



Certification Exam Guide

# SALESFORCE CERTIFIED NONPROFIT CLOUD CONSULTANT

Winter '19

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

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

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

## SECTION 1. PURPOSE OF THIS EXAM GUIDE

This exam guide is designed to help you evaluate your readiness to successfully complete the Certified Nonprofit 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 NONPROFIT CLOUD CONSULTANT

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

Salesforce Certified Nonprofit Cloud Consultants are interested in demonstrating their expertise as cloud computing implementation consultants; with a specialty in nonprofits. 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
- Working knowledge of Salesforce product lines
- Solid understanding of internet technologies and cloud computing
- Solid understanding of data management and database concepts
- Familiarity with the software development lifecycle
- Nonprofit Domain expertise
- How salesforce solutions interact with the nonprofit success pack

Proven ability to:

- Design and implement successful solutions
- Anticipate and mitigate risk
- Meet and manage customer expectations
- Increase customer confidence
- Consistently deliver effective business results
- 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
- Train the customer on the new business processes in the solution

## SECTION 3. ABOUT THE EXAM

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

- Content: 60 multiple-choice/multiple-select questions
- Time allotted to complete the exam: 90 minutes
- Passing score: 63%
- Registration fee: USD 200, plus applicable taxes as required per local law
- Retake fee: USD 100, plus applicable taxes as required per local law
- References: No hard-copy or online materials may be referenced during the exam.
- Delivery options: Proctored exam delivered onsite at a testing center or in an online proctored environment. Click [here](#) for information on scheduling an exam.
- Prerequisite: 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 exam, Salesforce recommends a combination of: hands-on experience, Trailhead trails, and self-study in the areas listed in the Exam Outline section of this exam guide.

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**.

Trailhead can be accessed [here](#).

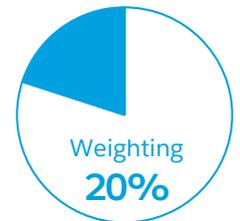
Check out the official [Certification Trailmix](#) for this credential. We have included essential Trailhead learning specifically with you in mind.

## SECTION 5. EXAM OUTLINE

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

### NPSP SETTINGS AND ADMINISTRATION

- Given a set of requirements, use NPSP Settings for people (Leads, Contacts, and Accounts) management defaults.
- Given a set of requirements, use NPSP Settings to set up and troubleshoot Relationships.
- Given a set of requirements, use the NPSP Settings to set up donation (Opportunity) management defaults.
- Given a user requirement to track on-going (more than one) donations in Salesforce, use the NPSP Settings to enable recurring giving functionality that meets the requirements.
- Given an error message through NPSP, determine whether it is an NPSP issue and appropriate next steps
- Given a requirement to ensure system cleanliness, run the Health Check tool and implement recommended changes.
- Explain the differences between the NPSP release schedule and the Salesforce release schedule, including considerations for declarative and custom development during the deployment stage of an implementation.
- Given a requirement to manage multiple addresses for a nonprofit constituent, be able to define the Address Management functionality and configure the standard state and country picklists functionality to work with the Address, Contact, and Account objects.
- Install and configure NPSP according to best practices in an existing Salesforce org
- Create or modify customizable rollups using best practices for a salesforce org with NPSP 3.0 installed and on the latest version.



### NONPROFIT CLOUD DATA MANAGEMENT

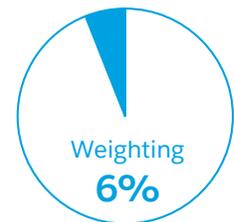
- Given a specific data requirement from a nonprofit, explain the use cases and considerations for using Salesforce Data Loader, NPSP Data Importer, or the Salesforce Import Wizard.
- Given customer requirements, explain the data integration use cases and considerations for a Nonprofit Cloud implementation.
- Given a size of records and files for an implementation, identify if the implementation will require additional solution design due to large data volumes.



- Identify what duplicate management tools to use for a salesforce implementation, considering common nonprofit needs and compatibility with the various NPSP data models.
- Given a set of business requirements, recommend data management strategies that align with Salesforce best practices.
- Given a situation in which data needs to be imported to the system, use the NPSP settings at appropriate times during the data loading process to refresh opportunities, recurring donations, and levels.

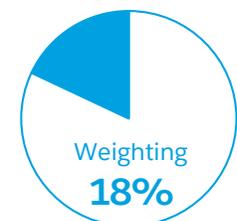
### NONPROFIT CLOUD ANALYTICS

- Given a business requirement to create a report that shows donors who previously donated money but have not yet this year, identify the best way to approach that.
- Given a set of desired metrics (including roles, levels, account data model), determine the appropriate report, dashboard, or reporting snapshot solution.
- Given a scenario that involves reporting on year over year giving at a point in time, determine the correct way to achieve that (with a reporting snapshot).



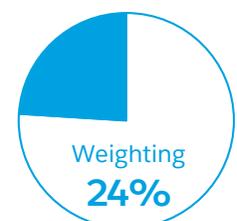
### DOMAIN EXPERTISE

- Given a specific business challenge, identify the correct Salesforce solutions that satisfy customer requirements for fundraising and donor management.
- Given a specific business challenge, identify the correct Salesforce solutions that satisfy customer requirements for marketing and engagement.
- Given a specific business challenge, identify the correct Salesforce solutions that satisfy customer requirements for program management.
- Given a specific business challenge, identify the correct Salesforce solutions that satisfy customer requirements for volunteer management.
- Given customer requirements, build role-based analytics that satisfy customer requirements.
- For customers seeking Salesforce resources, distinguish and rationalize the purpose for resource sites like the Power of Us Hub, Trailblazer Community, Trailhead, and AppExchange.



### NONPROFIT CLOUD SOLUTION DESIGN

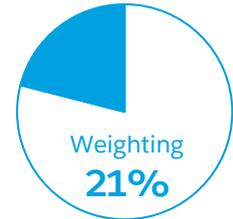
- Given a set of business requirements, determine the Salesforce product(s) to be used for the solution.
- Given a set of business requirements, determine when it is appropriate to use declarative development (clicks), custom code, or a 3rd party solution.
- Given a scenario, analyze customer requirements to determine an appropriate solution design considering capabilities, limitations, and design trade-offs.



- Given a set of fundraising business requirements, determine what functionality in NPSP should be used for the solution.
- Given a set of business requirements related to data security, determine what security features should be used.

## NONPROFIT IMPLEMENTATION STRATEGIES AND BEST PRACTICES

- Given a scenario, determine how to facilitate a successful Nonprofit Cloud consulting engagement (plan, gather requirements, design, build, test, and document).
- Given customer background information, gather requirements, create user stories, and developer business processes into system requirements.
- Given customer requirements, design a solution based on best practices for governance.
- Given a simple set of business requirements, determine the appropriate account model for a nonprofit customer.
- Given a planned solution, create a test environment plan with specific environments.
- Given a solution scenario, determine what deployment tools and strategy would be used.



## SECTION 6. SAMPLE EXAM QUESTIONS

The following questions are representative of those on the Salesforce Certified Nonprofit 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 nonprofit organization wants to use Salesforce to track community leaders, their constituents, and other relationships.

Which account model should the consultant recommend?

- A) Salesforce Standard Account
- B) Individual (“Bucket”) Account
- C) Person Account
- D) Household Account

2. A nonprofit organization is using NPSP in Lightning Experience and wants to create a household mailing list for its direct mail campaign. The nonprofit organization does not want to send the same piece of mail more than once to a given address.

Which two actions should the consultant take?

- A) Ensure the Household Mailing List action is available on Campaigns.
- B) Ensure the Household Mailing List action is available on Accounts.
- C) Export the NPSP Campaign Household Mailing List v2 report.
- D) Export the NPSP Household with Giving Totals report.

3. A donation specialist works with several major donors. For each event, the donation specialist needs to track a set of activities for each major donor. It includes action items like send the donor an invitation, confirm their attendance, email them a reminder, and send them a thank you note after the event.

Which solution should the consultant recommend?

- A) Campaigns
- B) Tasks
- C) Events
- D) Engagement Plans

## SECTION 7. ANSWERS TO SAMPLE EXAM QUESTIONS

1. D
2. A C
3. D

## 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

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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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