

CRM: SFA Quiz

Answer Key

1. Salesforce automation is...
 - hiring multiple Salesforce administrators.
 - a system that automatically records all the stages in a sales process.*
 - an automatic report on accounts receivable.
 - performed only by developers.
2. An opportunity is created when...
 - a deal is closes.
 - a salesperson believes there is a reasonable chance to make a sale to this person.*
 - a quote has been rejected.
 - a salesperson receives a list of collected leads.
3. Case management allows _____ to be captured, then distributed to the right individual or team for resolution, while providing visibility of its ongoing status.
 - opinions
 - cases*
 - charges
 - opportunities
4. The funnel of potential sales that may be coming to fruition.
 - Pipeline*
 - Big Deals
 - Fastlane
 - Leads
5. The three areas that need to be in sync for an organization to be successful.
 - People, Problems, Technology
 - Salesforce, CRM, Internet of Things
 - Possibilities, Process, Technology
 - People, Process, Technology*
6. Which is NOT a category of CRM?
 - Partner Relationship Management
 - Salesforce Automation
 - Billing and Collections*
 - Customer Initiated Interactions
7. ATG recommends that the quoting process follow the FACT Framework.
 - True*
 - False
8. In the service provider realm, any person or entity that is not yet a customer is a _____.
 - client
 - prospect*
 - employee
 - liability
9. What is used to clearly demonstrate to the customer the options selected, the prices, and discounts available?

- Quote*
 - Invoice
 - Lead
 - Receipt
10. Establishing approval rules is one way to achieve effective risk management.
- True*
 - False
11. Often, the best opportunity for a company to win new business from an existing client is by providing superior customer service to that client from the beginning of the relationship.
- True*
 - False
12. There is only one accepted way to name pipeline stages.
- True
 - False*
13. What is FACT?
- Fast, Assume, Create, Tether
 - Fast, Accurate, Clean, Transactable*
 - Fast, Accrual, Clean, Translatable
 - Free, Accurate, Clean, Transactable
14. Sales management uses CRM: SFA reporting to track progress/status at the company, unit, division, customer, and individual sales representative level.
- True*
 - False
15. What do knowledge management systems usually NOT include?
- White Papers
 - Case Studies
 - Product and Service Manuals
 - Client References*