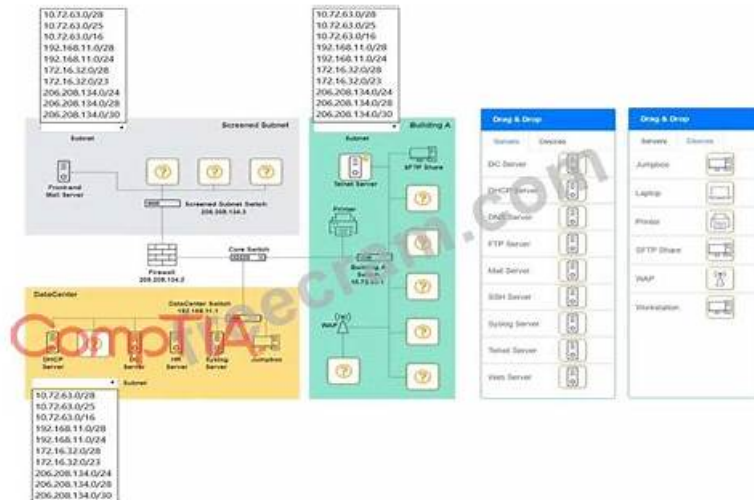


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Salesforce Certified Nonprofit Cloud Consultant (NPC) Sample Questions (Q34-Q39):

NEW QUESTION # 34

A nonprofit organization wants Major Gift Officers to use a standardized set of tasks when soliciting a large donation. The Major Gift officers must be able to add tasks as needed. Which Nonprofit Cloud feature should the organization use?

- A. Actionable Relationship Center (ARC)
- B. Actionable Segmentation
- C. Action Plans

Answer: C

Explanation:

To standardize the "Moves Management" process for major gifts, a consultant should implement Action Plans . This feature allows a nonprofit to define a "checklist" of tasks that represent their best practices for high- touch fundraising.

Step-by-Step Implementation:

- * Template Creation: The consultant creates an Action Plan Template named "Major Gift Solicitation."
- * Standardized Tasks: Within the template, they define the mandatory steps, such as:
 - * "Research donor wealth profile" (Due in 2 days)
 - * "Draft personal solicitation letter" (Due in 7 days)
 - * "Schedule face-to-face meeting" (Due in 14 days)
- * Flexibility for Users: When a Major Gift Officer starts a solicitation, they generate an Action Plan from this template and link it to the donor's record. A key feature of Action Plans is that once they are generated, the officer can add additional, ad-hoc tasks that are unique to that specific donor, meeting the "add tasks as needed" requirement.
- * Tracking: The tasks generated by the Action Plan appear in the officer's standard Salesforce task list and on the record's activity timeline, ensuring full visibility into the progress of the solicitation.

Why other options are incorrect:

- * Actionable Segmentation (Option A): This is used to create specific lists of donors for outreach (like a "call list") but does not provide a task-based workflow for individual solicitation.
- * Actionable Relationship Center (Option C): While ARC helps visualize the donor's relationships, it is a data visualization tool, not a workflow engine for standardized task management.

NEW QUESTION # 35

A consultant began an implementation project with a nonprofit that is new to Salesforce. The nonprofit's leadership is hesitant to spend time at the beginning of the project on change management. What are three reasons the consultant can share to emphasize the value and importance of governance? (Choose 3)

- A. Cost savings
- B. Compliance
- C. Security
- D. Technical interoperability
- E. Delivery Speed

Answer: A,B,C

Explanation:

Governance in a Salesforce project is the framework of rules and processes that ensure the system remains healthy, secure, and aligned with the mission. While leadership may view it as "bureaucracy," a consultant must frame it as risk management.

Three Core Pillars of Governance Value:

- * Security (E): Without governance, users might be granted broad permissions "to move fast," leading to data breaches or the exposure of sensitive donor/client information. Governance ensures a "Principle of Least Privilege" is maintained through a structured review of Permission Sets and Sharing Rules.
- * Compliance (C): Nonprofits are subject to strict regulations (e.g., GDPR, HIPAA, or IRS audit requirements). Governance provides the documentation and audit trail needed to prove that the organization is handling data according to legal standards.
- * Cost Savings (B): This is often the most persuasive argument for leadership. Poor governance leads to "Technical Debt"-duplicate apps, messy data, and conflicting automations that require expensive consultant hours to fix later. By establishing a Change Control Board (CCB), the organization avoids wasting money on redundant tools or poorly designed features. While Delivery Speed (D) and Interoperability (A) are benefits of a well-run project, they are often the result of good governance rather than the primary strategic reasons to implement it. Security, Compliance, and Cost Savings are the fundamental justifications for a nonprofit's long-term sustainability on the platform.

NEW QUESTION # 36

For a Salesforce implementation project, what is the order of phases in a project lifecycle?

- A. Plan, Initiate, Execute, Close, Monitor and Control
- B. Initiate, Plan, Execute, Monitor and Control, Close
- C. Plan, Initiate, Execute, Monitor and Control, Close

Answer: B

Explanation:

A consultant must follow a structured project management methodology to ensure a Nonprofit Cloud implementation is delivered on time and within budget. The standard lifecycle, aligned with the Project Management Institute (PMI) and Salesforce best practices, consists of five distinct phases.

* **Initiate:** This is the "Discovery" and "Alignment" phase. The consultant identifies the key stakeholders, defines the high-level project goals (the "Why"), and secures the project charter. For a nonprofit, this often involves the "Power of Us" application and licensing verification.

* **Plan:** In this phase, the consultant defines the "How." This includes gathering detailed requirements, creating the Solution Design Document (SDD), mapping the data migration strategy, and finalizing the project schedule.

* **Execute:** This is the "Build" phase. The consultant and developers configure the Nonprofit Cloud (Objects, Flows, DPE, etc.), perform data migrations, and build any necessary integrations.

* **Monitor and Control:** This phase runs concurrently with Execute. The consultant tracks progress against the plan, manages "Scope Creep," performs User Acceptance Testing (UAT), and handles quality assurance. It ensures that the project doesn't deviate from the organization's mission-critical needs.

* **Close:** The final phase involves the formal "Go-Live," end-user training, handing over documentation to the nonprofit's admin, and conducting a "Lessons Learned" session.

Why Option B and C are incorrect: You cannot "Plan" (Phase 2) effectively until you have "Initiated" (Phase 1) the project and identified who the stakeholders are and what the project charter entails. Furthermore, "Monitor and Control" must happen before you can officially "Close" the project.

NEW QUESTION # 37

A nonprofit organization is evaluating Nonprofit Cloud. The organization has common focus areas, which are used to track programs, individuals, and grants to organize data across departments. Which Nonprofit Cloud feature can the organization use to organize the data in the same manner?

- A. Data Pipelines
- **B. Interest Tags**
- C. Compliant Data Sharing

Answer: B

Explanation:

To organize data across different departments and objects using "focus areas" (e.g., "Youth Literacy," "Veterans Affairs," or "Sustainability"), a consultant should implement Interest Tags.

Interest Tags (built on the Salesforce Industry's Tagging framework) provide a flexible, "horizontal" way to categorize records regardless of their object type.

How to Implement Focus Areas with Interest Tags:

* **Define Tag Categories:** The consultant creates a Tag Category called "Focus Areas."

* **Create Tags:** Within that category, the consultant creates individual Interest Tags (e.g., "Environment," "Health," "Education").

* **Cross-Object Application:** Unlike a standard picklist which is tied to one object, Interest Tags can be added to almost any object in the Nonprofit Cloud. A consultant adds the "Interest Tags" component to:

* **Programs:** To show the focus of the service.

* **Person Accounts:** To show the interests of a donor or participant.

* **Individual Applications:** To show the focus of a grant request.

* **Unified Reporting:** Because all these records share the same tags, the organization can easily run a report to see "Everything related to Youth Literacy"-including the donors interested in it, the programs delivering it, and the grants funding it.

Why other options are incorrect:

* **Data Pipelines (Option A):** This is a tool for high-volume data transformation and aggregation, not for qualitative categorization.

* **Compliant Data Sharing (Option C):** This is a security feature for record-level visibility, not a data organization or tagging tool.

Interest Tags are the architecturally correct choice for cross-departmental "Focus Area" tracking.

NEW QUESTION # 38

A nonprofit organization wants to enable staff to track detailed notes of conversations with clients. Some of the notes will be associated to multiple individuals. Which Nonprofit Cloud object should the consultant configure?

- A. Action Plans
- **B. Interaction Summaries**
- C. Outreach Summaries

Answer: B

Explanation:

The Interaction Summary object is a cornerstone of the modern Nonprofit Cloud, borrowed from the Financial Services Cloud architecture to support professional-grade relationship management.

One of the primary advantages of Interaction Summaries over standard Salesforce "Notes" or "Activities" is the ability to relate a single set of notes to multiple participants and entities.

Configuration and Usage:

* The Interaction: Represents the meeting itself (the "Event").

* The Interaction Summary: This is the record where the detailed, often sensitive, notes are stored.

* Multiple Individuals: Using the Interaction Participant related list, a consultant can link the summary to multiple Person Accounts. For example, if a caseworker meets with a mother and her two children, a single Interaction Summary can be created and then related to all three individual records.

This ensures that the meeting notes appear on the "Timeline" and "Related Lists" for every person involved without the caseworker having to copy and paste the notes three times.

* Confidentiality: Because these summaries often contain sensitive case data, they are designed to work with Compliant Data Sharing (CDS). This allows the consultant to ensure that while the note is linked to multiple people, only staff with the correct "Participant Role" can actually read the contents.

Why other options are incorrect:

* Action Plans (Option B): These are used for tracking a series of tasks or checklists (e.g., "Steps to complete intake"). They are not a note-taking or conversation-tracking feature.

* Outreach Summaries (Option C): This object is used in Fundraising to roll up the performance of a specific marketing campaign (e.g., total gifts and donor count from a direct mail appeal); it has no relation to client conversations or case notes.

NEW QUESTION # 39

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