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Salesforce Certified Sales Representative

Salesforce Salesforce-Sales-Representative

Version Demo

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Topic Break Down

Topic	No. of Questions
Topic 1, Planning	21
Topic 2, Customer Engagement	74
Topic 3, Deal Management	29
Topic 4, Pipeline Management	15
Topic 5, Forecasting	5
Total	144

QUESTION NO: 1

What are the key elements of a successful cold call?

- A. Several short questions and a shared link to product descriptions on the company website
- B. A compelling hook that ties in a product or service and open-ended questions
- C. Details about the decision maker and a follow-up with them soon after the call

ANSWER: B

Explanation:

A compelling hook that ties in a product or service and open-ended questions is correct because an effective cold call must quickly earn the prospect's attention and create a relevant conversation. The hook should be concise and tailored to a likely business need, challenge, or outcome the prospect cares about. Rather than launching into a full product description, a sales representative uses this opening to establish why the conversation may be worthwhile for that specific person.

Open-ended questions then help the representative discover the prospect's current situation, priorities, pain points, goals, and buying process in the prospect's own words. This supports active listening and enables meaningful qualification, rather than making assumptions about fit. For example, asking how the team currently handles a process or what outcome they are trying to improve invites useful detail that can guide the next part of the discussion. Together, a relevant hook and discovery-oriented questions build engagement, demonstrate a consultative approach, and help determine an appropriate next step, such as a follow-up meeting. Salesforce's sales learning materials emphasize preparing for prospect conversations, leading with customer value, and using discovery to understand needs. See [Sales Rep Training on Trailhead](#) and [Sales Lead Generation on Trailhead](#).

QUESTION NO: 2

After a successful sale of their latest software product, a sales representative wants to nurture their long-term relationship with the customer by driving product

adoption.

What success metric for product adoption can the sales rep use?

- A. Session duration
- B. User login rates
- C. Number of users assigned a license

ANSWER: B

Explanation:

User login rates are an effective product-adoption success metric because they show whether licensed users are returning to and actively accessing the product over time. Adoption is not established merely when a customer purchases a product or receives user access; it is demonstrated when people incorporate the product into their regular work. Monitoring login activity lets a sales representative identify engagement patterns, such as a healthy, sustained level of use after onboarding or a drop in activity that could signal a need for training, enablement, or a customer check-in.

Login-rate data is especially useful for managing a long-term customer relationship because it gives the representative an objective indicator to pair with customer conversations about outcomes and value realization. The representative can use the trend to coordinate appropriate follow-up, connect the customer with relevant resources, and support progress toward the customer's goals. Salesforce emphasizes using customer data and engagement signals to understand usage and help customers achieve value throughout their lifecycle. See Salesforce Trailhead's guidance on [customer success strategies](#) and Salesforce's [customer success resources](#).

QUESTION NO: 3

A sales representative recently closed a deal and wants to measure how likely the customer would be to recommend the product.

Which measurements should the sales rep use?

- A. Net Promoter Score (NPS)
- B. Customer Satisfaction Survey (CSAT)
- C. Customer Engagement Score (CES)

ANSWER: A

Explanation:

Net Promoter Score (NPS) is the appropriate measurement because it is specifically designed to assess a customer's willingness to recommend a company, product, or service to another person. The standard NPS question asks customers, on a scale from 0 through 10, how likely they are to recommend the organization or offering to a friend or colleague. Responses are grouped into promoters, who select 9 or 10; passives, who select 7 or 8; and detractors, who select 0 through 6. The score is calculated by subtracting the percentage of detractors from the percentage of promoters, resulting in a value from -100 to 100.

For a sales representative who has just closed a deal, this measurement provides a clear indicator of customer advocacy and relationship strength. It can help identify customers who may be willing to provide referrals, reviews, testimonials, or references, while also surfacing feedback that can guide follow-up and improve the customer experience. Salesforce's customer-success guidance recognizes NPS as a widely used loyalty metric based on recommendation intent. Learn more from [Salesforce's overview of Net Promoter Score](#) and the [Net Promoter System explanation of NPS](#).

QUESTION NO: 4

A sales representative is aware of an upcoming end-of-contract period for a key customer.

How should the sales rep adapt their sales activities to address this change?

- A. Wait for the contract to expire before engaging with the customer.
- B. Focus on finding new customers to replace the potentially lost contract.
- C. Proactively engage with the customer to renew or expand the contract.

ANSWER: C

Explanation:

Proactively engage with the customer to renew or expand the contract is the appropriate response because an approaching contract end date is a critical customer-retention and growth milestone. The sales representative should begin a timely conversation with the customer well before expiration to review realized value, confirm business priorities, understand any changes in needs, and identify the path for continued partnership. This engagement creates an opportunity to address concerns early, coordinate the appropriate internal resources, and make renewal discussions relevant to the customer's desired outcomes.

A proactive approach also supports expansion when the customer's evolving requirements, adoption, users, products, or services indicate that additional value can be delivered. By aligning the renewal or expansion proposal to documented outcomes and future goals, the representative can help the customer make an informed decision while maintaining continuity in the relationship. Salesforce's account-management guidance emphasizes managing renewals through ongoing customer engagement and value-focused conversations. More broadly, Salesforce describes customer success as helping customers achieve value throughout their relationship, which is particularly important as a contract period closes. See [Salesforce account management guidance](#) and [Salesforce customer success guidance](#).

QUESTION NO: 5

A sales representative learns from a survey that a strategic customer has a low satisfaction score because they are using only some of the products in their contract.

What should the sales rep do first to improve customer satisfaction?

- A. Offer a comprehensive demo of the products to the customer.
- B. Encourage the customer to purchase additional products.
- C. Add the customer to an educational marketing campaign.

ANSWER: C

Explanation:

Add the customer to an educational marketing campaign. The survey identifies a product-adoption gap: the customer already owns products and is not realizing their full value because only some contracted capabilities are being used. The first priority is therefore to help the customer discover, understand, and successfully adopt the products they have purchased. An educational campaign can deliver timely, relevant guidance such as onboarding resources, feature tutorials, use-case content, webinars, and invitations to training. This approach supports the customer at scale while giving the sales representative useful engagement signals for a later, more tailored conversation.

Improving adoption strengthens the customer's ability to achieve intended outcomes, which is a core driver of satisfaction, retention, and long-term account health. It also lets the sales representative build a credible understanding of which resources the customer uses and where further enablement is needed. After the customer is gaining value from the current contract, the representative can work with them on broader goals and identify appropriate future opportunities. Salesforce's customer-success guidance emphasizes helping customers realize value and drive adoption throughout their journey. See [Salesforce Customer Success resources](#) and the [Customer Success Basics Trailhead module](#).

QUESTION NO: 6

An experienced sales representative has several new leads and wants to understand their pain points and decide if the company can meet their needs.

At which stage should the sales rep complete a qualification call with the new leads?

- A. Prospecting
- B. Relationship building
- C. Research

ANSWER: A

Explanation:

Prospecting is the appropriate stage for a qualification call. At this point, the sales representative engages new leads to determine whether there is a meaningful potential fit before committing substantial time and resources to a full sales cycle. A qualification conversation is designed to uncover the prospect's business challenges, pain points, needs, priorities, decision process, timing, and ability to purchase. It also lets the representative assess whether the company's offerings can realistically provide value and whether the lead meets the organization's ideal customer and lead-qualification criteria.

Effective qualification is an early sales activity because it helps the representative focus follow-up effort on leads that are both a good fit and sufficiently interested. The information gained in the call can be recorded on the lead and used to determine the appropriate next action, such as nurturing, scheduling a deeper discovery discussion, or converting a qualified lead when it is ready to become an account, contact, and opportunity. Salesforce describes leads as people or companies that may be interested in what a business sells and supports qualifying and converting them as they become sales-ready. See [Salesforce Help: Leads](#) and [Trailhead: Convert and Work with Leads](#).

QUESTION NO: 7

What is the primary benefit of team selling at a key account?

- A. Provides the customer with multiple points of contact
- B. Reduces the workload for individual sales representatives
- C. Leverages collective expertise to meet customer expectations

ANSWER: C

Explanation:

The primary benefit of team selling at a key account is that it leverages collective expertise to meet customer expectations. Key accounts commonly have complex requirements that span products, implementation, service, technical considerations, commercial terms, and executive-level business goals. A coordinated selling team brings together people with the relevant knowledge and authority to understand those needs and create a solution tailored to the customer's priorities. This approach enables more informed conversations, better alignment with stakeholders across the customer organization, and a stronger ability to demonstrate value throughout the relationship. Salesforce's key-account relationship guidance emphasizes understanding the account, collaborating across teams, and delivering value that supports a long-term, trusted partnership. Using collective expertise also helps the sales organization present a consistent, customer-centered experience rather than relying on one representative to address every specialized need. Learn more about relationship-building and collaborative selling practices in Salesforce Trailhead's [Sales Representative training](#) and Salesforce's [key account management guidance](#).

QUESTION NO: 8

A sales representative is negotiating with a customer to renew their agreement. Historically, the customer has been unwilling to purchase additional products due to cost concerns.

Which type of strategy should the sales rep use?

- A. Competitor-based pricing
- B. Bundle pricing
- C. Price skimming

ANSWER: B

Explanation:

Bundle pricing is the appropriate strategy because it packages related products or services together at a combined price that is typically more attractive than purchasing each item separately. For a renewing customer with established cost concerns, the representative should focus the conversation on the total value and practical outcomes the customer receives from an integrated solution. A bundle can make adding products feel like a cost-effective extension of the existing agreement rather than a series of separate, incremental expenses.

This approach also supports cross-selling during a renewal: the representative can align complementary offerings to the customer's needs, demonstrate how the products work together, and present a clear commercial proposal with predictable pricing. The customer can evaluate one cohesive solution and its overall business value, while potentially realizing savings compared with standalone purchases. Salesforce's sales training emphasizes matching a proposed solution and its value to customer needs during negotiation and closing. See Salesforce Trailhead's [Sales Rep Training: Negotiate and Close](#) and its guidance on [Sales Strategies and Tactics](#).

QUESTION NO: 9

In which way should a sales representative drive trust through professional competency?

- A. Asking questions to look for common interests, personal motivators, and hesitation
- B. Collecting and processing information on products, competitors, and industries

C. Understanding the buyer's experience in the market and years of service

ANSWER: B

Explanation:

Collecting and processing information on products, competitors, and industries is the strongest way for a sales representative to build trust through professional competency. Professional competency means bringing relevant, accurate, and usable expertise to customer conversations. A representative who understands their own offerings can clearly connect capabilities to the customer's priorities, use cases, and business outcomes. Knowledge of competitors helps the representative position solutions credibly and respond thoughtfully when alternatives are being evaluated. Industry knowledge adds essential context, enabling the representative to recognize market pressures, trends, terminology, and challenges that affect the customer's decisions.

This preparation creates customer value because the representative can offer informed guidance rather than generic product statements. It also supports confidence and credibility: customers are more likely to trust recommendations when they are based on a well-rounded understanding of the customer's environment and available choices. Salesforce's Sales Representative certification preparation materials identify professional competency as a trust-building behavior grounded in collecting and processing this type of information. See the [Sales Representative Certification Prep](#) module and Salesforce's [sales strategy resources](#) for related guidance on informed, customer-centered selling.

QUESTION NO: 10

A sales representative wants to transition to a recommendation in a way that demonstrates their ability to provide a competitive solution.

What should they use?

- A. Summary statement
- B. Success story
- C. Solution unit

ANSWER: B

Explanation:

Success story is the appropriate tool for moving from discovery into a recommendation while demonstrating a competitive solution. A success story connects the customer's needs to a credible, real-world example of how a comparable customer addressed a similar challenge and achieved meaningful business results. Rather than merely describing what the seller can offer, it provides evidence of the value the solution can deliver in practice.

Used at the transition point in a sales conversation, the story helps the representative establish relevance and credibility before presenting the recommendation. The representative can frame the story around the similar customer's situation, the actions or solution they adopted, and the measurable outcomes they achieved. This makes the proposed direction more tangible for the buyer and reinforces the seller's ability to address the customer's priorities in a differentiated, competitive way. It can also create confidence by showing that the recommendation is grounded in proven customer outcomes, not just product claims.

Salesforce's customer-engagement learning materials emphasize using customer stories to make conversations relevant and demonstrate value through outcomes. See [Sales Rep Training: Customer Engagement](#) and the [Salesforce Certified Sales Representative credential](#) page.

QUESTION NO: 11

A junior sales representative engages with key accounts to understand their pain points, current solutions, and future goals.

Which skill is the sales rep growing?

- A. Product knowledge
- B. Business acumen
- C. Sales acumen

ANSWER: B

Explanation:

Business acumen is the skill being developed because the representative is learning how the customer's organization operates, what business problems it needs to solve, what solutions it uses today, and where it intends to go. This understanding enables a seller to connect a proposed solution to meaningful customer outcomes rather than simply describe features. In a key-account context, business acumen also means recognizing the customer's strategic priorities, operating environment, stakeholders, and measures of success. By asking about pain points and future goals, the representative builds the context needed to have a relevant, value-focused conversation and to position recommendations around the account's business needs.

Salesforce emphasizes discovery as a way to understand a customer's challenges, goals, and desired outcomes before tailoring a solution. Those discovery conversations provide the customer and industry insight that underpins strong business acumen. As the representative gathers this information across key accounts, they become better able to identify where their offering can create business value and support the customer's broader strategy. See Salesforce Trailhead's guidance on [discovering customer needs](#) and its overview of [sales strategy fundamentals](#).

QUESTION NO: 12

A sales representative is having a difficult conversation with a customer who is delaying making a decision to move forward without providing much detail.

What should the sales rep do to uncover why the customer is delaying the decision?

- A. Highlight the benefits of the product to the customer.
- B. Ask pointed questions to identify customer interests.
- C. Discuss the customer's concerns with their internal team.

ANSWER: B

Explanation:

Ask pointed questions to identify customer interests. When a customer delays a decision without sharing detail, the representative should use direct, specific, open-ended questions to understand the underlying situation before attempting to advance the sale. This approach creates space for the customer to articulate priorities, desired outcomes, decision criteria, timing constraints, stakeholder needs, or unresolved concerns. For example, the representative might ask what would need to be true for the customer to feel comfortable moving ahead, whether priorities have changed, or what information is still needed to make a decision. Active listening and thoughtful follow-up questions then help clarify the real reason for the delay and demonstrate that the conversation is centered on the customer's needs. Salesforce describes discovery questions as a means to learn about a buyer's needs, goals, and challenges so the seller can provide relevant value. Identifying those interests is especially important in a difficult conversation because it replaces assumptions with customer-provided context and enables an appropriate, customer-focused next step. See Salesforce's guidance on [sales questions](#) and its [consultative selling approach](#).

QUESTION NO: 13

A customer has questions about the features of one product they are evaluating.

What is the first step the sales representative should take to address this?

- A. Supply product references.

- B. Schedule new product demo.
- C. Dispatch service technician.

ANSWER: A

Explanation:

Supply product references. is the appropriate first step because the customer is actively evaluating a specific product and needs confidence in its features, practical value, and fit for their situation. Relevant customer stories, use cases, testimonials, or reference accounts provide credible third-party evidence of how those features are used in real business environments. A sales representative should select references that align with the customer's industry, business challenge, and intended use of the product, then use them to address the customer's questions with concrete outcomes and proof points. This approach helps the buyer understand feature value in context while building trust through the experiences of comparable organizations. Salesforce describes customer stories as examples of organizations using Salesforce to solve business challenges and achieve measurable results; these resources can support a value-based discussion during product evaluation. The representative can then use the customer's follow-up questions to tailor any subsequent conversation or demonstration to the features that matter most. See Salesforce's [Customer Success Stories](#) and its guidance on [customer stories](#).

QUESTION NO: 14

How does understanding a customer's business strategies and goals help a sales representative scope a solution?

- A. Helps predict if the opportunity will close in the current quarter
- B. Tailors the sales pitch and offers to align with the customers objectives
- C. Allows the sales rep to move on to their next deal more quickly

ANSWER: B

Explanation:

Tailors the sales pitch and offers to align with the customers objectives is correct because effective solution scoping begins with understanding what the customer is trying to accomplish at a business level. A sales representative can connect the organization's stated strategies, priorities, and desired outcomes to relevant Salesforce capabilities, services, and commercial options. This creates a value-based recommendation rather than a generic product presentation. For example, if a customer's strategic goal is to improve seller productivity and pipeline visibility, the representative can scope capabilities that support guided selling, activity management, forecasting, and actionable reporting, while framing their value in terms of the customer's intended business results. Understanding goals also helps the representative ask more relevant discovery questions, prioritize the needs that matter most, and establish shared success measures for the proposed solution. Salesforce's sales guidance emphasizes learning about the customer's business, challenges, and objectives so that sellers can align a proposed solution to customer value and outcomes. See [Salesforce Trailhead: Discover Customer Needs](#) and [Salesforce Trailhead: Position Your Solution](#).