

B2B Solution Architect Certification Prep: Discovery and Integration

Unit 1: Learn About Discovery and Customer Success

Learning Objectives

The Salesforce B2B Solution Architect credential is designed for individuals who have 4-5 years experience as a Solution Architect and is proficient in the following skills: have experience with the following topics with the above-mentioned Salesforce products:

- Describe how to document and articulate the business needs, value, and vision of the customer to support their desired business outcomes for a B2B multi-cloud solution.
- Define the future blueprint architecture of a B2B multi-cloud Salesforce solution to define the product roadmap, business need, and vision in the customer landscape.
- Define the incremental steps necessary to reach the recommended future end state that supports business outcomes.

Key Topics

This unit prepares you for the Discovery and Customer Success section of the Salesforce B2B Solution Architect exam, which makes up 25% of the overall exam. This section of the exam tests these topics.

- Documenting and articulating a customer's business needs, value, and vision
- Defining the product roadmap for a B2B multi-cloud solution
- Defining the incremental steps necessary to reach the recommended future end state of a B2B multi-cloud solution

This unit provides a number of interactive, real-world, scenario-based questions that are a lot like the ones you'll encounter as a Salesforce B2B Solution Architect. Looking at these questions helps prepare you to take the Discovery and Customer Success section of the Salesforce B2B Solution Architect exam. As you tackle the practice questions, you get immediate feedback on your answers, along with detailed information on why your answers are correct (or incorrect).

Preparing for the Exam

Preparing for the Salesforce B2B Solution Architect exam takes time! This module takes you through preparing for part of the exam. There is one additional module to help you continue your journey toward certification.

- B2B Solution Architect Cert Prep: Discovery and Integration


Both modules in this trail contain real-world scenario questions, interactive flashcards, links to resources, and key topic areas to study.

Don't forget to join the [Trailblazer Community](#), where you can ask questions, collaborate, and join groups to help you prepare for your exam.

Download the Guide

Would you like a hard copy of this module's content as a study aid? Download the [B2B Solution Architect Cert Prep: Delivery and Design](#) guide. (Each module in this trail includes a link to a printable version of the content that you can download.)

Exam Practice Questions

Ready to jump in? The sample tool below is not scored—it's just an easy way to quiz yourself. To use it, read the question, then click on the answer you think is correct. Some questions may have more than one correct answer. Click **Submit** to learn whether the answer you chose is correct or incorrect, and why. If there's a longer explanation, click  to expand the window, then click anywhere in the window to close it. When you reach the end, you can review the answers or retake the questions.

Scenario 1

What should a Solution Architect set up as the first project workshop for a new B2B multi-cloud project?

A	SPRINT PLANNING WORKSHOP	Incorrect. This is not the first thing to do at a kick-off meeting for a new project.
B	PROOF OF CONCEPT DEMO	Incorrect. This Proof of Concept Demo should happen at the end of a Sprint, to demonstrate the progress made to date. Each feature in the demo should align back to the Project Definition.
C	PROJECT DEFINITION WORKSHOP	Correct. This helps set the context and scope of the project to focus on the key problem they are trying to solve. A vision guide for the project helps deliver desired outcomes.
D	REQUEST FOR PROPOSAL CREATION	Incorrect. This is not relevant at the kick-off of a project. This usually happens before the engagement of any project, not one that is in progress.

Scenario 2

A company is looking to implement a multi-cloud solution and business leaders continue to ask for solution features they believe will improve the end-user experience.

What are two ways a Solution Architect can ensure that solution features are aligned to business needs and values?

A	ENSURE ALL USER STORIES REFERENCE AN END FOAL OR VALUE STATEMENT.	Correct. User stories include acceptance criteria clarifying the scope of the project or deliverable.
B	ENSURE ALL USER STORIES REFERENCE A SPECIFIC USER OR PERSONA.	Correct. Designing solutions for customers includes defining the end-user use case and needs.
C	ENSURE THE PROJECT MANAGER MAINTAINS A RISK LOG FOR ANY USER STORIES THAT DO NOT FOLLOW THE RIGHT FORMAT.	Incorrect. Project managers and team members should continuously review user story details, acceptance criteria, and any dependencies on a regular basis.
D	ENSURE THAT THE PROJECT SPONSOR ATTENDS EVERY GROOMING SESSION TO ENSURE THE USER STORIES ALIGN TO THE BUSINESS NEEDS AND VALUES.	Incorrect. The user story should be verbose enough where it does not require the project sponsor to constantly ensure and explain why it aligns with business needs and values. It should make sense to every member of the project and scrum team

Scenario 3

Which component of a blueprint would outline how data should be migrated between systems?

A	ENTITY RELATIONSHIP DIAGRAM	Incorrect. Entity Relationship Diagram describes the data definitions within one or many systems but not migration.
B	PROCESS FLOW	Incorrect. Process Flows describe the processes that drive the creation and migration of data.
C	SOLUTION ARCHITECTURE DIAGRAM	Correct. Solution Architecture Diagrams define the technical tools required to migrate data between systems.
D	REFERENCE ARCHITECTURE DIAGRAM	Incorrect. Reference Architecture Diagrams define the high-level view of the solution. They do not describe details required such as the movement of data between systems.

Scenario 4

Universal Containers is working to improve the customer experience by using insights to drive relevant offerings and self-service capabilities. It also wants to send personalized emails and offer self-service to resolve customer issues.

Which two products play a key role in a B2B e-commerce experience that resembles consumer buying experiences?

A	SALES CLOUD	Incorrect. In a self-service space there's generally no interaction with a sales rep thus there's need for traditional lead, account and opportunity management.
B	SERVICE CLOUD	Correct. Rapid, knowledgeable customer service is an essential part of the equation for B2B.
C	MARKETING CLOUD	Correct. This is necessary for sending personalized emails.
D	REVENUE CLOUD	Incorrect. Revenue Cloud doesn't play a role in delivering any of the key service & support, marketing capabilities that match the consumer experience.

Did you choose a wrong answer? Check out the table below for related study material.

Question 1	Complete the Trailhead module Learn Salesforce Agile Practices to learn what frequency is ideal for functionality reviews in each sprint.
Question 2	Refresh your knowledge on what a Solution Architect needs to ensure information in user stories supports the business requirements during User Story Creation .

Exam Topic Flashcards

The following flashcards cover architecture diagrams, B2B business models, and solution kits. Use these interactive flashcards to brush up on some of the key topics you'll find on this part of the exam.

Read the question or term on each card, then click or tap on the card to reveal the correct answer. Click the right-facing arrow to move to the next card, and the left-facing arrow to return to the previous card.

Card 1

What is a B2B business model?	When a company sells products or services to other companies, including partners, distributors, and others
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Card 2

What does a Salesforce Architecture Diagram show?	How different parts of a solution fit together and communicate with each other
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Card 3

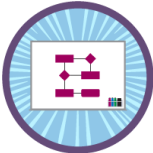


Solution Kits are used to:	Reduce the time to value for Salesforce implementations using Salesforce-approved best practices.
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Did you choose a wrong answer? Check out the table below for related study material.

Flashcard 1	Learn what is a B2B business model by completing the Trailhead module B2B Customer Relationship Basics .
Flashcard 2	Explore the different types of architecture diagrams by completing the Trailhead module Salesforce Architecture Diagrams: Quick Look .
Flashcard 3	Review the Trailhead module Salesforce Solution Kits: Quick Look to learn about Solution Kits.

Related Badges

Looking for more information? Explore these related badges.

<u>Badge</u>	<u>Content Type</u>
 Salesforce Architecture Diagrams: Quick Look	Module
 Salesforce Solution Kits: Quick Look	Module
 B2B Customer Relationship Basics	Module

 Innovation Project Definition	Module
 User Story Creation	Module

Congratulations! You've studied up on Discovery and Customer Success. Next, let's take a look at the Data Governance and Integration section of the exam.

Unit 2: Review Data Governance and Integration

Learning Objectives

After completing this unit, you'll be able to:

- Determine the existing customer architecture landscape.
- Define the data flows across systems, the methods and techniques to connect systems.
- Describe the strategy to migrate and synchronize data across systems to support a multi-cloud B2B solution.
- Explain how to design and map a sharing model for a B2B multi-cloud Salesforce solution.
- Provide governance to satisfy business requirements within expected data volumes.

Key Topics

This unit prepares you for the Design section of the Salesforce B2B Solution Architect exam, which makes up 26% of the overall exam. This section of the exam tests these topics.


- Determining the existing customer architecture landscape
- Defining data flows across systems
- Migrating and synchronizing data across systems
- Designing and mapping a sharing and visibility model
- Providing governance around data volumes

Like the previous unit, this unit contains interactive question questions and flashcards centered around study topics. They help you prepare for the Data Governance and Integration section of the exam.

Download the Guide

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Exam Practice Questions

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Scenario 1

What are two metadata types that a Solution Architect should include when documenting the data architecture of a Salesforce org?

A	RecordType	Correct. Under CustomObject metadata type, RecordType lets you capture different business processes, picklist values, and page layouts to different users.
B	CustomField	Correct. Under CustomObject metadata type, the CustomField is used to create, update, or delete custom field definitions on standard, custom, and external objects or standard field definitions on standard objects.
C	Document	Incorrect. The Document metadata represents only documents and not assets that pertain to how data is stored in a Salesforce org.
D	Security	Incorrect. The Security metadata represents organization settings related to a feature and not assets that pertain to how data is stored in a Salesforce org.

Scenario 2

has a private sharing model. The sales representative for the east coast has manually shared a contact and account record with another sales representative on the west coast. The Solution Architect is in the process of reviewing access levels.

Which two actions should the Solution Architect take to confirm the access level?

A	Confirm that the record in the table has Row Cause values of Manual and Owner.	Correct. On create, a sharing row is created in the ContactShare with the Row Cause Owner. On share, one is created with Row Cause Manual.
B	Export Group Maintenance Tables to review access levels.	Incorrect. Group Maintenance Tables are for inherited access and group membership grants.
C	Confirm that the record in the table has Row Cause values of Manual and Sharing.	Incorrect. On create, a sharing row is created in the ContactShare with the Row Cause Owner. On share one is created with Row Cause Manual.
D	Export Object Sharing Tables to	Correct. Object sharing tables are for

	review access levels.	explicit and implicit grants.
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Did you choose a wrong answer? Check out the table below for related study material.

Question 1	Review the Salesforce Metadata API Developer Guide to familiarize with the different types of metadata to include when documenting the data architect of a Salesforce org.
Question 2	Study Record-Level Access: Under the Hood to learn what actions to take to configure the appropriate access level.

Exam Topic Flashcards

The following flashcards cover sharing rules, large data volumes, and data skew. Use these interactive flashcards to brush up on some of the key topics you'll find on this part of the exam.

Read the question or term on each card, then click or tap on the card to reveal the correct answer. Click the right-facing arrow to move to the next card, and the left-facing arrow to return to the previous card.

Card 1

Front of card	Sharing rules work best when:
Back of card	They're defined for a particular group of users that you can determine or predict in advance.

Card 2

Front of card	You can define a sharing rule for:
Back of card	A single public group, role, or territory.

Card 3

Front of card	Data skew happens when:
Back of card	More than 10,000 child records are associated with the same parent record within an org.

Card 4



Front of card	External objects are best used when you have:
Back of card	Large amounts of data that can't be stored in Salesforce and only a small amount of that data is used.

Did you choose a wrong answer? Check out the table below for related study material.

Flashcard 1	Complete the Trailhead module Data Security to refresh your knowledge on when sharing rules works best.
Flashcard 2	Refresh your skills on how to define a sharing rule by completing the Trailhead module Data Security .
Flashcard 3	Explore when data skew happens by completing the Trailhead module Large Data Volumes .
Flashcard 4	Learn when external objects are best used by completing the Trailhead module Large Data Volumes .

Related Badges

Looking for more information? Explore these related badges.

<u>Badge</u>	<u>Content Type</u>
 Data Security	Module
 Large Data Volumes	Module

Congratulations! You've studied up on Data Governance and Integration. Next, let's take a look at the Operationalize the Solution section of the exam.

Unit 3: Learn How To Operationalize the Solution

Learning Objectives

After completing this unit, you'll be able to:

- Explain how to best manage a solution, including updating documentation and training.
- Describe how to improve the solution to ensure business benefits.
- Determine how to facilitate adoption so a business will benefit from a B2B multi-cloud solution.

Key Topics

This unit prepares you for the Operationalize the Solution section of the Salesforce B2B Solution Architect exam, which makes up 8% of the overall exam. This section of the exam tests these topics.


- Ensuring that stakeholders are enabled to manage the solution
- Determining how to further improve the solution
- Determining how to facilitate adoption

Like the previous unit, this unit contains interactive question questions and flashcards centered around study topics. They help you prepare for the Operationalize the Solution section of the exam.

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Exam Practice Questions

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Scenario 1

What are two suggested metrics for measuring user adoption of Salesforce?

A	<u>Login rates</u>	Correct. Login rates track how often users are logging in to Salesforce.
B	Time opportunities spend in a specific status	Incorrect. The time opportunities spent in a particular status does not measure user adoption of Salesforce.
C	Number of contacts each user creates	Incorrect. Creating contacts does not measure how a user adopts to Salesforce.
D	<u>Record creation</u>	Correct. Record creation shows how often users are interacting with the data.

Scenario 2

How can you drive long-term adoption of a new Salesforce implementation?

A	Provide access to previous systems.	Incorrect. If given the option, most users would choose not to change systems.
B	Ask users to create reports.	Incorrect. This may be part of enablement, but it won't drive adoption.
C	<u>Gather feedback.</u>	Correct. Gather feedback from reps, both on ideas for improvements and reports of things that aren't working properly. Both are equally important.
D	Provide users with dashboards.	Incorrect. Dashboards are a great way to organize and present data, but don't

		always drive adoption.
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Did you choose a wrong answer? Check out the table below for related study material.

Question 1	Complete the Trailhead trail Empower Your Salesforce Users to learn what metrics are ideal for measuring user adoption of Salesforce.
Question 2	Learn how to drive long-term adoption of new Salesforce implementations by completing the Trailhead module Salesforce Adoption Strategies .

Exam Topic Flashcards

The following flashcards cover data quality attributes and technical debt. Use these interactive flashcards to brush up on some of the key topics you'll find on this part of the exam.

Read the question or term on each card, then click or tap on the card to reveal the correct answer. Click the right-facing arrow to move to the next card, and the left-facing arrow to return to the previous card.

Card 1

Front of card	Center of Excellence
Back of card	Governing body for stakeholders across a company responsible for making decisions about Salesforce org

Card 2

Front of card	Data quality includes:
Back of card	Data accuracy and completeness.

Card 3

Front of card	Technical debt
Back of card	The ongoing cost of expedient decisions made when


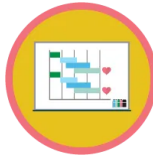
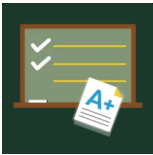
	implementing code
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Did you choose a wrong answer? Check out the table below for related study material.

Flashcard 1	Learn about the Center of Excellence governing body by completing the Trailhead module Nonprofit Cloud Implementation Best Practices .
Flashcard 2	Identify the different data qualities by completing the Trailhead trail Empower Your Salesforce Users .
Flashcard 3	Read the Salesforce article “ 5 steps to avoid a technical debt black hole ” to learn about technical debt.

Related Badges

Looking for more information? Explore these related badges.

<u>Badge</u>	<u>Content Type</u>
 Salesforce Adoption Strategies	Module
 Nonprofit Cloud Implementation Best Practices	Module
 Empower Your Salesforce Users	Trail

Congratulations. You've covered over 59% of the B2B Solution Architect Certification exam material in this badge.

You've reviewed these sections.

- Discovery and Customer Success
- Data Governance and Integration
- Operationalize the Solution

Be sure to review the other badge B2B Solution Architect Cert Prep: Discovery and Integration in the B2B Solution Architect study trail. Good luck on your exam!