

# Salesforce Certified Service Cloud Consultant **Study Guide**

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## About the Salesforce Certified Service Cloud Consultant Program

The Salesforce Certified Consultant program is designed for consultants who have experience implementing Salesforce Service Cloud solutions in a customer-facing role. The intended audience has proven experience with the administration and configuration of a Salesforce application, as demonstrated through successful completion of the Salesforce Certified Administrator exam. The Salesforce Certified Service Cloud Consultant is able to successfully design and implement Service Cloud solutions that meet customer business requirements, are maintainable and scalable, and contribute to long-term customer success.

### Section 1. Purpose of this Study Guide

This study guide is designed to help you evaluate if you are ready to successfully complete the Certified Service Cloud Consultant exam. This guide provides information about the target audience for the certification program, the recommended training and documentation, and a complete list of exam objectives—all with the intent of helping you achieve a passing score. Salesforce highly recommends a combination of on-the-job experience and self-study to maximize your chances of passing the exam.

### Section 2. Audience Description: Salesforce Certified Service Cloud Consultant

A Salesforce Certified Service Cloud Consultant designs and deploys solutions that support customer business processes and requirements using Salesforce applications. The consultant has experience designing solutions using the Service Cloud functionality and can lead the implementation of these solutions within a customer organization. The consultant has both contact center industry experience and expertise in Salesforce applications including the knowledge needed to implement multiple applications in common customer scenarios.

The Salesforce Certified Service Cloud Consultant is interested in demonstrating his/her expertise as a cloud computing implementation consultant with a specialty in the contact center domain. The Salesforce Certified Consultant has 2–5 years of experience as a senior business analyst and has developed the skills outlined below:

- Experience managing implementation projects
- Strong analytical and problem solving skills
- Deep knowledge of the Salesforce product lines
- Solid understanding of Internet technologies and cloud computing
- Solid understanding of data management and database concepts
- Familiarity with the software development life cycle
- Ability to:
  - Design and implement successful solutions
  - Anticipate and mitigate risk
  - Meet and manage customer expectations
  - Increase customer confidence
  - Consistently deliver effective business solutions
  - Manage solution delivery and any issues that arise
  - Build solutions that are scalable and maintainable
  - Set up change management practices to ensure long-term solution success

- Troubleshoot and resolve issues
- Prioritize and escalate customer issues

### Section 3. About the Exam

The Salesforce Certified Service Cloud Consultant exam has the following characteristics:

- Content: 60 multiple-choice/multiple-select questions
- Time allotted to complete the exam: 1 hour and 45 minutes\*
- Passing score: 68 percent
- Registration fee: USD 200; Retake fee: USD 100
- References: No hard-copy or online materials may be referenced during the exam
- Prerequisites: Successful completion of the Salesforce Certified Administrator exam
- Note: When evaluating questions and answers, please consider all currently available features including those available in either Lightning Experience or Salesforce Classic.

### Section 4. Recommended Training and References

As preparation for this exam, Salesforce Training and Certification recommends a combination of hands-on experience implementing Service Cloud solutions in the contact center domain, training course completion, and self-study in the areas listed in the Exam Outline section of this study guide.

Salesforce Training and Certification recommends the following online courses and implementation guides to guide your study:

- Online course: Preparing for the Certified Service Cloud Consultant Exam
- Online course: Implementing Case Management Across Channels
- Online course: Implementing Salesforce Knowledge
- Online course: Administration Essentials for the Service Cloud
- Online course: Setting up and Building Communities
- Instructor-led course: Preparing for Your Salesforce Service Cloud Consultant Certification (CRT261)

Other helpful resources:

- Online course: Administering Salesforce Knowledge
- Online course: Publishing Articles with Knowledge
- Online course: Administering Entitlements
- Online course: Increase Productivity with Visual Workflow
- Online course: Introduction to Open CTI
- Online course: CTI Troubleshooting for Salesforce CTI Toolkit
- Online course: Reporting for Call Center Managers
- Implementation Guide: [Case Management](#)
- Implementation Guide: [Salesforce Knowledge](#)
- Implementation Guide: [Entitlement Management](#)

- Implementation Guide: [Migrating From Portals to Communities](#)
- Implementation Guide: [Getting Started With Salesforce Communities](#)
- Implementation Guide: [Getting Started with Social Customer Service](#)
- Implementation Guide: [Live Agent](#)

Launch online training from your Salesforce application by clicking the **Help & Training** link in the upper right corner of the screen (requires login) and searching for the desired courses, listed above.

In addition, Salesforce Training and Certification recommends reviewing online Documentation, Tip Sheets and User Guides by searching for the topics listed in the Exam Outline section of the study guide and studying the information related to those topics. Documentation, Tip Sheets and User Guides can also be accessed through **Help & Training**. Documentation is also available in PDF format here: <https://na1.Salesforce/help/doc/en/sf.pdf>.

## Section 5. Exam Outline

The Salesforce Certified Service Cloud Consultant exam measures a candidate's knowledge and skills related to the objectives listed below. A candidate should have hands-on experience implementing Service Cloud solutions and have demonstrated the application of each of the features/functions below.

Objective	Weighting
<b>Industry Knowledge</b>	<b>15%</b>
Explain the factors that influence key contact center metrics, KPIs, and business challenges.	
Explain the uses cases, costs and benefits for different interaction channels.	
Identify challenges and considerations for business continuity in the contact center.	
Compare and contrast the different types of contact centers and their business drivers.	
Identify the core tenets of KCS.	
Describe how various components of a contact center can solve different business challenges.	
<b>Implementation Strategies</b>	<b>5%</b>
Given a scenario, determine how to facilitate a successful consulting engagement	
Given a scenario, determine appropriate contact center deployment strategies.	
<b>Service Cloud Solution Design</b>	<b>15%</b>
Given a scenario, analyze customer requirements to determine an appropriate solution design considering capabilities, limitations and design trade-offs.	
Distinguish when it is appropriate to include custom application development or third-party applications.	
Distinguish the key components that contribute to performance optimization within a design.	
Describe the user experience requirements that can be solved by the Salesforce Console for Service.	
<b>Knowledge Management</b>	<b>11%</b>
Explain the knowledge article lifecycle including creation, publishing, consumption, and feedback.	
Given business process requirements, determine the appropriate approach to manage Knowledge adoption and maintenance.	
Compare and contrast Files, Content, Solutions, and Knowledge.	
Given a set of requirements, determine how to configure data categories, article types, and publishing workflow.	
Distinguish the key factors to consider when designing a Knowledge data migration strategy.	
<b>Interaction Channels</b>	<b>15%</b>
Describe the use cases and functionality for each interaction channel including mobile, phone, email, web, chat and social media.	

Objective	Weighting
Differentiate between the available email-to-case and web-to-case solutions and explain how to configure each.	
Explain the Open CTI features, architecture, and implications.	
Given a set of requirements, recommend the appropriate Communities solution.	
Explain the design considerations and best practices when configuring an interaction channel solution.	
<b>Case Management</b>	<b>25%</b>
Given a set of requirements, design a case management solution from case creation to closure including case assignment, case escalation, case resolution, and case disposition.	
Describe the relationships between cases and other areas such as assets, entitlements, Communities, Live Agent, and Knowledge.	
Given a set of KPIs, determine the appropriate case management solution.	
Identify use cases for Chatter, Chatter Answers and Case Feed within case management.	
Explain the capabilities, use cases, and how to configure the service entitlements in Salesforce.	
Explain the use cases, capabilities and limitations of Visual Workflow pertinent to case management.	
Identify capabilities for managing cases using social media.	
<b>Contact Center Analytics</b>	<b>7%</b>
Given a set of desired metrics, determine the appropriate reporting solution taking into account data sources, data volume, and various contact center technologies.	
Given a scenario, evaluate the considerations when designing reports and dashboards to serve different stakeholders (agents, supervisors, managers, executives).	
Given a scenario, recommend appropriate strategies to measure adoption given customer size, implementation design, and required metrics.	
<b>Integration and Data Management</b>	<b>7%</b>
Given a scenario, analyze the implications and design considerations of large data and transaction volumes.	
Explain the use cases and considerations common to contact center integration patterns.	
Explain the use cases and considerations for data migration and data quality.	

## Section 6. Sample Exam Questions

The following questions are representative of those on the Salesforce Certified Service Cloud Consultant exam. These questions are not designed to test your readiness to successfully complete the certification exam, but should be used to become familiar with the types of questions on the exam. The actual exam questions may be more or less difficult than the questions below.

- Which task should be included in a business continuity plan for a contact center?  
(There are three correct answers.)
  - Route cases to agents in an alternate center.
  - Disable the Interactive Voice Response system.
  - Deliver training on case handling for contingent staff.
  - Update the case status field values.
  - Monitor service level agreements (SLAs) and notify customers.
- Universal Containers plans to deploy Salesforce Console for Service to its support team. Which step should be considered in deployment?  
(There are three correct answers.)
  - Customize highlights panels for all objects.
  - Set up interaction logs and assign them to user profiles.
  - Assign users the Service Cloud User feature license.

- D. Set up users and assign them to a queue.
  - E. Customize case list views.
3. Universal Containers needs to closely manage the publishing life cycle for articles in Knowledge. Article managers will be granted different publishing capabilities, from article creation through archiving published articles.
- How should the permissions for article managers be set up?
- A. Create public groups with article managers and assign each group to specific article actions.
  - B. Create publication teams with article managers and assign each team to specific article actions.
  - C. Create public groups with article managers and assign each group to specific publication states.
  - D. Create publication teams with article managers and assign each team to specific publication states.
4. A support agent has a detailed question about product functionality. The agent needs to access a real-time response from internal subject matter experts.
- Which feature will help the support agent send this question to the right group of people?
- A. Mass email.
  - B. Chatter groups.
  - C. Public groups.
  - D. Escalation rule.
5. Which native Service Cloud solution is used for case satisfaction surveys?
- A. Enable the case survey option on the case object.
  - B. Enable the case survey auto-response rule.
  - C. Check the survey option in the case settings.
  - D. Create a Web-to-case form with a custom case type of survey.

## Section 7. Answers to Sample Exam Questions

- 1. A, C, E
- 2. A, B, C
- 3. A
- 4. B
- 5. D

## Section 8. Maintaining a Certification

Successful completion of online, release-specific Salesforce Certified Administrator exams is required to maintain the pre-requisite to the Salesforce Certified Service Cloud Consultant credential. Release exams are published three times a year for each of the Salesforce product releases throughout the year.

Successful maintenance of the pre-requisite credential, Salesforce Certified Administrator, is required to maintain this credential. An annual maintenance fee of \$100 will be charged when registering for every third release exam, based on when the pre-requisite credential was earned. The maintenance fee includes the three release exams and access to the supporting training material. Salesforce Certified professionals will be notified automatically when new release training material and exams become available.