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Salesforce Certified Sales Cloud Consultant Sample Questions (Q12-Q17):

NEW QUESTION # 12

The Discovery phase with Cloud Kicks (CK) has just ended.

CK wants a visual way to see how the new business processes will work. CK's process is complex and requires multiple slides. What should the consultant create to provide this high-level view?

- **A. Universal Process Notation**
- B. Value Stream Map
- C. Capability Model

Answer: A

Explanation:

After the Discovery phase, Cloud Kicks (CK) wants a visual representation of how the new complex business processes will work, requiring multiple slides. The consultant should create a diagram using Universal Process Notation (UPN).

Key Points:

- * **Universal Process Notation (UPN):** UPN is a simple, user-friendly way to map business processes. It provides a standardized method to document complex processes in a clear and understandable format.
- * **Visual Representation:** UPN uses simple flowcharts and diagrams to represent processes, making it easier for stakeholders to visualize and understand complex workflows.
- * **Scalability:** UPN is suitable for representing both high-level overviews and detailed process steps, accommodating the complexity and multiple slides required by CK.
- * **Communication Tool:** By presenting the processes in UPN, the consultant can effectively communicate how the new processes will function within the organization.

Why Other Options Are Less Suitable:

- * **A. Value Stream Map:** This method focuses on analyzing and improving the flow of materials and information required to bring a product or service to a consumer. It is more suited for process improvement rather than providing an overall visual representation of new processes.
- * **C. Capability Model:** A Capability Model provides a high-level view of what an organization does (its capabilities), not how processes work. It is less suitable for showing detailed or complex processes.

Salesforce Sales Cloud References:

- * **Business Process Mapping:** While Salesforce does not prescribe a specific notation for process mapping, it emphasizes the importance of clear and effective communication of business processes during implementation.
- * **Process Visualization Tools:** Salesforce partners and consultants often use various process mapping techniques, including UPN, to document and communicate business processes.
- * **Change Management:** Effective documentation of processes is critical for user adoption and change management, as outlined in Salesforce's Change Management Best Practices.

By creating diagrams using Universal Process Notation, the consultant can provide CK with a visual, comprehensive, and understandable representation of the new complex business processes.

NEW QUESTION # 13

Cloud Kicks is restructuring its sales teams to align with its product lines. Each sales rep will focus only on the accounts they've been assigned.

Sales reps will run specific product upsell processes.

Which action should the consultant take to support a successful sales team transition?

- **A. Meet with territory sales leadership to design territory assignment rules.**
- B. Meet with sales reps to review products they are assigned and implement Opportunity Teams.
- C. Meet with executive sales leadership to understand the requirements for record sharing.

Answer: A

Explanation:

To support the transition to product-line-based sales teams, the consultant should meet with territory sales leadership to design territory assignment rules. Here's why:

- * **Territory Management:** Salesforce's Territory Management functionality allows organizations to define rules that assign accounts to specific sales reps based on criteria like product lines. By meeting with leadership, the consultant can ensure that territory assignments align with CK's restructuring goals.
- * **Alignment with Sales Strategy:** Territory assignment rules can be customized to focus sales reps on the specific accounts they are responsible for, ensuring the reps only see and work on the accounts within their designated territory.
- * **Salesforce Best Practices:** Engaging with territory leadership ensures that territory assignment rules align with business strategies,

helping facilitate a smooth transition and effective realignment of sales teams.

* References: More details can be found in Salesforce documentation on Enterprise Territory Management, which explains how to create and manage territory assignments effectively.

In summary, meeting with territory sales leadership to design territory assignment rules (Option A) will enable a successful sales team transition by aligning with Cloud Kicks' new sales structure.

NEW QUESTION # 14

Access to Opportunities at Cloud Kicks should be restricted.

Sales users should only have access to two categories of Opportunities:

* Opportunities they own

* Opportunities that are tied to accounts they own

Which action should a consultant take to meet the requirement?

- A. Set organization-wide defaults for Accounts and Opportunities to Private.
- **B. Set Opportunity access on the role to View All Opportunities associated with the owner's accounts.**
- C. Set organization-wide defaults for Accounts and Opportunities to Public Read- Only.

Answer: B

Explanation:

To restrict access to opportunities such that sales users can only access:

* Opportunities they own

* Opportunities tied to accounts they own

The consultant should set the Opportunity access on the role hierarchy to "View All Opportunities associated with the accounts they own." Key Points:

* Organization-Wide Defaults (OWD): Setting OWD for Accounts and Opportunities to Private ensures that users cannot access records they don't own unless granted through sharing rules or role hierarchy.

* Role Hierarchy Settings: Adjusting the role hierarchy allows users to access opportunities associated with accounts they own, even if they don't own the opportunity records themselves.

* Opportunity Access on Roles:

* Navigate to Setup > Roles.

* Edit the relevant sales roles.

* In the "Opportunity Access" section, select "Users in this role can view all opportunities associated with accounts they own."

* Controlled Access: This configuration ensures that users see only the opportunities they own and those tied to their accounts, aligning with the requirement.

Salesforce Sales Cloud References:

* Role Hierarchy and Sharing Settings: Set Your Organization-Wide Sharing Defaults

* Opportunity Access via Roles: Define Access to Opportunities

* Grant Access Using Hierarchies: Roles and Internal Access

Why Options A and B are Incorrect:

* Option A: While setting OWD to Private is necessary, it doesn't by itself grant access to opportunities tied to accounts the user owns.

* Option B: Setting OWD to Public Read-Only would allow users to see all accounts and opportunities, which contradicts the requirement to restrict access.

By setting Opportunity access on the role to view all opportunities associated with the owner's accounts, Cloud Kicks ensures that sales users have appropriate access, fulfilling the specified access requirements.

NEW QUESTION # 15

Cloud Kicks is utilizing Advanced Currency Management. The sales director submitted a request to display to total amount of all the open opportunities related to the Account page layout.

How should the consultant implement a solution to meet the requirement?

- **A. Use a record-triggered flow to set the value on the account.**
- B. Use a custom formula field on the Opportunity object.
- C. Create a roll-up summary field on the Account object.

Answer: A

Explanation:

Given that Cloud Kicks uses Advanced Currency Management (ACM):

NEW QUESTION # 16

During the Discovery phase of a Sales Cloud implementation, which step should a consultant complete to prepare for a successful engagement?

- A. Define sales processes
- B. Create the implementation plan
- C. Set project milestones.

Answer: C

Explanation:

In the Discovery phase of a Sales Cloud implementation, it is essential to define the sales processes that will be supported in Salesforce. This step involves understanding the specific stages and steps within the organization's sales cycle and ensures that Salesforce will be configured to align with these processes.

Defining sales processes is foundational for creating a solution that meets business needs and is aligned with user expectations, as it impacts subsequent configuration, training, and adoption efforts.

NEW QUESTION # 17

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