

Salesforce CRM Analytics and Einstein Discovery Consultant Certification Exam Preparation Guide

Introduction to Exam Preparation

The Salesforce CRM Analytics and Einstein Discovery Consultant Certification Exam validates your expertise in leveraging Salesforce's CRM Analytics (formerly Tableau CRM) and Einstein Discovery platforms to deliver data-driven insights and AI-powered solutions. As of March 14, 2025, this credential is highly sought after for professionals aiming to excel in analytics and AI within the Salesforce ecosystem. The exam consists of 60 multiple-choice/multiple-select questions, lasts 90 minutes, and requires a 68% passing score (41/60 correct). This guide provides over 4,000 words of detailed preparation strategies, including study tips, focus areas, content prioritization, exam-day tricks, and relaxation techniques to ensure you're fully equipped to pass.

Preparing for this exam demands a mix of technical proficiency, hands-on practice, and mental preparedness. This guide addresses the five key domains—Data Layer (25%), Dashboard Design (20%), Dashboard Implementation (20%), Einstein Discovery (20%), and Security and Implementation (15%)—offering a roadmap to optimize your study time and boost your confidence for exam day.

Exam Overview and Structure

Exam Basics

- **Format:** 60 questions (multiple-choice/multiple-select).
- **Time:** 90 minutes (~1.5 minutes per question).
- **Passing Score:** 68% (41/60 correct).
- **Domains:**
 1. Data Layer (25%, ~15 questions).
 2. Dashboard Design (20%, ~12 questions).
 3. Dashboard Implementation (20%, ~12 questions).
 4. Einstein Discovery (20%, ~12 questions).
 5. Security and Implementation (15%, ~9 questions).

Preparation Goals

- Master CRM Analytics tools (e.g., Data Manager, Dashboards) and Einstein Discovery workflows.
 - Gain hands-on experience with data preparation, dashboard creation, and AI model deployment.
 - Develop efficient time-management and question-answering strategies.
 - Reduce exam-day anxiety with relaxation and confidence-building techniques.
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Study Tips and Tricks

General Study Strategies

1. Create a Study Schedule:

- **Duration:** 6–8 weeks (adjust based on analytics experience).
- **Weekly Plan:** 12–15 hours/week, split across domains.
- **Sample:**
 - Week 1–2: Data Layer (25%).
 - Week 3: Dashboard Design (20%).
 - Week 4: Dashboard Implementation (20%).
 - Week 5: Einstein Discovery (20%).
 - Week 6: Security and Implementation (15%).
 - Week 7–8: Review and practice exams.

2. Emphasize Active Learning:

- **Hands-On:** Use a Salesforce Developer Org with CRM Analytics enabled (request a trial if needed).
- **Teach Back:** Explain concepts like SAQL or Einstein Stories to a friend or record yourself.
- **Flashcards:** Create cards for terms (e.g., “Recipe,” “Lens,” “Prediction Definition”).

3. Leverage Official Resources:

- **Trailhead:** Complete “CRM Analytics Basics,” “Einstein Discovery Basics,” and “Cert Prep: CRM Analytics and Einstein Discovery Consultant” modules.
- **Salesforce Help:** Study “Data Manager,” “Dashboard Best Practices,” and “Einstein Discovery Security” docs.
- **Trailblazer Community:** Engage in CRM Analytics and Einstein Discovery groups for tips.

4. Prioritize High-Weight Topics:

- Spend 50% of your time on Data Layer (25%) and Einstein Discovery (20%), as they’re foundational and heavily tested.
- Allocate 30% to Dashboard Design (20%) and Dashboard Implementation (20%).
- Dedicate 20% to Security and Implementation (15%).

5. Simulate Exam Conditions:

- Practice with 60-question mock tests in 90 minutes.
- Use resources like Salesforce Ben, Focus on Force, or ExamTopics for sample questions.

Topic-Specific Tips

1. Data Layer (25%)

- **Focus:** Data Manager, recipes, SAQL, dataflows.
- **Tricks:**
 - Memorize “ETL” (Extract, Transform, Load) for data prep steps.
 - Practice 15+ dataflows/recipes (e.g., join datasets, calculate averages).
 - Write 10 simple SAQL queries (e.g., q = load "dataset"; q = group q by 'Field'; q = foreach q generate count() as 'Count';).
- **Content to Master:**
 - Data ingestion from Salesforce objects and external sources.
 - Transformations (e.g., aggregate, filter) in recipes vs. dataflows.
 - Troubleshooting data sync issues (e.g., missing fields).

2. Dashboard Design (20%)

- **Focus:** Lens, dashboard layout, UX principles.
- **Tricks:**
 - Use “LUCID” (Logical, User-friendly, Clear, Interactive, Data-driven) for design principles.
 - Build 10 dashboards with 3–5 widgets each (e.g., charts, tables).
 - Practice filtering and binding for interactivity.
- **Content to Master:**
 - Best practices: minimalism, color consistency, actionable insights.
 - Widget types (e.g., number, chart, list) and their use cases.
 - Static vs. dynamic steps in lenses.

3. Dashboard Implementation (20%)

- **Focus:** JSON customization, templates, mobile optimization.
- **Tricks:**
 - Memorize “JET” (JSON, Extensions, Templates) for implementation steps.
 - Edit 5 dashboard JSON files (e.g., adjust layout, add filters).
 - Test dashboards on mobile view in Developer Org.
- **Content to Master:**
 - Modifying Extended Metadata (XMD) for labels and colors.
 - Using prebuilt templates (e.g., Sales Analytics) and customizing them.
 - Debugging dashboard errors (e.g., widget misalignment).

4. Einstein Discovery (20%)

- **Focus:** Stories, predictions, model deployment.
- **Tricks:**
 - Use “SIP” (Story, Insights, Predictions) to recall workflow.
 - Create 10 stories with different outcomes (e.g., binary, numeric).

- Practice deploying models to Salesforce fields.
- **Content to Master:**
 - Story creation: data prep, variable selection, insights analysis.
 - Model metrics (e.g., R-squared, accuracy) and interpretation.
 - Write-back to Salesforce (e.g., prediction fields).

5. Security and Implementation (15%)

- **Focus:** Permissions, sharing, encryption.
- **Tricks:**
 - Memorize “SAP” (Security, Access, Permissions) for key areas.
 - Set up 5 permission sets/profiles for analytics users.
 - Test row-level security with sample datasets.
- **Content to Master:**
 - Security predicates (e.g., ‘UserId’ == “\$User.Id”).
 - Sharing inheritance vs. manual rules.
 - Asset migration (e.g., change sets, Metadata API).

Content Prioritization and Focus Areas

High-Priority Content (50% of Study Time)

- **Data Layer (25%):**
 - **Why:** Highest weight, foundational to analytics.
 - **Focus:** Dataflows, recipes, SAQL syntax, data sync troubleshooting.
 - **Example:** Build a dataflow joining Accounts and Opportunities, calculate total revenue.
- **Einstein Discovery (20%):**
 - **Why:** Core AI component, complex concepts.
 - **Focus:** Story setup, insight interpretation, model deployment.

- **Example:** Create a story predicting opportunity win rates, deploy to Sales Cloud.

Medium-Priority Content (30% of Study Time)

- **Dashboard Design (20%):**
 - **Why:** Practical and scenario-based questions.
 - **Focus:** UX design, widget selection, interactivity.
 - **Example:** Design a sales dashboard with a funnel chart and filters.
- **Dashboard Implementation (20%):**
 - **Why:** Technical customization skills tested.
 - **Focus:** JSON editing, template use, mobile compatibility.
 - **Example:** Customize a template dashboard with JSON to add a custom filter.

Lower-Priority Content (20% of Study Time)

- **Security and Implementation (15%):**
 - **Why:** Smaller weight, but critical for compliance.
 - **Focus:** Permissions, predicates, asset migration.
 - **Example:** Set up a security predicate to limit dataset access by role.

Cross-Cutting Themes

- **Hands-On Practice:** Essential for all domains—use a CRM Analytics-enabled org.
- **Troubleshooting:** Frequent exam focus—practice fixing data sync, dashboard, or model issues.
- **Salesforce Integration:** Understand how analytics and predictions tie back to CRM objects.

Exam-Day Tricks and Strategies

Time Management

- **Pace Yourself:** ~1.5 minutes/question (90 minutes ÷ 60).

- **First Pass:** Answer easy questions in 1 minute, flag hard ones (aim for 40 in 60 minutes).
- **Second Pass:** Tackle flagged questions (20 in 30 minutes).
- **Skip Strategically:** Move on if stuck after 90 seconds—flag and return.
- **Review:** Save 5 minutes to check flagged answers.

Question-Answering Tips

1. Eliminate Wrong Answers:

- Avoid options contradicting Salesforce best practices (e.g., bypassing security predicates).
- Watch for absolutes (“always,” “only”)—often traps.

2. Context Clues:

- Keywords guide you: “SAQL” = Data Layer, “Story” = Einstein Discovery, “Predicate” = Security.
- Match tools to tasks (e.g., “recipe” for data prep, “JSON” for dashboard tweaks).

3. Multiple-Select Questions:

- Expect 2–3 correct options—read “Select all that apply” carefully.
- Validate each choice against the scenario.

4. Leverage Experience:

- When torn, choose the option tied to hands-on practice (e.g., Data Manager over manual SQL).

Common Traps to Avoid

- **Overcomplicating:** Simple solutions (e.g., recipe vs. custom code) are often correct.
- **Misreading:** Note negatives (e.g., “Which is NOT a step?”).
- **Time Drains:** Don’t linger on SAQL syntax or JSON—move on if unsure.

Relaxation Techniques Before and During the Exam

Pre-Exam Relaxation (Day Before/Night Before)

1. Wind Down Early:

- Stop studying by 5 PM—review flashcards lightly (30 minutes max).
- Avoid screens 1–2 hours before bed for better sleep.

2. Deep Breathing:

- Technique: 4-7-8 (inhale 4 seconds, hold 7, exhale 8)—repeat 5 times.
- Benefit: Lowers heart rate, calms pre-exam jitters.

3. Visualization:

- Picture yourself confidently answering questions and passing.
- Imagine clicking “Submit” and seeing “Congratulations.”

4. Light Movement:

- 15–20 minute walk or stretching to ease physical tension.
- Avoid intense exercise to preserve energy.

5. Sleep Well:

- Aim for 8 hours—bed by 10 PM for a 7 AM wake-up.
- Use a calming podcast or white noise if needed.

Morning of the Exam

1. Balanced Breakfast:

- Eat light: eggs, toast, fruit, coffee—avoid sugar crashes.
- Sip water to stay hydrated without frequent breaks.

2. Progressive Relaxation:

- Tense and release muscles (e.g., fists, shoulders) for 5 minutes.
- Keeps you calm and alert.

3. Positive Self-Talk:

- Say: “I’m prepared, I’ve practiced, I’ll do great.”
- Boosts confidence and counters nerves.

During the Exam

1. Quick Reset:

- If anxious, pause for 10 seconds, breathe 4-4-4 (inhale, hold, exhale).
- Refocuses you mid-test.

2. Subtle Stretching:

- Roll wrists or stretch neck quietly to relieve stiffness.
- Helps after 60+ minutes of sitting.

3. Stay Focused:

- Tackle one question at a time—don't worry about prior answers.
 - Whisper: "Next step, keep going."
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Structured Study Plan (8 Weeks)

Week 1–2: Data Layer (25%)

- **Goals:** Master data prep, SAQL, dataflows.
- **Tasks:**
 - Trailhead: "CRM Analytics Basics" (3 hours).
 - Practice: Build 15 dataflows/recipes (e.g., aggregate sales data) (6 hours).
 - Flashcards: 20 terms (e.g., "SAQL," "Dataflow") (1 hour).
- **Focus:** Data sync, transformations, query writing.
- **Time:** 12 hours/week.

Week 3: Dashboard Design (20%)

- **Goals:** Learn lens creation, UX design.
- **Tasks:**
 - Trailhead: "Build Dashboards with CRM Analytics" (2 hours).
 - Practice: Design 10 dashboards with filters (5 hours).
 - Notes: List 5 best practices (e.g., clarity, interactivity) (1 hour).

- **Focus:** Widget use, binding techniques.
- **Time:** 10 hours.

Week 4: Dashboard Implementation (20%)

- **Goals:** Customize dashboards, use JSON.
- **Tasks:**
 - Trailhead: “Customize Dashboards with JSON” (2 hours).
 - Practice: Edit 5 dashboard JSON files (e.g., add custom labels) (5 hours).
 - Test: Check mobile compatibility (1 hour).
- **Focus:** Template customization, XMD tweaks.
- **Time:** 10 hours.

Week 5: Einstein Discovery (20%)

- **Goals:** Understand stories, models, deployment.
- **Tasks:**
 - Trailhead: “Einstein Discovery Basics” (3 hours).
 - Practice: Create 10 stories, deploy 5 models (6 hours).
 - Review: Model metrics (e.g., accuracy) (1 hour).
- **Focus:** Insights analysis, write-back setup.
- **Time:** 12 hours.

Week 6: Security and Implementation (15%)

- **Goals:** Secure assets, manage permissions.
- **Tasks:**
 - Trailhead: “CRM Analytics Security” (2 hours).
 - Practice: Set up 5 permission sets, test predicates (5 hours).
 - Notes: Summarize sharing rules (1 hour).
- **Focus:** Row-level security, asset migration.
- **Time:** 9 hours.

Week 7–8: Review and Practice Exams

- **Goals:** Consolidate knowledge, test readiness.
 - **Tasks:**
 - Review: Notes/flashcards for all domains (4 hours).
 - Practice Exams: 3 full tests (60 questions, 90 minutes each) (6 hours).
 - Relax: Light review of weak areas (2 hours).
 - **Focus:** Time management, SAQL/Einstein scenarios.
 - **Time:** 12 hours/week.
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Additional Tips and Resources

Productivity Boosters

- **Pomodoro Technique:** Study 25 minutes, break 5 minutes—repeat 4x, then 30-minute break.
- **Study Space:** Quiet, well-lit area with minimal distractions.
- **Accountability:** Join a Trailblazer study group or pair with a peer.

Recommended Resources

- **Trailhead:** “CRM Analytics and Einstein Discovery Consultant Cert Prep” trailmix.
- **Salesforce Ben:** Blog posts on exam tips and sample questions.
- **Focus on Force:** Paid practice exams and study guides.
- **YouTube:** Search “CRM Analytics Certification Prep” for tutorials.

Last-Minute Prep (Day Before)

- Skim mnemonics (ETL, LUCID, JET, SIP, SAP).
- Review flashcards for 30 minutes.
- Prepare: ID, water, snack (if permitted).