Salesforce Certified Business Analyst

Salesforce Certified-Business-Analyst

Version Demo

Total Demo Questions: 36

Total Premium Questions: 362

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Topic Break Down

Topic	No. of Questions
Topic 1, Customer Discovery	67
Topic 2, Collaboration with Stakeholders	69
Topic 3, Business Process Mapping	52
Topic 4, Requirements	107
Topic 5, User Acceptance	45
Topic 6, Mix Questions	22
Total	362

QUESTION NO: 1

Universal Containers (UC) stores information about its containers in the standard Salesforce Product object. UC deals with data integrity issues, such as the Container Color field fails to update on all containers when the color is updated on a Container Product Line. The project owner mentioned that a previous consultant recommended that UC move to a more normalized data model to represent its containers.

What should the business analyst review to learn more about the previous consultant's recommendation?

A. Entity Relationship Diagram (ERD)

B. System requirements specification

C. Change request logs

ANSWER: A

Explanation:

Entity Relationship Diagram (ERD) is correct because an ERD documents the structure of a data model: its entities or objects, the fields that describe them, and the relationships between them. A recommendation to use a more normalized model concerns how container information should be separated into related records rather than repeated across Product records. For example, an ERD could show a distinct Container Product Line object related to individual Container records, making it possible to store a shared color value at the appropriate level and reduce duplicate data. Reviewing the ERD lets the business analyst understand the proposed object boundaries, relationship cardinality, and where shared versus container-specific attributes belong. This is the information needed to assess the recommendation's intended impact on data integrity, reporting, automation, and migration. Salesforce's data-modeling guidance describes using object relationships to connect records and represent business processes, while Salesforce Schema Builder provides a visual view of objects and their relationships. These resources align directly with the purpose and content of an ERD: Salesforce Trailhead: Data Modeling and Salesforce Help: Schema Builder.

QUESTION NO: 2

Cloud Kicks Is conducting sprint planning for an Experience Cloud user portal project. The focus for this sprint Is on the minimum viable product.

Which requirement should the business analyst prioritize?

A. Items that are user-friendly features

B. Items requested by the majority of users

C. Items that are crucial to the business

ANSWER: C

Explanation:

Items that are crucial to the business should be prioritized because a minimum viable product (MVP) delivers the smallest usable solution that can achieve the initiative's core business objective and generate meaningful feedback. During sprint planning, the business analyst helps the team connect requirements to measurable outcomes, stakeholder goals, and the value the portal must provide at launch. For an Experience Cloud portal, this means identifying the essential capability that enables the intended users to complete the primary business process, rather than attempting to include every desirable enhancement in the first release. Prioritizing business-critical work also gives the product team an early opportunity to validate assumptions with real users, assess whether the solution is producing the expected value, and use the resulting feedback to guide subsequent backlog refinement and sprint planning. This approach supports iterative delivery: establish the foundational value first, then evaluate and prioritize additional usability improvements and broader requests based on evidence and business impact. Salesforce's Business Analyst certification preparation materials emphasize eliciting, analyzing, prioritizing, and validating requirements in alignment with business needs. See Salesforce Business Analyst Certification Prep and Learn About the Salesforce Business Analyst Certification.

QUESTION NO: 3

Universal Containers is setting up a Salesforce email integration for the sales team. Through discovery conversations, the business analyst (BA) learns the operations team also needs email integration in the near future.

What should the BA do next?

A. Proceed with the sales team's project as planned.

B. Start project work for the operations team.

C. Include the operations team during discovery.

ANSWER: C

Explanation:

Include the operations team during discovery. Discovery is intended to identify the complete set of relevant stakeholders, understand their goals and processes, and gather requirements before the solution scope and approach are finalized. Learning that operations will need the same email integration soon indicates that this team is a stakeholder whose needs, workflows, timing, data access, and potential dependencies could materially affect the design. Bringing operations into discovery lets the business analyst determine whether a shared solution can meet both teams' needs, document any distinct requirements, and give sponsors the information needed to make an informed scope and prioritization decision. This is not necessarily a commitment to deliver the operations capability in the current release; rather, it ensures that the team evaluates the broader business context early enough to avoid avoidable rework, duplicate designs, or an integration that cannot scale to the anticipated use case. Salesforce's business-analysis guidance emphasizes identifying stakeholders and eliciting requirements collaboratively, while its project guidance supports using discovery to align people, process, and technology around business outcomes. See Salesforce Trailhead: Business Analysis Fundamentals and Salesforce Trailhead: Requirements Elicitation.

QUESTION NO: 4

Which of the following User Management terms is best described by this definition: " Record created to identify a new employee that starts accessing Salesforce"

A. Profiles

B. Salesforce characters

C. Users

D. Roles

ANSWER: C

Explanation:

Users is correct because a Salesforce user record represents an individual person who can log in to an organization. When a new employee needs access to Salesforce, an administrator creates a user record and associates it with identifying information such as the employee's name, username, email address, and license. The user record is also where access-related assignments are made, including a profile and, when applicable, a role, permission sets, and other settings needed for the employee's work. Salesforce uses the user record to authenticate the person and to determine their access to Salesforce features, data, and records. A user must have an active user record and an appropriate user license to access the org. This makes "Users" the term that directly describes the record created for an employee beginning to access Salesforce. Salesforce's documentation explains that users are individual people who log in to Salesforce and that administrators manage their access through user records. See Salesforce Help: Users, Profiles, and Permission Sets and Trailhead: User Management Basics.

QUESTION NO: 5

Universal Containers (UC) has several teams working on a new application in Salesforce. Unfortunately, during the release process, it was discovered that the teams had overwritten each others changes.

What should JC use to prevent this from happening in the future?

A. Code review sessions

B. Version control system

C. Change set deployments

ANSWER: B

Explanation:

Version control system is correct because it provides a shared, traceable source of truth for application changes created by multiple teams. A version control system, such as Git, records each change as a commit, maintains historical versions, and supports branches so that teams can work independently without directly overwriting one another's work. Before changes are combined, teams can compare differences and resolve merge conflicts deliberately. This establishes an auditable release process and makes it possible to identify who changed a component, when it changed, and to restore an earlier version if necessary.

For Salesforce delivery, Salesforce recommends source-driven development practices in which metadata and code are tracked in a version control repository. Teams can use branches and pull requests to coordinate work, review proposed changes, validate them through automated processes, and merge approved work into the release branch. These practices are particularly important when multiple teams contribute to the same Salesforce application and deploy changes across environments. See Salesforce's guidance on source control and its Salesforce development models.

QUESTION NO: 6

Universal Containers (UC) has low adoption rate of its Salesforce solution. UC has hired a new vendor to overhaul its documentation and train)ng process. needs a business analyst to facilitate this transition.

Which of set if actions are the most effective business needs from stakeholders?

A. send surveys to collect feedback; observe end 'Users; whiteboard incoming requests; and store communication In a centralized location.

B. Mock up a design; build a prototype; demonstrate functionality to end users; and collect feedback for Changes.

C. Use multiple forms of communication; build trust; show empathy; and get commitment for next

ANSWER: A

Explanation:

“send surveys to collect feedback; observe end 'Users; whiteboard incoming requests; and store communication In a centralized location.” is the most effective set of actions because it combines several complementary elicitation and collaboration techniques. Surveys efficiently collect input from a broad user population, while observing end users reveals how they actually use Salesforce and where documentation or training gaps affect adoption. Whiteboarding incoming requests helps the business analyst facilitate shared understanding, identify themes, and turn unstructured feedback into clearly articulated needs. Maintaining communications in one centralized location creates a transparent, traceable source for stakeholder input, decisions, and follow-up actions during the vendor transition. Together, these practices enable the business analyst to gather both qualitative and quantitative feedback, validate needs with affected users, and ensure that the new documentation and training approach addresses real adoption barriers. Salesforce's business-analysis learning content emphasizes eliciting, documenting, and managing requirements collaboratively with stakeholders throughout the change process. See Salesforce Trailhead: Business Analysis Overview and Salesforce Trailhead: Business Analysis Stakeholder Management.

QUESTION NO: 7

The business analyst at Cloud Kicks is beginning to write user stories for its Salesforce implementation.

Which three components should-be included when writing a user story?

A. Who, what, why

B. When, where, why

C. Who, when, why

ANSWER: A

Explanation:

Who, what, why is correct because a user story concisely describes a requirement from the perspective of the person receiving value. The “who” identifies the user role or persona, such as a sales representative or support agent. The “what” states the capability or outcome that user needs. The “why” communicates the business value or benefit that makes the request worthwhile. A common format is: “As a [who], I want [what], so that [why].” For example, “As a sales representative, I want to view a customer’s recent cases on the account record, so that I can prepare for customer conversations.” This structure keeps the implementation focused on user needs and intended value rather than prematurely specifying a technical solution. The business analyst can then work with stakeholders and the delivery team to refine the story, define acceptance criteria, and determine the appropriate Salesforce configuration or development approach. Salesforce Trailhead describes user stories as a way to capture user needs and highlights the role, goal, and reason/value format. See Salesforce Trailhead: User Stories and Atlassian: User Stories.

QUESTION NO: 8

The business analyst (BA) At universal Containers is writing user stories for its Salesforce Field Service implementation.

What should the BA evaluate to understand the understand the risk level of the user stories?

A. Scope, resource, and documentation impact

B. Team, budget, and timeline impact

C. Technical, operational, and regulatory impact

ANSWER: A

Explanation:

Scope, resource, and documentation impact is the appropriate evaluation because a user story’s risk is determined by the potential effect that delivering, changing, or deferring it can have on the implementation. Scope impact identifies whether the story introduces dependencies, complexity, or changes to agreed requirements. Resource impact establishes the skills, capacity, effort, and cross-functional coordination needed to deliver the story successfully. Documentation impact identifies required updates to process materials, training, acceptance criteria, support guidance, or other artifacts needed to make the solution usable and maintainable. Considering these impacts gives the BA a practical, delivery-focused basis for identifying stories that need earlier clarification, additional stakeholder review, mitigation planning, or prioritization attention. Salesforce’s business-analysis guidance emphasizes analyzing requirements, managing their impacts, and maintaining clear documentation throughout the delivery lifecycle. User stories should also be refined with sufficiently clear acceptance criteria so that implementation implications can be understood before development proceeds. See the Salesforce Business Analysis Foundations module and the Salesforce user stories guidance.

QUESTION NO: 9

The operations team at Universal Containers is developing a new inventory forecasting application available on its Experience Cloud site. Management wants to identify key external stakeholders to assist with determining project priorities.

Which external stakeholders should the business analyst recommend?

A. Governing bodies

B. Third-party vendors

C. Buyers and customers

ANSWER: C

Explanation:

Buyers and customers are the appropriate external stakeholders because the application is intended to be available through an Experience Cloud site, which is commonly used to provide external audiences with secure, tailored access to business information and processes. These users are directly affected by how inventory availability and forecasting information is presented, how easily they can find it, and which capabilities would provide the most value in their purchasing or planning activities. Their input helps the business analyst prioritize requirements based on real user needs, such as visibility into expected availability, product demand, ordering decisions, and notifications. Engaging buyers and customers early also validates assumptions about the user journey and helps ensure that priorities reflect outcomes that improve the external user experience as well as business value. Salesforce business analysis guidance emphasizes identifying stakeholders who are affected by the change and who can provide relevant input into requirements and priorities. Experience Cloud is specifically designed to connect organizations with external users, including customers, through branded digital experiences. See Salesforce's stakeholder identification guidance and its Experience Cloud overview.

QUESTION NO: 10

Cloud Kicks (CK) is reviewing requirements for a Service Cloud implementation. The project team has identified more requested capabilities than can be included in the initial release.

Which technique should the business analyst use to classify requirements as must have, should have, could have, or will not have for now?

A. SWOT analysis

B. MoSCoW prioritization

C. Root cause analysis

ANSWER: B

Explanation:

MoSCoW prioritization is correct because it provides a structured way to classify requirements by their relative importance. Must-have requirements are essential for the release to meet its objectives, while should-have and could-have requirements provide value but can be deferred if needed. Will-not-have-for-now requirements are explicitly outside the current release scope. This technique helps stakeholders make transparent trade-off decisions when time, budget, or team capacity is limited. See Salesforce Trailhead: Business Analysis Fundamentals.

QUESTION NO: 11

Universal Containers has asked a business analyst (BA) to assist the sales management team with a request for a new picklist field called "Lost Reason" on the Opportunity object with the goal of improving pipeline reports. After mapping the managers to the sales leader persona and obtaining feedback from them, the BA has discovered that the managers want to better understand Closed/Lost Opportunities so they can help sales teams close more deals.

Which option should the BA use to construct the user story?

A. As a sales leader, I want to see more details on Closed/Lost Opportunities so I can help the sales team improve close rates.

B. As a sales team member, I need additional enablement training and reporting information to help the improve close rates.

C. AS a sales leader, I need a new "Closed/Lost Reason" picklist field on Opportunities and better reports to help the sales team improve close rates.

ANSWER: A

Explanation:

“As a sales leader, I want to see more details on Closed/Lost Opportunities so I can help the sales team improve close rates.” is the strongest user story because it expresses the identified persona, the user’s underlying need, and the intended business outcome. The sales leader is the persona established through stakeholder and persona mapping. The desire to see more details about Closed/Lost Opportunities reflects the feedback that leaders need to understand lost deals better. Improving the sales team’s close rate clearly states the value that the requested capability should deliver.

A well-formed user story focuses on who needs something, what they need to accomplish, and why it matters. It should not prematurely lock the team into a particular configuration or technical solution. The proposed picklist and reporting changes can be evaluated later as potential solutions and documented through acceptance criteria, process requirements, or implementation tasks. This approach lets the delivery team validate that the eventual solution provides the insight sales leaders need while retaining flexibility in how Salesforce is configured. Salesforce’s business-analysis guidance emphasizes eliciting stakeholder needs and translating them into clear, value-focused requirements. See Salesforce Trailhead: Business Analysis Fundamentals and Salesforce Trailhead: Scrum Basics.

QUESTION NO: 12

The project team at Universal Containers has started to review the existing Salesforce manufacturing solution that has low adoption and a variety of customization including custom objects, custom fields, renamed standard fields.

What should the business analyst recommend to the project team to increase understanding when documenting requirements, process and potential solutions?

A. Use customer terminology and language.

B. Use industry terminology and language.

C. Use Salesforce terminology and language.

ANSWER: A

Explanation:

Use customer terminology and language. In an organization with significant existing customization, including renamed standard fields and custom data structures, the language used in Salesforce may not match the vocabulary that manufacturing users use to describe their work. A business analyst should document requirements, current and future processes, and potential solutions in terms stakeholders recognize, such as their product, account, production, quality, or fulfillment terminology. This creates a shared understanding between business users and the delivery team, makes process discussions easier to validate, and helps ensure that stated requirements represent the actual business need rather than assumptions based on standard Salesforce labels.

Customer language is especially important while assessing a low-adoption implementation. It allows the team to identify how users conceptualize their work, capture the meaning behind existing customizations, and translate those needs into an appropriate Salesforce design. The analyst can later map this agreed business vocabulary to Salesforce objects, fields, and features as part of solution design. Salesforce’s business-analysis guidance emphasizes eliciting and documenting stakeholder needs and validating shared understanding throughout delivery. See Salesforce Trailhead: Requirements and Salesforce Trailhead: Stakeholder Management.

QUESTION NO: 13

A business analyst (BA) discovers that universal Containers automated case assignments in Service Cloud. UC uses case assignment rules to route cases to predefined team. The UC leadership team wants to improve how cases are routed.

What should the BA recommend to help the resolve a common obstacle?

A. Minimize case escalations to reduce time to resolution.

B. Migrate from case assignment riles to Omni-Channel.

C. Document the current case assignment process.

ANSWER: C

Explanation:

Document the current case assignment process. is the appropriate recommendation because a reliable current-state view is essential before stakeholders can identify and resolve routing obstacles. The BA should capture the case criteria that trigger each assignment rule, rule order, assigned queues or teams, ownership changes, exceptions, manual workarounds, escalation paths, and the business outcomes expected from each route. This documentation makes the routing logic visible to leadership, service agents, and administrators, creating a shared factual baseline for validating where cases are delayed, misrouted, or handled inconsistently. It also helps distinguish a configuration issue from a process or policy issue. With the current process agreed upon, the team can define measurable future-state requirements—such as improved routing criteria, queue design, capacity-based work distribution, or escalation handling—and evaluate changes without unintentionally disrupting existing service operations. Salesforce case assignment rules are ordered criteria that automatically assign cases to users or queues, so documenting how those criteria operate in practice is particularly important when improving routing. See Salesforce's case assignment rules documentation and the Salesforce Business Analyst credential overview.

QUESTION NO: 14

A business analyst (BA) at Northern Trail Outfitters is assigned to a project to help revamp the case management process. The BA has gathered requirements and finished the first draft of user stories.

What should the BA use to assess the quality of a user story?

A. INVEST checklist

B. Numerical framework

C. Gap analysis document

ANSWER: A

Explanation:

The **INVEST checklist** is a practical, widely used method for assessing whether a user story is well formed and ready to be considered for implementation. It evaluates a story against six qualities: it should be **Independent**, **Negotiable**, **Valuable**, **Estimable**, **Small**, and **Testable**. Applying these criteria helps a business analyst identify stories that are overly dependent on other work, written as fixed solutions rather than discussion starters, unclear in their business value, too large to plan effectively, or missing measurable acceptance conditions.

For a case-management revamp, the BA can review each drafted story with the delivery team and stakeholders, refine its scope and value, and add or clarify acceptance criteria until the story can be understood, estimated, prioritized, and verified. This supports iterative delivery because the team has a consistent quality standard for maintaining a healthy backlog. Salesforce's Business Analyst guidance emphasizes creating clear, testable user stories and acceptance criteria to communicate requirements effectively. See Salesforce Trailhead's Create User Stories unit and the Agile Alliance's INVEST definition.

QUESTION NO: 15

The delivery team at Cloud Kicks has Just conducted a successful sprint demo showcasing a new sales dashboard. However, the marketing team Is unhappy because the new lead automation they requested was missing from the deliverables and an Important new marketing campaign is starting the next day.

What did the business analyst fall to do during sprint planning ' ?

A. Prioritize the sprint backlog with stakeholders

B. Calculate the sprint capacity correctly

C. Create a burndown list of sprint tasks

ANSWER: A

Explanation:

Prioritize the sprint backlog with stakeholders is correct because sprint planning requires the team to select work that delivers the highest value and supports the Sprint Goal. A business analyst helps make sure stakeholder needs, business deadlines, dependencies, and expected outcomes are understood before the sprint scope is agreed. Here, the imminent marketing campaign makes lead automation a time-sensitive, high-value need. The analyst should have worked with the marketing team and product owner to ensure that this requirement was visible, refined enough for consideration, and appropriately prioritized against the sales dashboard work. That collaboration also confirms whether the requested automation can be completed within the sprint and sets clear expectations about what will be delivered. Effective backlog prioritization is not merely ranking items; it is an ongoing stakeholder conversation that aligns delivery decisions with business value and urgency. The Scrum Guide states that the Product Backlog is an ordered list of needed work and that sprint planning determines why the sprint is valuable and what can be done during it. Salesforce's agile project-management learning material likewise emphasizes using agile practices to prioritize and deliver value iteratively. See the Scrum Guide and Salesforce Trailhead: Learn About Agile Project Management.

QUESTION NO: 16

A business analyst (BA) is working with the support team at Cloud Kicks (CK) on a Service Cloud implementation. The BA has decided to create a process map to understand CK's current merchandise return process.

What are the top three benefits of creating a process map?

A. Engages stakeholders, identifies improvements, and starts the change process

B. Builds accountability, increases revenue, and decreases overall time spent on requirements

C. Identifies improvements, decreases project costs, and starts the change process

ANSWER: A

Explanation:

Engages stakeholders, identifies improvements, and starts the change process is correct because a process map makes the current merchandise-return workflow visible and understandable to the people who perform, manage, or are affected by it. Mapping the process gives support-team stakeholders a common visual language for validating the actual sequence of work, handoffs, decisions, systems, inputs, and outcomes. This active validation creates engagement and shared ownership of the process definition.

Once the current state is visualized, the BA and stakeholders can spot opportunities to improve the experience and operations, such as unnecessary handoffs, repeated data entry, delays, unclear decision points, and inconsistent exception handling. Those insights provide evidence for defining a future-state process that Service Cloud can support. The mapping activity also begins the change process: it helps stakeholders understand what exists today, discuss the desired future workflow, and develop alignment around the changes needed to move from the current state to that future state. Salesforce describes process mapping as a technique for documenting and analyzing processes, including identifying areas for improvement. See Salesforce Trailhead: Process Mapping and Salesforce Business Analyst Certification Prep.

QUESTION NO: 17

A business analyst is working with a new customer on a Sales Cloud implementation. The executive sponsor for the project is new to the company and their role as VP. The sponsor has inherited functional requirements from the previous VP that were gathered 9 months ago. The project start date has yet to be defined. The sponsor wants to use the inherited requirements in lieu of a traditional discovery process.

What is the largest risk with this approach?

A. The previous VP's requirements fail to meet current formatting standards.

B. The previous VP's requirements may differ from those of the new executive.

C. The previous VP's requirements are outside of the Salesforce framework.

ANSWER: B

Explanation:

The previous VP's requirements may differ from those of the new executive. Requirements represent stakeholder needs, business objectives, priorities, assumptions, and desired outcomes at a particular point in time. In this case, the requirements are already nine months old, the project has no defined start date, and the executive sponsor has changed. The new VP may have a different strategic direction, different measures of success, or different priorities for the sales organization. Business conditions, processes, users, and organizational goals may also have changed since the original requirements were collected.

Discovery is therefore essential for validating that inherited requirements remain current, complete, feasible, and aligned to the accountable sponsor's vision. A business analyst should engage the new sponsor and relevant stakeholders to confirm objectives, identify affected groups, clarify priorities, and establish measurable success criteria before using the requirements as a basis for solution design. This validation reduces the risk of delivering a Sales Cloud implementation that satisfies historical requests but does not support current business value or executive expectations. Salesforce describes discovery as an important activity for understanding business needs and defining the intended outcomes of a solution. See Salesforce Trailhead: Business Analysis Fundamentals and Salesforce Trailhead: Learn About Discovery.

QUESTION NO: 18

The Cloud Kicks admin is getting ready to release a record-triggered flow that auto-generates Renewal Opportunity Order Line Items once an Opportunity is Closed/Won for a sales team user story.

During user acceptance testing, what should the business analyst do to ensure the solution fulfills the needs of the sales team?

A. Draft a list of test cases and scripts and choose "Run flow as another user" to debug the flow as a sales team user to identify and fix bugs.

B. Choose subject matter experts as testers and prepare a sandbox with quality test data, test cases, and scripts that match real-world scenarios.

C. Collaborate with the admin and a power user to test the flow for scalability, robustness, and maintainability in a sandbox.

ANSWER: B

Explanation:

Choosing subject matter experts as testers and preparing a sandbox with quality test data, test cases, and scripts that match real-world scenarios is the appropriate user acceptance testing approach. UAT validates that a completed solution supports the business process and acceptance criteria in the way intended by the people who will use it. Sales-team subject matter experts can confirm that closing a won Opportunity produces the expected Renewal Opportunity Order Line Items, including the correct products, quantities, timing, and handling of realistic sales-process variations.

A sandbox provides a safe environment in which to run these business-focused tests without affecting production records or users. The business analyst should ensure that test data represents relevant conditions encountered by the sales team, such as opportunities with different product combinations and renewal requirements. Clearly documented test cases and scripts make testing repeatable, allow testers to record expected and actual results, and provide useful evidence for acceptance and release decisions. Salesforce describes testing as a process of validating that a solution meets defined requirements, while UAT specifically relies on business users to validate fit for purpose. See Salesforce Trailhead: Testing as a Business Analyst and Salesforce Help: Test Flows.

QUESTION NO: 19

Northern Tail Outfitters has fixed a business analyst (BA to help revamp the order management process. During the backlog regiment session, the BA discovers the few user satires are no longer needed.

What should the BA do next?

A. Cancel these user stories and remove them from the backlog.

B. Move these user stories to the bottom of the backlog.

C. Review these user stories in the backlog at the next sprint retrospective.

ANSWER: A

Explanation:

Cancel these user stories and remove them from the backlog is the appropriate next step because backlog refinement is the activity in which the team and product owner keep the backlog current, understandable, and aligned to the product's present needs. When a story is no longer needed, it no longer represents work that delivers value toward the desired business outcome. Removing it prevents unnecessary estimation, prioritization, discussion, and future sprint-planning effort. The BA should ensure that the relevant product owner and stakeholders have validated that the need has been retired, then update the backlog so it remains an accurate source of planned work. This is also consistent with the BA's role in helping maintain clear, valuable, and actionable requirements. A backlog is not a permanent record of every idea or previously identified requirement; it is an ordered, evolving representation of work that is currently needed to improve the product. Salesforce's business-analysis learning content emphasizes managing requirements and user stories to support stakeholder value, while the Scrum Guide describes the Product Backlog as emergent and continuously refined. See Salesforce Trailhead: Business Analysis Projects and The Scrum Guide.

QUESTION NO: 20

Universal Container wants to implement a solution to help it track and analyze its carbon emission in an effort to meet its new initiatives. The CEO has reached out to the product development team for assistance. The business analyst (BA) has begun exploring potential solutions based on the requirements.

What should the BA do first?

A. Investigate building a custom app.

B. Use CRM Anal Analyst actionable insights.

C. Review relevant apps on the AppExchange

ANSWER: C

Explanation:

Review relevant apps on the AppExchange is the appropriate first step because the business analyst has already begun evaluating solutions against the stated requirements. AppExchange is Salesforce's marketplace for packaged applications, components, and consulting offerings. Reviewing available offerings allows the BA to determine whether an existing, purpose-built solution can address carbon-emissions tracking and analysis with less implementation time, cost, and delivery risk than creating functionality from scratch.

This review should focus on how well each potential solution supports the organization's required emissions data, calculations, reporting, dashboards, security model, integrations, scalability, and administrative effort. The BA can also assess provider documentation, supported editions, customer reviews, trial options, and any dependencies before presenting feasible alternatives to stakeholders. This is consistent with a solution-oriented analysis approach: identify whether standard Salesforce capabilities or an established marketplace product meets the need before recommending custom development. A packaged solution may be configurable to fit the organization's processes while retaining vendor-maintained functionality and updates. Salesforce describes AppExchange as a trusted marketplace for extending Salesforce with apps and other solutions: Salesforce AppExchange. Salesforce's business analyst learning content also emphasizes evaluating solution options in collaboration with stakeholders: Salesforce Business Analyst Quick Look.

QUESTION NO: 21

A business analyst has been tasked with leading prototype efforts for a Salesforce project.

What is a prototype?

A. A model of a final proposed product

B. A first pass, simple sketch of an idea

C. A polished, proven solution

ANSWER: A

Explanation:

A prototype is a model of a final proposed product. In a Salesforce project, it gives stakeholders a tangible representation of the intended future solution before the team commits to full configuration, development, and deployment. A business analyst can use a prototype to demonstrate anticipated user interactions, screen flows, data capture, navigation, and key business processes, then collect feedback and refine requirements. The prototype does not need to be production-ready; its purpose is to help people validate that the proposed solution meets the business need and to establish shared understanding among stakeholders and the delivery team. Salesforce describes prototyping as a technique for making future-state ideas visible and testable, which helps teams uncover assumptions and improve the solution through early feedback. See Salesforce Trailhead's guidance on defining the future state and the Salesforce UX overview of the UX design process.

QUESTION NO: 22

The business analyst (BA) at Cloud Kicks has been asked to map the current sales process in Sales Cloud to document legal compliance with local privacy regulations, which can differ based on the state or country of a data transaction.

Which activity would be most effective in helping the BA understand the sales process?

A. Using live workshops to map out the sales process

B. Asking stakeholders to complete a questionnaire

C. Conducting individual interviews with stakeholders

ANSWER: A

Explanation:

Using live workshops to map out the sales process is the most effective activity because the BA needs a shared, accurate view of the current-state process across the people and teams who perform or govern it. A facilitated workshop enables sales representatives, sales operations, legal or privacy specialists, and other stakeholders to map each process step together, identify what customer or transaction data is collected and used, and record where state- or country-specific privacy requirements affect decisions, approvals, or handoffs. Participants can resolve differing interpretations in real time and expose exceptions that may not appear in a standard process description. This collaborative format also helps the group agree on process boundaries, owners, systems involved, inputs and outputs, and compliance controls, producing a validated process map that can support later requirements work. Salesforce's business-analysis guidance emphasizes eliciting requirements with stakeholders and using collaborative techniques appropriate to the work, while Salesforce Flow process documentation likewise supports understanding the business process before implementing automation. See Salesforce Trailhead: Business Analysis Projects and Salesforce Trailhead: Business Process Automation.

QUESTION NO: 23

Northern Trail Outfitters (NTO) is working with an implementation partner to transform its customer support team with Service Cloud. A new business analyst (BA) who is a replacement from the partner was introduced to NTO stakeholders during the discovery phase of the project. The new BA is still getting to know each of the stakeholders when they start the requirements workshop. The BA asks a stakeholder a discovery question and they seem irritated.

What should the BA do to build trust with the stakeholder as the project continues?

A. Set up a casual meeting to create a personal connection with the stakeholder.

B. Reset project expectations at the next meeting with the stakeholder.

C. Ask an executive sponsor to address the stakeholder's concerns.

ANSWER: A

Explanation:

Set up a casual meeting to create a personal connection with the stakeholder. is the best action because the BA is new to the engagement and needs to establish rapport before expecting consistently productive requirements conversations. An informal, one-to-one discussion gives the BA an opportunity to learn the stakeholder's responsibilities, priorities, communication preferences, prior project experiences, and concerns without putting them on the spot in a workshop. It also demonstrates empathy and a genuine interest in the stakeholder's perspective. This relationship foundation helps the BA tailor future discovery questions, clarify the purpose of requirements activities, and create a more psychologically safe environment for honest collaboration. Trust is especially important in discovery, where stakeholders must share operational pain points, assumptions, and desired outcomes that can shape the solution. Salesforce's business analysis guidance emphasizes engaging stakeholders and building collaborative relationships to understand needs and deliver value. A casual connection-building meeting is a practical early step toward that partnership. See Salesforce Trailhead's Business Analysis Fundamentals and Business Analysis Stakeholder Management.

QUESTION NO: 24

The project team is building a Sales Cloud implementation. The business analyst (BA) wants to make sure the solution meets the needs of the business. The BA needs to identify where user testing should occur and who should participate.

Which approach should the BA follow?

A. Create a scratch org and give the development team access to it.

B. Create a partial sandbox and give the VP of sales access to it.

C. Create a full copy sandbox and give power users access to it

ANSWER: C

Explanation:

Create a full copy sandbox and give power users access to it is the appropriate approach because user acceptance testing should validate the implemented Sales Cloud solution in an environment that closely represents production. A Full sandbox contains a copy of the organization's production configuration and data, making it suitable for comprehensive testing of business processes, data-driven behavior, integrations, and user workflows before release. Salesforce identifies Full sandboxes as appropriate for performance testing, load testing, and staging, and their production-like data set also supports realistic acceptance testing.

Power users are well suited to participate because they have detailed knowledge of the organization's day-to-day sales processes, common exceptions, reporting needs, and practical usability requirements. They can execute representative test scenarios, confirm that configured functionality supports the documented requirements, identify gaps, and provide informed business feedback. The BA should work with these users to define acceptance criteria and test cases, coordinate testing, document outcomes, and ensure that feedback is addressed before deployment. This combines a production-representative test environment with knowledgeable business representatives, which is essential for confirming that the solution meets business needs.

See Salesforce's Sandbox Types and Templates documentation and its Create a Sandbox Trailhead module.

QUESTION NO: 25

As part of the digital transformation at Cloud Kicks, company leaders have decided to adopt Service Cloud as its CRM platform for customer service and support. Executive directors are supportive of the initiative, but end users are unconvinced and prefer to remain on the current platform.

What should the business analyst do to gain the end users' cooperation?

A. Respond to end users with empathy and accommodate their needs; translate the end users' needs into technical requirements; and deliver the project to the developers to implement the solution.

B. Use an assertive influencing style; demonstrate authority and expertise; outline the project objectives; and make sure end users know that the decision has been made and the time to make changes has passed.

C. Identify key stakeholders and develop relationships with them as a trusted advisor; involve stakeholders and end users in the design of the new solution; and act as a liaison between business and technical teams.

ANSWER: C

Explanation:

Identify key stakeholders and develop relationships with them as a trusted advisor; involve stakeholders and end users in the design of the new solution; and act as a liaison between business and technical teams. This approach directly supports adoption by treating end users as active contributors rather than passive recipients of a leadership decision. A business analyst should build trust with the people affected by the change, understand their current workflows and concerns, and ensure those insights shape the future-state Service Cloud design. Involving users in discovery, requirements validation, prototyping, and feedback sessions creates ownership and makes the solution more likely to address practical service and support needs.

Serving as the connection between business stakeholders and technical delivery teams is also essential. The business analyst translates user goals, pain points, and desired outcomes into clear, testable requirements while helping users understand how proposed capabilities support the transformation. This collaboration enables informed change management, surfaces risks early, and establishes a network of stakeholders who can advocate for the new platform. Salesforce's business-analysis learning materials emphasize stakeholder engagement, discovery, and collaborative solution design throughout the project lifecycle. See Business Analysis Project Cycle and Understand the Discovery Phase.

QUESTION NO: 26

A business analyst (BA) Is coordinating a User Acceptance Testing (UAT) session focused on Service Cloud enhancements.

Which resource Is critical for the BA to include in UAT?

A. Support agents

B. System developers

C. Quality assurance testers

ANSWER: A

Explanation:

Support agents are critical for the BA to include in UAT because they are the people who will use the Service Cloud enhancements to handle customer cases and complete day-to-day service work. UAT confirms that a solution supports the intended business processes and satisfies the acceptance criteria from the perspective of real business users. Support agents can execute realistic scenarios, such as creating, routing, updating, and resolving cases, and assess whether the new functionality is understandable and usable in the context of their operational responsibilities. Their feedback helps the project team identify whether the enhancement meets the documented requirements before deployment and whether user-facing processes, guidance, and readiness activities need refinement. Salesforce Trailhead describes UAT as testing conducted by end users to verify that a solution works for their business needs, making representative users essential participants. For Service Cloud changes, support agents provide that representative end-user perspective and can formally validate readiness for release. See Salesforce Trailhead: Learn About User Acceptance Testing and Salesforce: User Acceptance Testing.

QUESTION NO: 27

In what phase of the four application lifecycle milestones does this action belong? Communicate Changes, Update Profiles and Communicate end of Changes.

A. Build

B. Deploy

C. Test

D. Plan

ANSWER: B

Explanation:

Deploy is the appropriate application lifecycle milestone for communicating changes, updating profiles, and communicating completion of the changes. Deployment is the controlled transition of validated work into the production environment, where it becomes available to the people and business processes that need it. Updating profiles at this point helps ensure that users have the intended object, field, app, tab, and feature access when the released functionality is made available. Communication before and after the release is also a key deployment activity: stakeholders need to know what is changing, when it will be available, any expected impact or downtime, and when the release has been completed successfully. These activities support adoption, reduce operational disruption, and provide a clear handoff from the delivery team to business users and support teams. Salesforce's application lifecycle guidance emphasizes using a structured process to develop, test, and release changes, while Salesforce profile administration governs the user access needed once functionality is live. See the Salesforce application lifecycle documentation and Salesforce profile administration guidance.

QUESTION NO: 28

A project is in the user acceptance testing phase of a Sales Cloud implementation at Universal Containers. The business analyst (BA) is coordinating the test case execution and supporting the testers. One of the testers fails a test case because they were unable to see a custom field identified in the directions. The BA has reviewed the details of the failed test case and compared the expected outcome to the requirements.

What should the BA do next?

A. Assign the test case to another tester.

B. Assign a bug to the development team.

C. Attempt to reproduce the issue.

ANSWER: C

Explanation:

Attempt to reproduce the issue. is the appropriate next step because the BA has confirmed that the test's expected outcome aligns with the documented requirement, but must now validate the observed failure before classifying and routing it as a defect. Reproducing the result using the same test data, user context, record type, app, and navigation steps helps establish whether the field is genuinely unavailable and whether the problem is caused by configuration, such as field-level security or page-layout assignment. It also produces clear, actionable evidence for the project team if remediation is needed. In user acceptance testing, a failed test case should be investigated sufficiently to confirm the behavior and capture reproducible steps, expected versus actual results, and relevant context. This supports reliable defect management and avoids sending an unverified issue to development. Salesforce access to fields depends on configured visibility and user permissions, so confirming the tester's context is particularly important for a missing custom field. See Salesforce's guidance on field-level security and Trailhead's overview of Salesforce security and user access.

QUESTION NO: 29

New interns at Universal Containers have been tasked with following a new process to import leads from a spreadsheet into Salesforce. A business analyst is mapping the process to document the overall lead creation process.

What should the process map look like?

A. A very detailed process map that is unambiguous and version controlled

B. A somewhat detailed process map that is easy to remember and self- explanatory

C. A simple process map that is high-level and covers key aspects

ANSWER: A

Explanation:

A very detailed process map that is unambiguous and version controlled is appropriate because the map will guide new interns through an operational process that can directly affect lead quality, ownership, duplicate records, and reporting. A detailed map can clearly identify the required sequence of actions, decision points, inputs and outputs, responsible roles, validations, exception handling, and the expected result of each import. Unambiguous instructions reduce the need for interns to rely on assumptions or tribal knowledge, which is especially important when people are new to both the process and Salesforce.

Version control is also essential for a repeatable business process. It lets Universal Containers identify the current approved procedure, communicate changes such as revised field mappings or duplicate-management rules, and retain a record of prior process versions. This helps the organization train users consistently and maintain process governance as lead-import requirements evolve. Salesforce's import guidance highlights the importance of preparing and mapping data carefully before import, while Business Analyst practices emphasize documenting processes at a level appropriate for the users who must execute them. See Salesforce Data Import Wizard documentation and Salesforce Trailhead: Process Mapping.

QUESTION NO: 30

Northern Trail Outfitters is starting a project to implement Service Cloud for the customer service department.

Which activity should be handled by a business analyst assigned to this project?

A. Work with Salesforce to purchase the necessary licenses.

B. Manage existing Salesforce applications and activities.

C. Understand current business processes and document existing functionality.

ANSWER: C

Explanation:

Understand current business processes and document existing functionality. is the appropriate activity for a business analyst during a Service Cloud implementation. A business analyst works with stakeholders in the customer service department to discover how work is currently performed, including case intake, assignment, escalations, knowledge use, service-level commitments, and reporting needs. Documenting the current state establishes a shared, evidence-based understanding of people, processes, and technology before the team designs a future-state Service Cloud solution.

This analysis helps identify business needs, pain points, process gaps, dependencies, and measurable outcomes. The business analyst can then translate stakeholder needs into clear requirements and support prioritization and solution design with the project team. Salesforce describes business analysis as working with stakeholders to define requirements and recommends understanding the current state before defining the future state and solution approach. These activities ensure that the implementation is grounded in the department's actual operational needs rather than assumptions about how customer service should work. See Salesforce Trailhead's Business Analysis Basics and Business Process Mapping for further guidance.

QUESTION NO: 31

The VP of sales at Cloud Kicks wants to streamline the lead qualification process to improve the team's productivity and help them reach their target goals. A business analyst (BA) has been assigned to the project to identify the disconnect between the sales and marketing teams' definitions of a qualified lead.

What should the BA focus on?

A. Mapping historical lead data from each team and building carts to highlight similarities

B. Evaluating the team's skills and experiences to determine how the can better align.

C. Scheduling an all-day collaboration workshop with both team to resolve their differences.

ANSWER: C

Explanation:

Scheduling an all-day collaboration workshop with both team to resolve their differences is the appropriate focus because the issue is fundamentally a shared-definition and stakeholder-alignment problem. Sales and marketing may each use valid but different criteria when deciding whether a lead is qualified. Before a streamlined process, automation, or measurement approach can be designed, the BA needs to facilitate a structured conversation that makes those criteria visible, establishes common terminology, and guides the groups toward an agreed future-state definition.

A collaborative workshop is especially useful when multiple stakeholder groups own different portions of a process. It gives participants a forum to document the current lead handoff, identify decision points and pain points, agree on qualification signals and required information, and define ownership for the resulting process. The BA can capture the agreed outcomes as requirements, acceptance criteria, and a shared definition of a marketing-qualified or sales-qualified lead. This creates stakeholder buy-in and a reliable basis for configuring Salesforce and measuring conversion performance consistently. Salesforce's business-analysis learning content emphasizes planning elicitation and collaborating with stakeholders to understand needs and define outcomes; see Business Analysis Projects on Trailhead and the Salesforce Certified Business Analyst Exam Guide.

QUESTION NO: 32

A business analyst (BA) at Cloud Kicks has been tasked with preparing for requirements gathering workshops for an upcoming Sales Cloud implementation.

Which documentation is mast beneficial for the BA to define the scope of the project?

A. Detailed Process Map

B. Value Stream Map

C. Suppliers, Inputs, Process, Outputs, Customers (SIPOC) Map

ANSWER: C

Explanation:

Suppliers, Inputs, Process, Outputs, Customers (SIPOC) Map is the most beneficial documentation for defining project scope before requirements workshops because it establishes a shared, high-level view of the business process and its boundaries. A BA can use SIPOC to identify who or what supplies the process inputs, the major process steps being considered, the resulting outputs, and the customers or stakeholders who receive those outputs. This allows the team to determine what process area the Sales Cloud implementation will address and, just as importantly, where the process starts and ends.

At the workshop-preparation stage, this concise view helps the BA align sponsors and stakeholders on the business context without prematurely documenting every workflow detail. It provides an effective foundation for planning workshop participants, identifying key questions, surfacing dependencies, and clarifying which teams, systems, and outcomes are in scope. Salesforce describes process mapping as an information-discovery technique for understanding and communicating current-state business processes; a SIPOC map is especially useful for framing that discovery at a high level. See Salesforce Trailhead's information discovery techniques and Business Analyst Skills and Strategies resources.

QUESTION NO: 33

Universal Containers (UC) has chosen to implement Sales Cloud and Service Cloud to increase revenue and remove bottlenecks in its current processes. A business analyst (BA) is tasked with diagramming business processes.

What should the BA do to successfully meet governance requirements to identify the business purpose?

A. Use UC's existing terminology.

B. Adhere to agreed upon mapping standards.

C. Identify resources engaged in each step.

ANSWER: B

Explanation:

Adhere to agreed upon mapping standards. Process-mapping governance ensures that diagrams are created in a consistent, understandable, and maintainable way across the organization. Agreed standards establish conventions for such elements as the process title and purpose, scope, start and end points, activity names, decision points, roles, handoffs, levels of detail, and diagram notation. Applying those conventions enables stakeholders to quickly recognize the business purpose of a process and interpret it consistently, even when the diagram is reviewed by teams that did not create it.

For UC’s Sales Cloud and Service Cloud initiative, a governed process map provides a reliable shared artifact for validating the current state, identifying bottlenecks, and defining the desired future state. It also supports traceability from business objectives through requirements and solution decisions. A BA should therefore confirm the organization’s approved process-mapping methodology and templates, use them consistently, and ensure the stated process purpose aligns with the initiative’s revenue and service objectives. Salesforce describes the BA role as connecting business needs to solution outcomes and emphasizes structured analysis practices in its Business Analysis Basics Trailhead module. Additional Salesforce BA learning resources are available through Salesforce Business Analyst Credential.

QUESTION NO: 34

Universal Containers (UC) has several teams working on a new application in Salesforce. Unfortunately, during the release process, it was discovered that the teams had overwritten each otherâ€™s changes.

What should JC use to prevent this from happening in the future?

A. Code review sessions

B. Version control system

C. Change set deployments

ANSWER: B

Explanation:

Version control system is correct because it provides a shared, reliable process for managing work performed by multiple teams on the same Salesforce application. A version control repository records changes over time and gives contributors a common source of truth for application metadata, code, and configuration represented as source files. Teams can work independently in branches, then submit their work for review and merge it in a controlled manner. This process identifies merge conflicts before release, allowing the team to reconcile incompatible edits deliberately rather than accidentally overwriting another team’s work during deployment.

For Salesforce delivery, source-driven development and version control support repeatable releases, traceability, collaboration, and recovery of prior versions when needed. Salesforce DX is designed around this model: metadata is retrieved into a local project, tracked in a version control system, and deployed through a defined development and release process. Establishing branch conventions, pull requests, and an agreed integration process alongside the repository will help UC coordinate parallel work and preserve every team’s changes. Salesforce describes the source-driven development workflow in Salesforce DX project development documentation, and provides practical Git workflow guidance in Trailhead’s GitHub workflow unit.

QUESTION NO: 35

Universal Containers has just been notified by authorities that govern the shipping industry of new regulatory requirements. To comply, they are several existing processes built on Salesforce that will need to change. A business analyst (BA) will help describe the additional business needs imports by the new regulations.

Which type of document should the BA prepare?

A. Audit log

B. Current state analysis

C. Gap analysis

ANSWER: C

Explanation:

Gap analysis is the appropriate document because Universal Containers must determine what is missing between its existing Salesforce-supported shipping processes and the newly mandated regulatory requirements. The BA can use a gap analysis to document the current process or capability, the required future-state capability imposed by the regulations, and the specific changes needed to close each gap. These changes may include new data fields, validation requirements, approval steps, reports, integrations, security controls, or user procedures. This produces a traceable set of business needs that stakeholders can review, prioritize, and translate into solution requirements while demonstrating that each regulatory obligation has been addressed. Salesforce describes business analysis as identifying business needs and defining solutions that deliver value; assessing the difference between the current situation and the required outcome is central to that work. A well-maintained gap analysis also supports impact assessment and helps the delivery team plan implementation and testing for compliance-related changes. See Salesforce Trailhead's Business Analysis Basics and the International Institute of Business Analysis overview of business analysis key concepts.

QUESTION NO: 36

A business analyst is gathering requirements for an automation that triggers tasks when an opportunity status changes. The requirement is that the system must alert the finance team when an opportunity is won.

What is an example of a well-written user story in this scenario?

A. As a finance team member, I need to know when an opportunity is won so that I can set up a billing account and update the account number.

B. As an opportunity is won, task must be created for the finance team to set up a billing account and update the account the account number.

C. As the system, it need to alert the finance team when an opportunity is won so they can set up a billing account and update the account number.

ANSWER: A

Explanation:

"As a finance team member, I need to know when an opportunity is won so that I can set up a billing account and update the account number" is a well-written user story because it expresses the requirement from the perspective of the person who receives the business value. It clearly identifies the user role, the need or capability, and the business outcome that the capability enables. The finance team member is the persona; receiving notification that an opportunity has been won is the needed information; and setting up billing details is the resulting business value. This structure gives the delivery team enough context to design the appropriate Salesforce automation, such as a record-triggered flow that creates a task or sends an alert when the opportunity reaches the Closed Won stage. It also supports productive follow-up conversations about acceptance criteria, including which finance queue or users receive the notification, what task details are required, and when the alert must be delivered. Salesforce business analysis practices emphasize documenting stakeholder needs in a clear, outcome-focused format that can be refined collaboratively into implementable requirements. See Salesforce Trailhead's Business Analysis Fundamentals and its Agile Basics learning resources.