

Prepare for your Sales Cloud Consultant Certification Exam (CRT251)

OEM: Salesforce • Duration: 1 Day (8 hrs) • Code: CON-201

COURSE MODULES & TOPICS

Module 1: Introduction and Overview

- Review exam objectives
- Follow Sales Cloud fast path
- Discuss implementation strategies
- Understand the value of business analysis

Module 2: Account and Contact Management

- Describe Accounts and Contacts
- Define Enterprise Territory Management
- Determine Account Access

Module 3: Campaign and Lead Management

- Understand Campaign Influence and lifecycle
- Convert Leads
- Assess Lead Data Quality
- Report on Leads

Module 4: Opportunity Management

- Follow Custom Paths
- Plan Product Schedules
- Organize Products, Price Books, and Quotes
- Advanced Currency Management

Module 5: Forecasting

- Generate Collaborative Forecasts
- Conduct Historical Trend Reporting
- Build Custom Report Types
- Design Reporting Snapshots

Module 6: Sales Productivity

- Assess Sales Productivity Features
- Integrate with Outlook and Gmail
- Navigate the Lightning Sales Console
- Collaborate with Chatter
- Boost Sales Productivity with Quip and Enhanced Notes

Module 7: Integration and Data Management

- Follow Data Migration Steps and Tools
- Handle Large Data Volumes
- Determine Integration Options
- Harness Skinny Tables
- Improve Report Performance

Module 8: Practice Exam

- Review certification objectives
- Practice exam questions and answers