a consultant recommend to address the VP's concern?

Options:

- A- Create a Historical Trending report.
- B- Create an average stage duration by Opportunity report.
- C- Create a year over year sales by Account report.

Answer:

A

Explanation:

To monitor and reduce churn effectively, creating a Historical Trending report is recommended. Historical Trending in Salesforce allows you to track changes over time, providing insights into how different factors are affecting churn rates. This type of report helps in understanding trends in customer behavior and the effectiveness of marketing efforts, enabling the VP of sales to make informed decisions to reduce churn.

Question 4

Question Type: MultipleChoice

The Cloud Kicks global sales team has asked for a simpler way to view and manage its opportunity pipeline. The team is often responsible for hundreds of deals at a time across multiple countries and currencies. The sales reps have suggested using the Kanban view.

What is a consideration when using the Kanban view?

Options:

- A-** It can roll-up summary fields for Currency fields.
- B-** It can summarize records by Currency fields.
- C-** It can display up to 10 fields per card.

Answer:

B

Explanation:

The Kanban view in Salesforce is a visual summary of records in a list view. It allows sales teams to manage their opportunity pipeline by providing a column-based layout where each card represents a record. One important consideration when using the Kanban view is that it can summarize records by Currency fields, which is particularly useful for global sales teams dealing with multiple currencies. This feature helps in quickly understanding the distribution and totals of opportunities across different currencies.

[Kanban View in Salesforce](#)

[Managing Opportunities with Kanban](#)

Question 5

Question Type: MultipleChoice

It is challenging for the sales operations team to provide Universal Containers with accurate and insightful reports due to the poor quality and high volume of Account, Contact, and Lead data.

a. As the team performs data cleansing, productivity has been impacted, leading to inefficiency and low adoption.

What should the consultant do first?

Options:

- A- Create a data management plan and a data quality dashboard.
- B- Install and configure a data cleansing app from AppExchange.
- C- Use Duplicate Rules to identify and report data quality issues.

Answer:

A

Explanation:

The first step to addressing poor data quality and high volume issues is to create a data management plan and a data quality dashboard. A data management plan outlines the processes and responsibilities for maintaining data quality, including data cleansing and validation procedures. A data quality dashboard provides visibility into data quality issues, helping the team monitor and address them proactively. This approach helps improve data accuracy and enables the sales operations team to produce more reliable and insightful reports, enhancing overall efficiency and adoption.

[Data Quality Management](#)

[Creating Data Quality Dashboards](#)

Question 6

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 7

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](#)

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