

Study Guide

Salesforce Certified Sales
Foundations



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Salesforce Certified Sales Foundations - Yatharth Chauhan

Complete Study Guide to Prepare for an Exam.

Introduction: What is Salesforce Sales Foundations?

The Salesforce Sales Foundations certification proves you understand how to use Salesforce to manage sales effectively. This is an ENTRY-LEVEL certification designed for sales professionals who work with Salesforce daily. This is perfect for sales reps, team leads, and anyone who uses Sales Cloud.

Think of this certification as proving you know:

- How to manage customer relationships using Salesforce
- How to move deals through the sales process
- How to track pipeline and forecast sales
- How to develop accounts and close deals
- How to use Salesforce tools to sell better

Who should take this exam?

- Sales representatives (entry level and experienced)
 - Sales managers
 - Sales development representatives (SDRs)
 - Account executives
 - Anyone managing sales in Salesforce
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EXAM BASICS: What You Need to Know

Total Questions: 40 multiple-choice questions plus up to 5 practice questions that don't count

Time Given: 70 minutes (1 hour 10 minutes)

Passing Score: 62% (which means about 25 questions correct out of 40)

Cost: 75 USD (approximately 6,000 INR)

Retake Cost: FREE! If you fail, you can try again for free

Prerequisites: None - anyone can take this exam

Language: Available in English and other languages

Where to Take: Online from home or at a testing center

This is the EASIEST passing score in Salesforce certifications! Only 62% needed.

THE 6 EXAM TOPICS: What You Must Study

Your exam covers 6 main areas. Here's what matters for each:

1. Planning - 21% of Exam (About 8-9 questions)

This is about STRATEGY and PREPARATION before you sell.

What You Need to Know:

1. Territory Planning

Territory planning means dividing your market into specific areas for your sales team.

Think of it like:

- Dividing a city into neighborhoods
- Each sales rep gets their own neighborhood
- Each rep manages customers in their neighborhood

Why do it?

- Sales reps focus on their area only
- Don't compete with each other for same customer
- Clear responsibility
- Better coverage of market

Key Territory Concepts:

1. Territory Definition

- Geographic area (like "California region")
- Account-based (like "all tech companies")
- Product-based (like "all software sales")
- Mix of above

2. Territory Assignment

- Which sales rep manages which territory
- Can be one rep per territory or multiple
- Accounts get assigned to territories
- Opportunities follow their account's territory

3. Territory Hierarchy

- Large territories divided into smaller ones
- Example: National → Regional → District → Individual territory
- Managers manage larger territories
- Reps manage smaller territories

4. Account Segmentation

Segmentation means grouping customers into categories based on characteristics.

Types of Segmentation:

1. Geographic Segmentation

- Based on location
- Example: East coast vs. West coast customers

2. Company Size Segmentation

- Based on customer company size
- Example: Enterprise (big), Mid-market (medium), SMB (small)

3. Industry Segmentation

- Based on what industry customer is in
- Example: Healthcare, Technology, Finance

4. Revenue Potential Segmentation

- Based on how much money they can bring in
- Example: High-value vs. low-value customers

Why Segment?

- Different customers need different approaches
- Sales reps can specialize
- Better resource allocation
- More effective sales strategies

1. Quota Assignment

Quota is the SALES TARGET you assign to each sales rep or team.

Quota Types:

1. Individual Quotas

- One number per sales rep
- Example: "Your quota this quarter is 500,000 dollars"

2. Team Quotas

- Total target for entire team
- Team works together to reach it

3. Territory Quotas

- Target for entire territory
- Shared among all reps in that territory

How to Set Quotas:

1. Look at historical data

- How much did this territory sell last year?
- How much did this rep sell last time?

2. Consider market conditions

- Is market growing or shrinking?
- Are competitors stronger or weaker?

3. Account for capacity

- How many accounts can one rep manage?
- How long does it take to close a deal?

4. Set challenging but achievable targets

- Too easy: reps don't push themselves
- Too hard: reps get frustrated and quit

5. Resource Planning

This is about having the RIGHT PEOPLE in the RIGHT PLACES.

Questions to Ask:

- Do we have enough sales reps?
 - Are reps in right territories?
 - Do reps have right skills?
 - Do we have support staff (SDRs, customer success)?
-

2. Customer Engagement - 15% of Exam (About 6 questions)

This is about BUILDING RELATIONSHIPS with customers.

What You Need to Know:

1. Account Strategy

Account strategy means having a plan for each big customer.

Key Concept: Account Planning

Think of it like:

- You're building a relationship with the customer
- Not just making one sale
- Planning for long-term partnership

Account Plan Includes:

1. Understanding Customer Business

- What does this company do?
- What are their goals?
- What are their challenges?
- What industry are they in?

2. Identifying Key Stakeholders

- Who makes decisions?
- Who influences decisions?
- Who else uses your product?
- Who else might benefit?

3. Multi-threading Strategy

- Multi-threading = building relationships with MULTIPLE people at the customer
- Don't just know one contact person
- Know several decision-makers
- Know influencers
- Know users

Why Multi-thread?

- If your contact leaves, you still have relationships
- Different people have different needs
- You understand customer better
- Less likely to lose the account

1. Value Proposition

- What specific benefit do YOU bring to THIS customer?
- Why should they buy from you instead of competitors?
- What problem do you solve for them?

2. Customer Engagement Techniques

How to stay connected to customers throughout the sales process.

Engagement Methods:

1. Email Communication

- Regular updates about progress
- Sharing relevant content

- Following up on meetings

2. Phone Calls

- Check-ins with stakeholders
- Addressing concerns
- Building relationships

3. Social Media

- LinkedIn connections
- Sharing company updates
- Staying top-of-mind

4. In-Person Meetings

- Regular business reviews
- Strategic planning sessions
- Celebration of wins

5. Content Sharing

- Case studies (how you helped similar customers)
- Industry insights
- Thought leadership articles
- Relevant product information

6. Value Communication

This is about EXPLAINING why your solution matters to THIS specific customer.

Not About:

- Product features (what it does)
- Generic benefits (helps companies sell more)

It IS About:

- Their specific problem
- How your solution solves THAT problem

- What they gain
- What it means for their business

Example - WRONG Way:

"Our product tracks customer data and improves reporting capabilities."

Example - RIGHT Way:

"Based on what you told me about losing track of customer interactions, our solution automatically logs all communications so your team never misses follow-ups. This should help you reduce lost deals by about 30 percent, which at your current volume means approximately 200,000 dollars in additional revenue."

3. Deal Management - 37% of Exam (About 15 questions)

This is the BIGGEST section! This is about moving customers from interest to purchase.

What You Need to Know:

1. Lead vs. Opportunity

LEADS - Early Stage

A Lead is a POTENTIAL customer. You found them. They might be interested.

Lead Characteristics:

- Name and contact information
- Company info
- General interest
- No confirmed need yet
- Could become an opportunity OR they might not buy

Example Lead:

- "John Smith from TechCorp might need our solution"
- You haven't had a real conversation yet
- Just general inquiry

OPPORTUNITIES - Real Potential

An Opportunity is a QUALIFIED lead. They have a REAL NEED and REAL POTENTIAL to buy.

Opportunity Characteristics:

- Confirmed need
- Budget allocated
- Decision timeline established
- Decision-makers identified
- Real deal with real timeline

Example Opportunity:

- "TechCorp wants to replace their current system by end of quarter"
- "They have 500,000 dollars budget"
- "We're in the final presentation stage"

Lead to Opportunity Conversion:

1. Find lead (cold call, referral, marketing)
2. Qualify lead (do they have need? budget? timeline?)
3. If yes â' convert to opportunity
4. If no â' close as "not qualified"

1. Qualification: The BANT Framework

BANT is how you decide if a lead is worth your time.

B = BUDGET

- Does the customer have money to buy?
- What is their budget?
- Do they have funds approved?
- What is budget timeline?

A = AUTHORITY

- Is person you're talking to a decision-maker?
- Can they approve the purchase?
- Or do they need to get approval from someone else?
- Who is the real decision-maker?

N = NEED

- Does customer have a real problem?
- Does your solution solve their problem?
- Is problem important enough to fix?
- Are they actively looking to solve it?

T = TIMELINE

- When do they need to buy?
- Is there a specific deadline?
- Are they in a hurry or thinking long-term?
- Do timelines align with your sales process?

How to Use BANT:

1. Ask questions to uncover each element
2. If all four are YES â†’ Qualified opportunity
3. If any are NO or UNCLEAR â†’ Need more discovery

Example Conversation:

Rep: "When are you planning to implement a new solution?" (Timeline)

Customer: "By end of Q3"

Rep: "Great. Who will be involved in the decision?" (Authority)

Customer: "I decide with approval from VP Finance"

Rep: "What is your budget range?" (Budget)

Customer: "We have 250,000 dollars approved"

Rep: "Can you tell me what's driving the urgency?" (Need)

Customer: "Our current system is too slow and losing us sales"

Result: BANT qualified! This is a real opportunity.

1. Opportunity Stages

Opportunity stages are the STEPS in your sales process. They represent the deal's progress.

Standard Salesforce Opportunity Stages:

1. Prospecting
 - Early stage
 - You found them
 - Initial conversation
 - Still determining if real opportunity
2. Qualification

- You've confirmed they have need
- They are interested
- But still early
- Working on relationship

3. Needs Analysis

- Deep dive into their needs
- Understanding their current situation
- Identifying their pain points
- Preparing solution

4. Value Proposition

- You've presented solution
- They see value
- Discussing how it solves their problem
- Getting buy-in on concept

5. Decision Makers

- Identifying all people involved in decision
- Getting input from all stakeholders
- Building consensus
- Making sure everyone agrees on solution

6. Perception Analysis

- Customer is evaluating your solution
- Possibly comparing to competitors
- Addressing concerns
- Building confidence in choice

7. Proposal Quote

- Formal proposal sent

- Specific price and terms
- Customer reviewing details
- Negotiation may happen here

8. Negotiation Review

- Discussing price
- Discussing contract terms
- Fine-tuning details
- Getting agreement on final terms

9. Closed Won

- Deal closed!
- Customer bought
- Agreement signed
- Now handoff to customer success

10. Closed Lost

- Deal ended
- Customer chose competitor OR decided not to buy
- Time to move on

Moving Through Stages:

- Every deal should progress through stages
- Don't skip stages
- Exit criteria: What must happen to move to next stage?
- Track where deals are stuck

1. Discovery

Discovery is asking the RIGHT QUESTIONS to understand customer's needs.

What is Discovery?

- Asking questions

- Listening to understand their situation
- Understanding their challenges
- Understanding their goals
- Understanding what success means to them

Key Discovery Questions:

1. Current Situation

- "Can you walk me through your current process?"
- "What system are you using now?"
- "How is that working for you?"

2. Challenges

- "What problems are you facing?"
- "What's not working well?"
- "How is this impacting your business?"

3. Goals

- "What are your goals for this year?"
- "What are you trying to accomplish?"
- "What would success look like?"

4. Priority

- "How important is fixing this?"
- "Is this a top priority?"
- "When do you need to solve this?"

5. Budget

- "Do you have budget approved?"
- "What is your budget range?"
- "When would budget be available?"

Why Discovery Matters:

- Understand if you can help

- Build relationship
- Set expectations
- Find real needs, not assumed ones
- Position your solution properly

1. Solution Development

Once you understand their needs, you develop a solution.

Solution Development Process:

1. Analyze What You Learned

- What are their main pain points?
- What are their goals?
- What would solve their problem?

2. Match Your Solution to Their Needs

- How does your product help?
- What specific features matter to them?
- What value will they get?

3. Create Tailored Proposal

- Not generic proposal
- Specific to THEIR needs
- Addressing THEIR situation
- Showing THEIR benefits

4. Quantify Value if Possible

- "This will save you 100 hours per month"
- "This will reduce errors by 40 percent"
- "This will increase revenue by estimated 500,000 dollars"

5. Proposal and Negotiation

Presenting and finalizing the deal.

Proposal Stage:

- Formal written proposal
- Specific price and terms
- Solution details
- Expected outcomes
- Next steps

Negotiation Tips:

- Know your limits (lowest price you can go)
 - Listen to their concerns
 - Find win-win solutions
 - Don't give away everything at once
 - Get agreement on terms and timeline
-

4. Pipeline Management - 12% of Exam (About 5 questions)

This is about keeping your sales pipeline HEALTHY.

What You Need to Know:

1. Pipeline Overview

Your pipeline is ALL the deals in progress at any time.

Think of Pipeline Like:

- A funnel
- Many possibilities at top (leads)
- Fewer actual deals at bottom
- Some fall out at each stage
- Some progress to next stage

Pipeline Stages Visually:

Prospecting: 20 deals

Qualification: 15 deals

Needs Analysis: 10 deals

Proposal: 5 deals

Closed Won: 2 deals

Why Pipeline Matters:

- Shows you where deals are

- Identifies stuck deals
- Predicts future revenue
- Helps with forecasting
- Identifies bottlenecks

1. Pipeline Health

A healthy pipeline has characteristics:

1. Balanced

- Good mix of deals at each stage
- Not too many stuck in early stages
- Good progression through pipeline

2. Accurate

- Deals are in correct stages
- No fake deals inflating numbers
- Real opportunities only

3. Sufficient Volume

- Enough deals to hit quota
- Deals at different values
- Mix of large and small deals

4. Moving Forward

- Deals progress to next stage
- Not stuck in same stage
- Regular activity on each deal

Signs of Unhealthy Pipeline:

1. Too Many Old Deals

- Deals stuck in prospecting for 6 months
- No movement forward

- Customer probably moved on
2. Too Few Deals
 - Not enough volume
 - Can't reach quota
 - Need to do more prospecting
 3. Deals in Wrong Stages
 - Marked as proposal but no proposal sent
 - Marked as closed won but not closed
 - Indicates bad data
 4. Key Pipeline Metrics

Numbers that tell you about your pipeline:

1. Pipeline Value
 - Total dollar amount of all deals
 - Example: 1,000,000 dollars
2. Average Deal Size
 - Average amount per deal
 - Example: 50,000 dollars
3. Win Rate
 - Percentage of deals that close
 - Example: 30 percent (3 out of 10 deals win)
4. Sales Cycle Length
 - How long it takes to close a deal
 - Example: 3 months average
5. Stage Velocity
 - How fast deals move through each stage
 - Example: Average 2 weeks per stage

Using These Metrics:

- If pipeline value is low: Need more prospecting
- If win rate is low: Need better qualification
- If cycle is long: Need to accelerate deals
- If some stages slow: Identify bottlenecks

1. Pipeline Activities

Activities are the WORK you do to move deals forward.

Types of Activities:

1. Meetings

- Conference calls
- In-person meetings
- Video conferences
- Discovery meetings

2. Demos

- Showing product to customer
- Demonstrating how it works
- Showing value

3. Presentations

- To larger group
- To decision-makers
- Formal presentations

4. Proposals

- Written proposals sent
- Email with proposal attached
- Formal quote

5. Emails

- Follow-up emails
- Status updates
- Sending information

6. Phone Calls

- Check-in calls
- Cold calls
- Objection handling calls

7. Notes

- Recording what happened
- Recording next steps
- Recording customer feedback

Why Track Activities?

- Ensures deals don't go dormant
- Shows rep productivity
- Identifies where deals are stuck
- Helps coaches help reps

5. Forecasting - 6% of Exam (About 2-3 questions)

This is about PREDICTING future revenue.

What You Need to Know:

1. What is Forecasting?

Forecasting is the process of predicting how much revenue you'll generate in a period.

Think of it Like:

- A weather forecast predicts tomorrow's weather
- A sales forecast predicts next quarter's sales
- Based on current deals
- Based on historical data
- Based on probability of closing

1. Forecasting Methods

2. Opportunity-Based Forecasting

- Look at all opportunities
- Estimate probability of close
- Multiply opportunity value by probability
- Add them all up

Example:

Opportunity 1: 100,000 dollars, 50% probability = 50,000 dollars

Opportunity 2: 50,000 dollars, 75% probability = 37,500 dollars

Opportunity 3: 200,000 dollars, 25% probability = 50,000 dollars

Total Forecast: 137,500 dollars

1. Stage-Based Forecasting

- Each stage has expected close probability
- Prospecting = 10% chance of close
- Proposal stage = 80% chance of close
- Add values by stage

2. Historical Forecasting

- Look at what happened in past quarters
- Use that pattern to predict future
- Adjust for new factors

3. Forecasting Accuracy

Accurate forecasts require:

1. Accurate Stage Data

- Deals in correct stages
- Not inflated stages
- Realistic assessment

2. Accurate Opportunity Data

- Correct dollar amounts
- Correct close dates
- Correct customer names and details

3. Clean Data

- Old deals removed
- Closed deals marked closed
- Lost deals marked lost

4. Honest Assessment

- Realistic probability
- Not too optimistic
- Not too pessimistic

Why Forecasting Matters:

- Company can plan operations
- Can predict revenue
- Can set company expectations
- Can plan hiring
- Can manage cash flow

6. Customer Success - 9% of Exam (About 3-4 questions)

This is about keeping customers HAPPY after they buy.

What You Need to Know:

1. Post-Sale Handoff

After customer buys, there's a handoff to customer success team.

Handoff Process:

1. Contract Signed

- Deal officially closed
- Agreement finalized

- Payment received or scheduled

2. Information Passed

- All deal info to customer success team
- Customer contact information
- What they bought
- Special terms or conditions
- Customer goals and expectations

3. Onboarding Begins

- Customer success team takes over
- Getting customer started with product
- Training customer on how to use it
- Solving early issues

4. Sales Rep Steps Back

- Your job is done
- But you stay available for questions
- Relationship continues differently
- Focus on next deals now

5. Customer Onboarding

Making sure customer succeeds with your product.

Onboarding Elements:

1. Initial Setup

- Configure product for them
- Add their data
- Set up integrations
- Test everything works

2. Training

- Train users on how to use product
- Show key features
- Answer questions
- Provide documentation

3. Early Support

- Quick response to issues
- Helping them get value fast
- Building confidence

4. First Success Milestone

- Help them get first win with product
- Show value quickly
- Build credibility

5. Customer Success Metrics

How to measure if customers are successful:

1. Adoption Rate

- How many team members are using product?
- Are they using it regularly?
- How many features are they using?

2. Customer Satisfaction (CSAT)

- How happy are they with product?
- Measured on survey (1-10 scale)
- Used to identify problems

3. Net Promoter Score (NPS)

- Would they recommend you to others?
- Measured on 0-10 scale
- Scores 9-10 = promoters

- Scores 0-6 = detractors

4. Churn Rate

- What percentage cancel subscription?
- Want this number LOW
- High churn means customers not successful

5. Customer Health Score

- Overall score of customer health
- Based on usage, satisfaction, support tickets
- Green = healthy
- Red = at risk of leaving

6. Retention Strategy

Keeping customers so they don't leave.

Retention Strategies:

1. Regular Check-ins

- Monthly business review
- Quarterly planning
- Annual strategy session

2. Continued Value Delivery

- New features they need
- Training on advanced features
- Customization for their needs

3. Community Building

- User groups
- Knowledge sharing
- Peer learning

4. Proactive Support

- Fix issues before customer complains
- Anticipate needs
- Help them optimize use

5. Expansion Opportunities

- Sell additional products
- Expand to more users
- Increase usage

Why Retention Matters:

- Keeping existing customer cheaper than finding new one
 - They buy more over time
 - They refer others
 - Predictable revenue
-

IMPORTANT CONCEPTS FOR THE EXAM

Salesforce Sales Cloud Objects

Key Objects You Need to Know:

1. Lead Object

- Used for prospects
- Fields: First Name, Last Name, Company, Email, Phone
- Lead Status (Open, Contacted, Qualified, Unqualified, Converted)
- When converted, creates Contact and Account

2. Account Object

- Represents companies
- One account can have many contacts
- Fields: Account Name, Industry, Annual Revenue, Website, Phone

3. Contact Object

- Represents people

- Linked to an account
- Fields: First Name, Last Name, Email, Phone, Title
- One contact belongs to one account
- But one account has many contacts

4. Opportunity Object

- Represents deals
- Linked to an account
- Has stage field (shows progress through sales process)
- Has amount field (deal value)
- Has close date field (when expected to close)

5. Task Object

- To-do items
- Can be assigned to team members
- Tracks follow-up activities

6. Event Object

- Calendar events
- Meetings and calls
- Can be assigned and shared with team

Sales Path

Sales Path is a visual guide showing:

- Current stage
- Next stages
- Key activities for each stage
- Exit criteria (what must happen to move forward)

Benefits:

- Keeps rep focused
- Shows clear path to close

- Ensures process is followed
- Easy to see progress

Kanban View

Kanban is a visual way to manage pipeline.

How it works:

- Each stage is a column
- Each deal is a card
- Drag card to next column when it moves
- Can see all deals at once

Benefits:

- Visual pipeline
 - Easy to update deals
 - Can spot stuck deals
 - Fun to use
-

EXAM QUESTION TYPES AND EXAMPLES

Type 1: Concept Questions

Example:

"What does BANT framework stand for?"

- A. Business, Authority, Needs, Team
- B. Budget, Authority, Need, Timeline
- C. Business, Analysis, Negotiation, Terms
- D. Budget, Account, Needs, Targets

Answer: B (Budget, Authority, Need, Timeline)

Type 2: Scenario Questions

Example:

"A sales rep has 15 opportunities in their pipeline. 10 are in prospecting stage, 3 are in proposal stage, and 2 are closed won. What action should the rep take?"

- A. Focus only on closing the 2 won deals
- B. Try to move all prospecting deals to proposal

- C. Only focus on deals in proposal stage
- D. Continue prospecting while working on proposals

Answer: D (Continue prospecting while working on proposals - need steady flow of new deals)

Type 3: Best Practice Questions

Example:

"Which approach is best for multi-threaded account strategy?"

- A. Focus all communication on one key stakeholder
- B. Build relationships with multiple stakeholders across different departments
- C. Wait for stakeholder to introduce you to others
- D. Only talk to decision-makers, not influencers

Answer: B (Build relationships with multiple stakeholders)

Type 4: Process Questions

Example:

"Which step should come FIRST when qualifying a lead?"

- A. Sending a proposal
- B. Understanding their timeline
- C. Understanding their current situation and needs
- D. Setting up a demo

Answer: C (Must understand their needs before anything else)

STUDY STRATEGY: 4-Week Plan

Week 1: Learn the Basics

- Read this guide 2-3 times
- Watch YouTube videos on sales process
- Create a Trailhead account (free)
- Complete "Sales Foundation" module on Trailhead

Week 2: Deep Dive Topics

- Complete official Trailhead preparation path
- Focus on Deal Management (37% of exam)
- Understand BANT framework deeply
- Study opportunity stages

Week 3: Practice and Hands-On

- Take practice exams
- Score weak topics
- Do hands-on challenges
- Review real Salesforce scenarios

Week 4: Final Review

- Review this guide one more time
- Take final practice exam
- Score 70% or higher consistently
- Review weak areas
- Get good sleep before exam!

COMMON MISTAKES TO AVOID

Mistake 1: Confusing Lead and Opportunity

- Fix: Lead = potential, Opportunity = qualified

Mistake 2: Not understanding BANT

- Fix: Budget, Authority, Need, Timeline - memorize it

Mistake 3: Thinking discovery is just telling

- Fix: Discovery is ASKING QUESTIONS and LISTENING

Mistake 4: Not understanding multi-threading

- Fix: Build relationships with MULTIPLE people at customer

Mistake 5: Not knowing deal stages

- Fix: Learn all 10 standard opportunity stages

VOCABULARY CHEAT SHEET

Sales Cloud: Salesforce product for managing sales

CRM: Customer Relationship Management system

Lead: Prospect you've found but not yet qualified

Opportunity: Qualified lead with real potential to buy

Account: The customer company

Contact: A person at the customer company

BANT: Budget, Authority, Need, Timeline (qualification framework)

Multi-threading: Building relationships with multiple people at customer

Pipeline: All deals in progress

Forecast: Predicted future revenue

Stage: Position of deal in sales process

Qualification: Determining if prospect is worth pursuing

Discovery: Process of asking questions to understand needs

Proposal: Formal offer sent to customer

Churn: Customers leaving or canceling

Retention: Keeping existing customers

TEST DAY TIPS

Do This:

- Read questions slowly and carefully
- Look for keywords like "should," "best practice," "first"
- Eliminate obviously wrong answers first
- If unsure, make your best guess
- Manage your time: 70 minutes divided by 40 questions equals 1.75 minutes per question
- Review flagged questions if time permits

Don't Do This:

- Rush through questions
 - Second-guess yourself too much
 - Leave questions blank
 - Spend 5 minutes on one hard question
 - Panic if you don't know an answer
-

FREE STUDY RESOURCES

1. Salesforce Trailhead (100% Free)

- Search for "Sales Cloud Foundations" path
- Takes about 6-8 hours total
- Hands-on practice included

2. YouTube Channels (Free)

- Salesforce official channel
- Search "Salesforce Sales Foundations"
- "Salesforce Tips" channel

3. Trailblazer Community (Free)

- Join study groups
- Ask questions
- Connect with others

4. Practice Exams

- Trailhead has free practice questions
 - Udemy (affordable practice tests)
-

WHY THIS CERTIFICATION MATTERS

Career Benefits:

- Proves you understand sales process in Salesforce
- Entry point to sales certifications

- Helps you advance in sales role
- Helps transition to management

Sales Advancement Path After This:

- Salesforce Sales Cloud Consultant (mid-level)
 - Sales Manager roles
 - Account Executive roles
 - Director of Sales roles
-

SUMMARY: Your Quick Reference

Topic: Planning

Percent of Exam: 21%

Key: Territory planning, account segmentation, quota, resources

Topic: Customer Engagement

Percent of Exam: 15%

Key: Account strategy, multi-threading, value communication

Topic: Deal Management

Percent of Exam: 37% - THE BIGGEST SECTION

Key: Lead vs. opportunity, BANT, qualification, stages, discovery

Topic: Pipeline Management

Percent of Exam: 12%

Key: Pipeline health, metrics, activities

Topic: Forecasting

Percent of Exam: 6%

Key: Predicting revenue, probability, accuracy

Topic: Customer Success

Percent of Exam: 9%

Key: Handoff, onboarding, retention, metrics

Remember:

- 40 questions, 70 minutes
 - 62% to pass (only 25 correct needed!)
 - FREE retake if you fail
 - Focus on Deal Management (37%) and Planning (21%)
-

FINAL ENCOURAGEMENT

This is an ENTRY-LEVEL certification. You can do this!

Remember:

- Only 62% needed to pass
- FREE retake if needed
- No prerequisites
- Based on real sales process

Study Plan:

- Read this guide completely
- Complete Trailhead modules
- Take practice exams
- Get experience with real Salesforce
- Take the exam when you're consistently scoring 70% or higher

Good luck! You've got this!

Now go study and pass that exam!