



Certification Exam Guide

# SALESFORCE CERTIFIED EDUCATION CLOUD CONSULTANT

Spring '19 – Beta

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## **ABOUT THE SALESFORCE CERTIFIED EDUCATION CLOUD CONSULTANT PROGRAM**

The Salesforce Certified Education Cloud Consultant program is designed for consultants who have experience implementing Salesforce Education Cloud solutions in a customer-facing role. The Salesforce Certified Education Cloud Consultant is able to successfully design and implement Education Cloud solutions that meet customer business requirements, are maintainable and scalable, and contribute to long-term customer success.

This Beta exam guide provides information about the Salesforce Certified Education Cloud Consultant exam.

## SECTION 1. PURPOSE OF THIS BETA EXAM GUIDE

This Beta exam guide is designed to help you evaluate your readiness to successfully complete the Salesforce Certified Education Cloud Consultant Beta exam. This guide provides information about the target audience for the certification exam, 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 Beta exam.

## SECTION 2. AUDIENCE DESCRIPTION: SALESFORCE CERTIFIED EDUCATION CLOUD CONSULTANT

A Salesforce Education Cloud Consultant designs and deploys solutions that support customer business processes and requirements using Salesforce Education Cloud. The consultant has experience designing solutions that optimize the Education Cloud functionality and can lead the implementation of these solutions within a higher education institution. The consultant has experience consulting with higher education institutions and has expertise in Salesforce applications, including the knowledge needed to implement multiple applications in common customer scenarios.

The successful candidate has experience with common consulting practices such as solution design, problem solving, troubleshooting common technical and design challenges, facilitation skills, requirements gathering, application of best practices, ability to manage project timelines and deliverables, and implementation methodologies.

Salesforce Certified Education Cloud Consultants are interested in demonstrating their expertise as cloud computing implementation consultants, with a specialty in Education Cloud. The Salesforce Certified Education Cloud Consultant has the following experience:

- 2+ years of Salesforce Platform experience
- 1+ years of Salesforce implementation experience for higher education institutions
- Implemented and supported at least one project involving Higher Education Data Architecture (HEDA)

In addition, the Salesforce Education Cloud Consultant has the following skills:

- Experience managing implementation projects for higher education
- Strong analytical and problem-solving skills
- Deep knowledge of Salesforce product lines
- Solid understanding of internet technologies and cloud computing
- Solid understanding of data management and database concepts
- Fundamental understanding of common integrations and higher education-specific source systems
- Familiarity with governance and change management concepts
- Familiarity with the various lifecycles (recruitment and admissions, student success, advancement) that support the student experience
- Familiarity with the software development lifecycle
- Understanding of Salesforce org strategy and how to build incrementally to serve a university's needs

The Salesforce Education Cloud Consultant also has demonstrated the following abilities:

- Install, configure, and customize Salesforce Education Cloud solutions for higher education.

- Incorporate core Salesforce products like Sales Cloud, Service Cloud, Marketing Cloud, Pardot, Community Cloud, and Quip with HEDA.
- Ensure seamless operational continuity between core products and HEDA.
- Understand limitations, product compatibility, and the application of best practices.
- Discuss integration implications and migrate data into an instance with HEDA installed.

A candidate for this exam will likely need assistance with:

- Architecting an integration solution
- Implementing Marketing Cloud, Social Studio and Pardot
- Implementing Community Cloud
- Performing advanced data management tasks
- Advanced understanding of large data volume considerations and solutions

A candidate for this exam is not expected to know how to do the following:

- Custom code (Apex, Aura) development
- Packaging of managed applications
- Training curriculum development and delivery
- K-12 education
- Consultant-level knowledge of Marketing Cloud, Pardot, Community Cloud, and Nonprofit Cloud

Typical job roles a Salesforce Certified Education Cloud Consultant candidate may include:

- Business Analyst
- Consultant
- Program Manager
- Application/Solution Architect
- Developer
- Engagement Manager
- Project Manager
- Database Administrator
- System Analyst
- Technical Architect

## SECTION 3. ABOUT THE BETA EXAM

The Salesforce Certified Education Cloud Consultant Beta exam has the following characteristics:

- Content: 120 multiple-choice/multiple-select questions
- Time allotted to complete the exam: 160 minutes
- Passing Score: TBD
- Registration fee: No Charge
- Retake fee: Not Applicable
- References: No hard-copy or online materials may be referenced during the exam.
- Delivery Options: Proctored exam delivered onsite at a testing center. Click [here](#) for information on scheduling an exam.
- Prerequisite: Hold current Salesforce Certified Administrator credential
- Please 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 Beta exam, Salesforce recommends a combination of: hands-on experience as an Education Cloud Consultant or similar expertise, Trailhead trails, and self-study in the areas listed in the Exam Outline section of this exam guide.

The following are links to self-study resources that are associated with the areas listed in the Exam Outline section of this exam guide:

- [Higher Education Data Architecture \(HEDA\) Documentation](#)
- [Salesforce Advisor Link \(SAL\) Documentation](#)

To review online Documentation, Tip Sheets, and User Guides, search for the topics listed in the Exam Outline section of the exam guide and study the information related to those topics. Documentation, Tip Sheets, and User Guides can also be accessed through **Help & Training**.

Check out the official [Certification Trailmix](#) for this credential. We have included essential Trailhead learning specifically with you in mind.

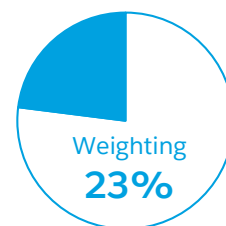


## SECTION 5. EXAM OUTLINE

The Salesforce Certified Education Cloud Consultant exam measures a candidate's knowledge and skills related to the following objectives. A candidate should have hands-on experience implementing Education Cloud solutions and be able to demonstrate knowledge and expertise in each of the areas below.

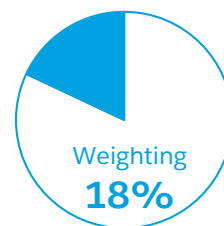
### EDUCATION CLOUD APPLICATIONS, SETTINGS, AND CONFIGURATION

- Explain the capabilities and limitations of Higher Education Data Architecture (HEDA), including compatibility with other Salesforce products and features.
- Install and configure HEDA.
- Install and configure Salesforce Advisor Link (SAL).



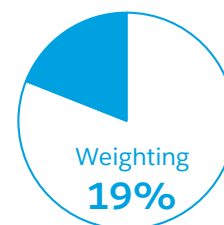
### IMPLEMENTATION STRATEGIES

- Given a scenario, determine how to facilitate a successful implementation (plan, gather requirements, design, build, test, document, deploy, and optimize).
- Advise on governance, change management, staffing, and adoption best practices including community resources for long-term solution success.
- Given a scenario, identify timing considerations for a successful deployment.



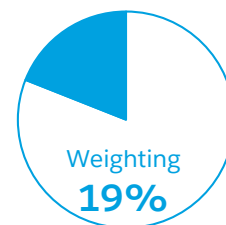
### SOLUTION DESIGN

- Explain the similarities, differences, and relationships between HEDA account models, and standard Salesforce Account-Contact data models.
- Given a scenario, design an appropriate and scalable solution for a higher education customer.
- Identify the available open source community solutions that exist and where to find them.
- Given a scenario, determine when it is appropriate to use HEDA, other Salesforce solutions, community open source solutions, and third-party applications.



### DOMAIN EXPERTISE

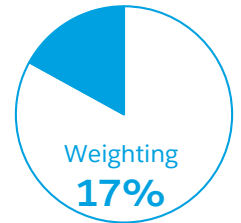
- Given a business challenge, determine the Salesforce solutions that satisfy customer requirements for marketing and engagement.
- Given a business challenge, determine the Salesforce solutions that satisfy customer requirements for recruitment and admissions.



- Given a business challenge, determine the Salesforce solutions that satisfy customer requirements for student success.
- Given a business challenge, determine the Salesforce solutions that satisfy customer requirements for advancement and alumni relations.

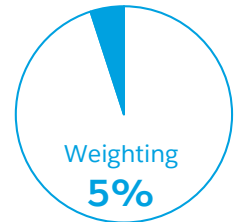
## INTEGRATION AND DATA MANAGEMENT

- Given a scenario, explain integration considerations for connecting higher education systems in an Education Cloud implementation.
- Given a scenario, explain data migration considerations in Education Cloud.
- Given a scenario, analyze the implications and design considerations of large data volumes.
- Given a scenario, explain data management considerations in Education Cloud.



## ANALYTICS

- Given a scenario, determine the appropriate reporting solution in Education Cloud.
- Given a scenario, explain the security and data visibility considerations when designing reports and dashboards to serve different personas.



## SECTION 6. SAMPLE EXAM QUESTIONS

The following questions are representative of those on the Salesforce Certified Education 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 this set of questions.

1. A university plans to use HEDA for student engagement. The university wants to use the recommended default account model for HEDA and wants to have a 1-1 relationship between the account and contact.

Which model should the consultant recommend?

*Choose One*

- A) Administrative
- B) Household
- C) Educational Institution
- D) Person

2. A consultant is working with a university on a Salesforce Advisor Link (SAL) implementation. SAL will operate as the system of record for advising data. Advising notes do not need to be in the SIS. The university's IT team wants a high-level integration approach between Salesforce and the systems of record.

What should the consultant advise?

*Choose One*

- A) Integrate student GPA, degree, and coursework information from the SIS to Salesforce.
- B) Integrate student GPA, degree, and coursework information from the Finance system to Salesforce.
- C) Integrate student employment, advisor, and faculty information from the HR system to Salesforce.
- D) Integrate student information and advisor notes from Salesforce to the SIS.

3. A university needs Salesforce to replace its legacy CRM student engagement system. The IT department wants a planned, sequential approach. It is critical that system requirements are collected before the integration configuration is done.

Which implementation method should the consultant recommend?

*Choose One*

- A) Waterfall
- B) Agile
- C) Critical Path
- D) RACI

4. An institution is providing career resources to alumni. The institution wants to consolidate this information to one place where alumni search for other alumni, create groups for networking, and access articles about job placement.

What Salesforce product is designed to meet these needs?

*Choose One*

- A) Community Cloud
- B) Higher Education Data Model
- C) Social Studio
- D) Nonprofit Cloud

5. A university customer has been using HEDA for a while and has just engaged a consultant to add Salesforce Advisor Link (SAL). The consultant is preparing to install SAL.

Which two things should the consultant check to determine if the customer's org is ready for the implementation?

*Choose Two*

- A) If the latest version of HEDA is installed
- B) If Lightning Experience is enabled in the org
- C) If the default account model in HEDA is set to Household
- D) If the Default Active Student Record Type is set to Student

## SECTION 7. ANSWERS TO SAMPLE EXAM QUESTIONS

1. A
2. A
3. A
4. A
5. A and B

## SECTION 8. MAINTAINING A CERTIFICATION

One of the benefits of holding a Salesforce credential is always being up to date on new product releases. Our release exams are designed to ensure you have the latest information you need to be a successful Salesforce Certified expert.

Bookmark these useful resources for maintaining your credentials:

- [Maintenance Exam Due Dates](#)
- [Verify Your Certification Status](#)
- [Overall Maintenance Requirements](#)

**Don't let your hard-earned credential expire!** Once you earn the credential, if you do not complete all maintenance requirements by the due date, your credential will expire, or in some cases, become suspended. For more information, click [here](#).

### ABOUT TRAILHEAD

Trailhead is your path into the Salesforce economy. It's the fun way to learn the skills you need to transform your company, earn credentials that grow your career, and connect with a global movement of Trailblazers to continue learning together.

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*The fun way to  
learn Salesforce*

#### LEARN

Learn at your own pace,  
from our experts, and  
your peers.



#### EARN

Earn points, badges, and  
skill-based credentials  
that grow your resume.

#### CONNECT

Connect with fellow  
Trailblazers to learn, inspire,  
and blaze new trails.

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