



Salesforce + realfast Playbook

The AI-Native Implementation Partner for SMBs

Discovery Questions

For IT, Admin & Ops Personas

Use these questions to surface technical pain, tech debt, and delivery bottlenecks that block your next deal.

Question	What to Listen For	Why It Matters (for the AE)
"How long does it take your current partner to respond to a simple change—like adding or removing a field?"	"It takes weeks," "we're in a backlog," "we're afraid to touch it."	This is a BA Bottleneck . Realfast's <i>ExoHelp</i> ("BA-in-a-Box") analyzes orgs for breaking changes in under 15 minutes—removing the #1 delay that stalls projects and renewals.
"Are there projects you'd love to start—like Agentforce or a new Cloud—but can't because your org is 'too complex'?"	"Our org's a mess," "too customized," "we have too much tech debt."	This is a Stuck Deal —an untapped upsell. Realfast untangles legacy setups (e.g., Process Builder to Flow) and unlocks your next sale.
"If your current partner disappeared tomorrow, would you have the documentation to run the system?"	"No," "our docs are outdated," "they keep it to themselves."	Traditional SIs build dependency. Realfast's AI-native process automatically generates documentation—giving customers control and you credibility.
"When you think about a new Salesforce implementation, how do you plan for ongoing admin costs?"	"We can't afford a full-time admin," "that's a \$65k blocker."	A classic SMB objection . Realfast's <i>ExoHelp</i> acts as an AI admin—removing that cost barrier and keeping your deal moving forward.

Pro tip: These questions work best when paired with empathy—"I hear this all the time from SMBs trying to modernize their orgs..."



For Executives, Sales & Vertical Leaders

Use these to connect Realfast's AI-native approach to revenue growth, efficiency, and C-level priorities.

Question	What to Listen For	Why It Matters (for the AE)
"Has your CEO or board asked for an 'AI strategy,' but you're still figuring out what that actually means for your team?"	"Yes, we have a mandate but no plan," "it feels abstract," "we don't know where to start."	Common across industries. Realfast turns vague AI mandates into executable roadmaps—like an <i>Lead Nurture Agent</i> or <i>Case Routing Agent</i> —so your deal moves from vision to value.
"Have you already tried building an AI assistant or chatbot, but it didn't stick?"	"It wasn't accurate," "users didn't trust it," "our data isn't ready."	Classic Agentforce stall . Realfast preps the data foundation (Data360 + knowledge sources) to ensure Agentforce actually performs—and drives adoption.
"Are your [recruiters / loan officers / agents] spending too much time on manual admin instead of closing?"	"Too much busywork," "we can't scale headcount," "our pipeline is too slow."	That's not a tech issue—it's a revenue issue . Realfast builds industry-specific AI agents (Recruiting Assistant, SDR Agent, etc.) that give teams hours back every day.



Play 1: The "Stuck Deal" Accelerator

AE Objective: Find a customer who is "stuck" on tech debt and turn them into a new cloud + services deal.

Email Subject: Your next Salesforce project, unlocked (in 15 minutes)

Email Template:

Hi [Customer Name],

I talk to many leaders who *want* to buy [Agentforce / Experience Cloud / FinServ Cloud] but are blocked by existing tech debt. The "old way" of implementation often made their org too complex to touch.

My partner, Realfast, is different. They are an AI-native partner whose **ExoCode** agent can analyze your entire org for breaking changes and dependencies in minutes—a process that takes traditional partners weeks.

Let's find 15 minutes. We can untangle your org and unlock your next big project.

Call Talk Track:

"I talk to AEs all the time who have a deal stall because the customer says, 'We can't buy more, our org is too complex.' That's not a lost deal; it's an opportunity. Realfast uses its AI tools to untangle that tech debt—fast. They make the org safe to build on and clear the path for your upsell, turning that objection into your next sales opportunity."



Play 2: The Agentforce "Do-Over"

AE Objective: Re-engage a customer with a stalled or failed Agentforce/AI project by solving the *real* problem (data).

Email Subject: The real reason your AI project stalled (and how to fix it)

Email Template:

Hi [Customer Name],

We've seen a pattern: 90% of Agentforce struggles start *before* the agent is even built. Why? The data isn't ready.

AI is only as good as the data it's fed.

My partner, Realfast, specializes in the one step most partners miss: using AI to prepare and structure your data so Agentforce can *actually* work.

Let's schedule 30 minutes to discuss how we can lead with **Data Cloud** to **guarantee** your **Agentforce** project succeeds.

Call Talk Track:

"AEs who sell Agentforce alone often see it fail, and the customer blames the platform. We change the play: We lead with Data Cloud first. Realfast is an expert in wrangling the data to create the foundation. This guarantees your Agentforce deal succeeds, drives the consumption metrics you're measured on, and makes the customer a hero."



Play 3: The "Make Your Month" New Logo (Q4 Magic)

AE Objective: Close a new, standard SMB logo (e.g., Sales Cloud, or a vertical cloud for Recruiting/FinServ) *this quarter* by overcoming the "admin" objection.

Email Subject: A 3-Week Salesforce Quick Start + an AI Admin

Email Template:

Hi [Customer Name],

For new SMBs, the two biggest blockers to signing are implementation timelines and the cost of a full-time admin.

My AI-native partner, Realfast, solves both.

1. **Speed:** They offer a **3-Week Quick Start** for [Sales Cloud / Recruiting Cloud / etc.], using AI tools to deliver faster and at a value price.
2. **Cost:** They include **ExoHelp**, their "BA-in-a-Box," which acts as an affordable AI admin to remove that \$65k+ blocker from the deal.

Let's chat. Realfast is built to run 3-week sales cycles and help me get you live *this month*.

Call Talk Track:

"We align our entire process to help you close deals this month. For your new logos, we're fast—a 3-week quick start. And when the prospect objects, 'I can't afford a \$65k admin,' you can now say, 'You don't need one. Realfast's ExoHelp tool is your AI-admin,' and close the deal."

Let's Win Your Next Deal, Together.

Call to Action:

- Bring us into your next SMB conversation.
- Book a 15-min Scoping Call for your key account.