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Exam : **Sales-Cloud-Consultant-JPN**

Title : Salesforce Certified Sales
Cloud Consultant (Sales-
Cloud-Consultant 日本語版)

Vendor : Salesforce

Version : DEMO

QUESTION NO: 1

Cloud Kicks

の営業チームは頻繁に出張するため、本社を離れている間にリードの変換が必要になることがよくあります。

コンサルタントは何を推奨すべきでしょうか？

- A. リード変換設定で Salesforce モバイル アプリの変換を有効にします。
- B. Salesforce モバイル アプリ経由でリードを変換するためのグローバルアクションを作成します。
- C. Salesforce モバイル アプリ経由でリードを変換するには、AppExchange パッケージをインストールします。

Answer: B

Explanation:

Creating a Global Action specifically for lead conversion enables sales reps to convert leads directly from the Salesforce mobile app. This approach provides a seamless experience that leverages native Salesforce functionality, without the need for additional installations or configurations. By setting up a Global Action, the consultant ensures that lead conversion is accessible on the go, which is ideal for Cloud Kicks' traveling sales team.

While enabling conversions in Lead Conversion settings provides configuration options, it does not by itself create mobile access. AppExchange solutions are useful but often introduce additional overhead and are unnecessary when native Salesforce functionality meets the requirement.

Salesforce Documentation References:

- * Salesforce Mobile App Global Actions
- * Lead Conversion on Mobile

QUESTION NO: 2

商談分割を有効にする前にコンサルタントが考慮する必要がある前提条件は何ですか？

- A. オープンな商談がアクティブなユーザーによって所有されていることを確認します。
- B. 商談チームを有効にし、所有者がチームメンバーであることを確認します。
- C. カスタマイズされた分割タイプを商談に追加します。

Answer: B

Explanation:

Before enabling Opportunity Splits, it is necessary to enable Opportunity Teams and confirm that the opportunity owner is a team member. Here's why:

- * Requirement for Opportunity Splits: Opportunity Splits rely on Opportunity Teams to allocate credit across team members. Therefore, enabling Opportunity Teams is a prerequisite, ensuring that splits can be assigned to team members who contribute to the opportunity.
- * Ownership and Team Membership: The opportunity owner must be part of the Opportunity Team to ensure that they can be assigned a split and manage team member contributions accurately.
- * Salesforce Best Practices: Salesforce documentation on Opportunity Splits specifies that Opportunity Teams must be set up and members confirmed for split management to be operational.

In summary, the consultant should enable Opportunity Teams and confirm the owner is a

team member (Option B) before enabling Opportunity Splits.

QUESTION NO: 3

Universal Containers の営業部長は、Closed Won

とマークされたすべての商談の割合が予想よりも低いことを懸念しています。従来、有望な見込み客には少なくとも 10,000

ドルの予算が必要です。部長は、営業担当者に価値の高い見込み客を優先させるように求めています。

要件を満たすためにコンサルタントはどのようなアクションを推奨すべきでしょうか？

- A. 予算が 10,000 ドルを超える場合は、リード変換時に承認プロセスを使用します。
- B. リード予算フィールドを商談収益フィールドにマップします。
- C. リード予算フィールドを商談の商談金額フィールドにマップします。

Answer: C

Explanation:

To help the sales team at Universal Containers prioritize high-value prospects, mapping the Lead Budget field to the Opportunity Amount field during lead conversion is the most effective solution. This ensures that budget information gathered on the lead is directly available on the Opportunity, enabling sales reps to quickly assess potential revenue and prioritize accordingly.

* Data Transfer on Conversion: By mapping the Budget field from the Lead to the Opportunity's Amount field, sales reps can immediately see if the opportunity meets the \$10,000 threshold, streamlining their prioritization process.

* Field Mapping During Lead Conversion: Salesforce allows custom field mapping from Lead to Opportunity, ensuring that critical data, such as budget, is retained and accessible during and after conversion.

Option A (approval process) could add unnecessary steps, and Option B (mapping to an Opportunity Revenue field) is incorrect since "Revenue" is not a standard Opportunity field. This method aligns with best practices for field mapping as detailed in Salesforce's Guide on Custom Lead Field Mapping.

QUESTION NO: 4

Cloud Kicks の営業マネージャーは、採用率を向上させるための情報を得るために、現在 Sales Cloud を使用している 250 人の従業員とのディスカバリー

ミーティングを開催することをコンサルタントに提案しました。

この目標を効率的に達成するために、コンサルタントは営業マネージャーにどのようなアプローチを推奨すべきでしょうか？

A.

すべての従業員に、アイデアやフィードバックをコンサルタントに電子メールで送信するよう依頼します。

B. すべての従業員にアンケートを送信し、希望する変更のリストを尋ねます。

C. 多数の従業員と会ってフィードバックを聞きます。

Answer: B

Explanation:

For gathering feedback efficiently from a large group of users (250 employees), sending a survey is the recommended approach. Here's why:

- * Scalability and Efficiency: A survey can quickly reach all employees and provide a structured way to collect a wide range of input without needing to organize a large-scale meeting. Surveys can include various question types to capture qualitative and quantitative data, making it easier to analyze responses.
 - * Encouraging Participation: Surveys allow employees to provide feedback at their convenience and tend to be less intrusive than group meetings, which may be challenging to coordinate for a large number of users.
 - * Data Analysis and Reporting: Using a survey tool enables the consultant to analyze and categorize responses, identifying trends or common themes in the feedback. This helps in prioritizing changes based on the collective input.
 - * References: Salesforce offers survey capabilities that can be utilized directly within Sales Cloud or through integrated tools available on the AppExchange, making it easy to manage responses and view insights directly in Salesforce.
- In summary, sending a survey (Option B) is the most practical and efficient approach to gathering input from a large group of employees, allowing the consultant to collect comprehensive feedback that can inform strategies for improving Sales Cloud adoption.

QUESTION NO: 5

Universal Containers (UC)

- は、役員の連絡先ロールを持つ特定のアカウントに関連付けられた連絡先と取引しています。この連絡先は、UC に慈善寄付を依頼した非営利団体の役員でもあります。UC は、両方のアカウントの連絡先を追跡したいと考えています。要件を満たすためにコンサルタントが実装すべき最も効率的なソリューションは何ですか？
- A. 連絡先レコードに新しい参照フィールドを作成します。
 - B. 非営利団体アカウントに関連する新しい連絡先レコードを作成します。
 - C. 複数のアカウントへの連絡先機能を有効にします。

Answer: C

Explanation:

The most efficient way to track a single contact across multiple accounts, such as an executive associated with both a business and a nonprofit, is by enabling the Contact to Multiple Accounts feature. This functionality allows a contact to have a primary relationship with one account while also maintaining indirect relationships with other accounts. For example, the contact could be directly related to their primary business account while also being connected to a nonprofit account as an indirect relationship. This avoids the need for duplicate records and ensures that interactions across all related accounts are tracked within a single contact record

QUESTION NO: 6

Cloud Kicks では、すべての営業担当者に販売目標を設定する必要があります。コンサルタントはどのソリューションを検討すべきでしょうか？

- A. データ インポート ウィザードを使用します。
- B. セットアップから予測クォータを有効にします。
- C. プロファイルごとにクォータ値を割り当てます。

Answer: B

Explanation:

To set sales quotas for sales reps, Salesforce provides a feature called Forecast Quotas. By enabling Forecast Quotas from Setup, organizations can define and manage sales quotas for individual sales reps, teams, or territories within the Salesforce Forecasts feature. This allows sales managers to set goals and track sales performance against these quotas.

* Setting Up Forecast Quotas: Once enabled, quotas can be managed from the Forecasts tab, where managers can set monthly or quarterly targets for reps based on their sales expectations.

* Visibility and Tracking: The quota information integrates directly with the Forecasts feature, providing visibility for reps and managers to monitor progress and performance.

Option A (Data Import Wizard) is primarily for importing data, not for setting quotas. Option C (assigning quota by profile) is not how quotas are assigned in Salesforce; they are set per user or role. For more details, refer to the Salesforce Forecast Quotas documentation.

QUESTION NO: 7

Cloud Kicks では、一部の連絡先を多数の取引先に関連付ける必要があります。この要件を満たすためにコンサルタントはどのソリューションを推奨すべきでしょうか？

- A. 複数のアカウントへの連絡先機能を使用します。
- B. 取引先の取引先責任者ロール関連リストを使用します。
- C. 連絡先に複数のカスタム アカウント参照フィールドを追加します。

Answer: A

Explanation:

To associate contacts with multiple accounts, using the Contact to Multiple Accounts feature is the ideal solution. Here's why:

* Built-In Feature: Salesforce provides the Contact to Multiple Accounts feature as a standard capability, allowing a single contact to be associated with multiple accounts without needing custom fields or objects.

* Relationship Management: This feature allows users to specify the role of the contact in relation to each account, which helps Cloud Kicks manage complex relationships across various accounts.

* Salesforce Best Practices: Salesforce recommends utilizing standard features like Contact to Multiple Accounts to avoid unnecessary customization and ensure compatibility with Salesforce updates.

* References: Salesforce documentation on Contact to Multiple Accounts details the setup and use of this feature to support relationship management.

In summary, using the Contact to Multiple Accounts feature (Option A) is the recommended approach for associating contacts with multiple accounts.

QUESTION NO: 8

Universal Containers

の営業担当者は、顧客または見込み客の連絡先が営業担当者が送信した電子メールをいつ開いたかを把握し、その後すぐに連絡先にフォローアップできるようにしたいと考えています。

要件を満たすためにコンサルタントはどのツールを推奨すべきでしょうか？

- A. Salesforce 受信トレイ
- B. 強化された電子メール

C. アクティビティキャプチャ

Answer: A

Explanation:

Salesforce Inbox provides email tracking capabilities, allowing sales reps to see when recipients open emails, click links, or reply. This real-time tracking enables reps to follow up promptly after a customer or prospect has interacted with an email, which aligns with Universal Containers' requirement for immediate insights on email engagement.

* Real-Time Email Tracking: Salesforce Inbox offers insights into customer interactions, giving reps timely information on when emails are opened, which can help prioritize follow-up actions.

* Integration with Sales Cloud: It integrates directly with Sales Cloud, enabling reps to manage customer interactions seamlessly from their inbox.

Option B (Enhanced Email) and Option C (Einstein Activity Capture) lack direct email open tracking, which is specifically offered by Salesforce Inbox. More information on Salesforce Inbox can be found in Salesforce Inbox documentation.

QUESTION NO: 9

Cloud Kicks (CK) は、マーケティング フォーカスグループのために請負業者と頻繁に連携しています。これらの請負業者は頻繁に会社を変更するため、CK は Accounts を通じて会社の履歴を保持したいと考えています。

コンサルタントは何を推奨すべきでしょうか？

A. カスタム オブジェクトを使用して、以前の会社を表します。

B. 連絡先から複数のアカウントへの機能を実装します。

C. 関係を表すために個人アカウントを実装します。

Answer: C

Explanation:

The Contacts to Multiple Accounts feature in Salesforce allows a single contact to be associated with multiple accounts, which is useful for situations where individuals change companies or have multiple affiliations. For Cloud Kicks, this feature enables tracking of contractors' historical company associations while maintaining a single contact record for each individual. This method retains a complete history of each contractor's company associations over time, aligning with CK's need to retain company history.

For more on Contacts to Multiple Accounts, refer to: Contacts to Multiple Accounts Overview. Cloud Kicks (CK) frequently works with contractors who change companies often. CK wants to retain the company history of these contractors through Accounts. To meet this requirement, the consultant should recommend implementing the Contacts to Multiple Accounts feature.

Key Points:

* Contacts to Multiple Accounts Feature:

* Overview: This feature allows a single contact to be associated with multiple accounts in Salesforce.

* Primary Account: Each contact has a primary account, which is the account reflected in the Account Name field on the contact's detail page.

* Related Accounts: Additional accounts can be associated with the contact via the Related Accounts list, maintaining a history of previous employers or associations.

* Benefits:

* Historical Tracking: CK can track the history of contractors as they move between different companies, retaining valuable relationship data.

* Data Integrity: Eliminates the need for duplicate contact records, ensuring data remains clean and consistent.

* Enhanced Relationships: Provides a complete view of a contact's affiliations, aiding in marketing and communication efforts.

Why Other Options Are Less Suitable:

* Option A: Using a custom object to represent previous companies is unnecessary and complicates the data model when standard functionality exists.

* Option C: Implementing Person Accounts is intended for organizations that deal with individuals rather than businesses. It merges account and contact fields for B2C scenarios, which doesn't align with CK's need to track contractors associated with multiple companies.

Salesforce Sales Cloud References:

* Relate a Single Contact to Multiple Accounts: Salesforce Help - Contacts to Multiple Accounts

* Setting Up Contacts to Multiple Accounts: Salesforce Setup Guide

By implementing the Contacts to Multiple Accounts feature, Cloud Kicks can effectively manage contractors who frequently change companies while preserving their company history through Accounts.

QUESTION NO: 10

新しいプロジェクトのキックオフ

ミーティングで、コンサルタントはプロジェクト実装計画で使用する情報の収集を開始します。

参加者にプロジェクトの成功とはどのようなものを定義するよう求めます。

コンサルタントはどの戦略を使用していますか？

A. デザインディレクション

B. 発見

C. チャレンジフレーミング

Answer: B

Explanation:

During the Discovery phase, consultants gather information to understand the client's requirements, challenges, and goals. By asking participants to define what project success looks like, the consultant is conducting discovery to establish clear objectives and align the implementation with the client's expectations.

This approach helps ensure that the solution will meet the client's needs and supports setting measurable goals for the project.

Design Direction and Challenge Framing are useful strategies, but they occur after the Discovery phase, once the initial understanding of goals and challenges is established.

Salesforce Documentation References:

* Salesforce Discovery Process

* Consulting Engagement Phases

QUESTION NO: 11

Northern Trail Outfitters

の大手取引先の中には、多数の連絡先を持つものがあります。営業担当者は、これらの連絡先が互いにどのように関連しているかを確認し、報告構造を理解したいと考えています。この要件を満たすためにコンサルタントはどの機能を推奨すべきでしょうか？

- A. 連絡先階層
- B. 複数のアカウントへの連絡先
- C. 連絡先の役割

Answer: A

Explanation:

The Contact Hierarchy feature in Salesforce Sales Cloud allows users to view and understand the relationships and reporting structures among contacts within the same account. This feature provides a visual representation of the hierarchy, enabling sales reps to quickly see how contacts are connected and who reports to whom within large accounts. This is particularly useful for large organizations where multiple contacts need to be managed, as it provides insight into key decision-makers and influencers in the account structure. For more information, refer to the Salesforce documentation on Contact Hierarchy.

QUESTION NO: 12

Cloud Kicks (CK) との発見フェーズが終了しました。

CK は、新しいビジネス

プロセスがどのように機能するかを視覚的に確認する方法を求めています。CK

のプロセスは複雑で、複数のスライドが必要です。

この高レベルのビューを提供するためにコンサルタントは何を作成する必要がありますか？

- A. バリューストリームマップ
- B. ユニバーサルプロセス表記
- C. 機能モデル

Answer: B

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.

QUESTION NO: 13

Universal Containers

は、ギャップを特定するためにデータを分析しており、オープンな商談を持つどのアカウントに連絡先が欠けているかを把握したいと考えています。

このレポートを作成するためにコンサルタントは何を推奨すべきでしょうか？

- A. レポートのスナップショット
- B. ロールアップサマリーが送信されました
- C. クロスフィルター

Answer: C

Explanation:

To identify accounts with open opportunities that are missing contacts, using a cross filter in Salesforce reports is the most effective approach. Cross filters allow for filtering records based on related objects, such as showing Accounts with open Opportunities that lack associated Contacts. This method provides a clear and actionable report that highlights data gaps directly relevant to Universal Containers' analysis needs, enabling them to address these gaps more efficiently

QUESTION NO: 14

Universal Containers (UC) は、夜間に作成されたリードが 1 日の制限を超えて大幅に増加していることに気付きました。

検査の結果、そのリードは

ボットによって作成される可能性があります。UC

は、フォーム上のスパムを制限するための安全対策を講じずに、標準の Web-to-Lead フォームを使用します。

フォームを再発行する前に、コンサルタントは第一の防御策として何を推奨すべきでしょうか？

- A. 保護機能が組み込まれたカスタム Web-to-Lead の代替手段を使用します。
- B. カスタム Web-to-リード処理を備えた AppExchange パッケージを使用します。
- C. Web-to-Lead 設定で reCAPTCHA 検証を要求するを選択します。

Answer: C

Explanation:

The first line of defense against spam bots in Web-to-Lead forms is enabling reCAPTCHA. Salesforce provides a built-in option for reCAPTCHA verification, which helps prevent automated submissions by requiring users to complete a reCAPTCHA challenge before submitting the form. This is a quick and effective solution for reducing spam without the need for custom coding or third-party solutions.

QUESTION NO: 15

Cloud Kicks

の営業担当者は、最小限のナビゲーションやクリックで現在の商談の詳細をすべて確認したいと考えています。

コンサルタントはどの機能を推奨すべきでしょうか？

- A. 商談を含む新しい Sales Console アプリを開発します。
- B. 「私の商談」リストビューから「分割ビュー」オプションを選択します。
- C. 「My Opportunities」に関するレポートを含むダッシュボードを作成します。

Answer: B

Explanation:

To allow sales reps to view all details of their current opportunities with minimal navigation, the consultant should recommend using the Split View option in Salesforce.

Key Points:

- * Split View Feature: Split View enables users to see a list of records alongside the details of a selected record on the same screen. This allows for quick navigation between records without excessive clicking.
- * Efficiency in Navigation: Sales reps can click through the list of opportunities on the left pane, and the details of each selected opportunity will display on the right pane. This reduces the need to open each record in a new tab or window.
- * Minimal Clicks: With Split View, reps can cycle through their opportunities seamlessly, enhancing productivity and saving time.

Salesforce Sales Cloud References:

- * Using Split View: Salesforce Help - Work with List Views Using Split View
- * Benefits of Split View: Split View is designed to help users process lists of records more efficiently by reducing navigation steps and keeping context while reviewing multiple records. By selecting the Split View option from the My Opportunities list view, sales reps at Cloud Kicks can efficiently access all the details of their current opportunities with minimal navigation or clicks.

QUESTION NO: 16

Cloud Kicks (CK) は共有ルールを実装したいと考えています。

コンサルタントは CK にどのような考慮事項を説明する必要がありますか？

- A. 共有ルールにより、組織全体のデフォルトレベルを超えてアクセスを拡張できます。
- B. 共有ルールを削除すると、そのルールによって作成された共有アクセスを手動で削除する必要があります。
- C. 共有ルールは、ソース データ

セットの定義を満たす新しいレコードにのみ適用されます。

Answer: A

Explanation:

In Salesforce, sharing rules are used to extend access to records beyond the default access levels established by organization-wide defaults (OWDs). These rules allow administrators to define which groups of users (e.

g., roles, public groups, territories) need additional access, such as Read/Write permissions, to records they do not own. Importantly, sharing rules cannot restrict access below the level set by OWDs; they only provide additional access. Thus, for Cloud Kicks, implementing sharing rules means expanding access where needed to facilitate collaboration and ensure that the right users have appropriate visibility into records like Accounts, Opportunities, or other objects based on their role requirements

QUESTION NO: 17

Cloud Kicks (CK) は、Sales Cloud

を使用している競合他社を買収しました。両社には同じ顧客と見込み客が多数います。CK の CEO は、コンサルタントが上級管理者と協力してユースケースを文書化し、CK 組織に所属する全員のプロジェクト計画を決定することを望んでいます。

コンサルタントはどのようなアクションを推奨すべきでしょうか？

- A. CK の関係者とのキックオフ ミーティングを開催します。
- B. 調査セッションを実施し、各企業の既存のビジネス慣行を文書化します。
- C. 競合他社のシステムからデータをエクスポートし、Ck の組織にマージします。

Answer: C

Explanation:

When merging two organizations, it is critical to understand and document the existing business practices of each entity. Conducting discovery sessions with senior managers helps identify differences, overlaps, and potential integration points between the companies' processes. This step provides a comprehensive view of each organization's needs and lays the foundation for creating a cohesive project plan that aligns with both companies' goals. Salesforce recommends discovery sessions as a best practice during mergers and acquisitions, as they facilitate thorough understanding and ensure that the integrated solution meets the combined organization's requirements.

QUESTION NO: 18

Universal Containers は、過去 5 年間、Sales Cloud

を使用してリード、アカウント、連絡先、商談を管理してきました。

営業担当の SVP は最近、カンファレンスに出席し、Sales Cloud Einstein

の機能について学びました。SVP は、Einstein Lead Scoring と Einstein Deal Insights に非常に興味を持っています。SVP

は、すぐに実装を行うためにコンサルタントを雇いました。

コンサルタントはまずどのステップを踏むべきでしょうか？

- A. サンドボックスで Einstein Readiness Assessor を実行します。
- B. 開発者組織で Einstein 活動キャプチャを有効にします。
- C. 本番環境で両方の Einstein 機能を有効にします。

Answer: A

Explanation:

Before implementing Einstein features such as Einstein Lead Scoring and Einstein Deal Insights, it is essential to run the Einstein Readiness Assessor. This tool evaluates the Salesforce org's data to determine whether it meets the requirements for these Einstein features, ensuring that they will provide accurate and actionable insights.

* **Assessing Data Readiness:** The Einstein Readiness Assessor checks if the data quality and quantity are sufficient for Einstein's AI-driven insights, which is crucial for accurate scoring and predictions.

* **Informed Implementation Planning:** Running the readiness assessment in a sandbox allows the consultant to understand any adjustments needed before enabling the features in production.

Option B (enabling Einstein Activity Capture in a developer org) and Option C (enabling both features in production) should be done only after confirming readiness. For more information, see the Einstein Readiness Assessor documentation.

QUESTION NO: 19

Cloud Kicks の営業担当副社長は、営業チームが Salesforce モバイルアプリを使用してタスクを完了することを望んでいます。

営業チームは、

リード、連絡先、商談を簡単に編集できます。

コンサルタントは営業チームにどの機能の使用を推奨すべきでしょうか？

A. スマートアクション

B. Lightning モバイル コンポーネント

C. アインシュタインアクティビティキャプチャ

Answer: A

Explanation:

Smart Actions streamline data entry and common tasks in the Salesforce mobile app, allowing users to quickly create and edit records such as leads, contacts, and opportunities. These actions provide a simplified and intuitive interface tailored for mobile use, enhancing productivity and usability for the sales team. By utilizing Smart Actions, Cloud Kicks' sales team can efficiently manage their tasks on the go without needing to navigate complex forms or screens.