

Discovery Questions & Sales Plays

Salesforce & ketteQ Playbook



Discovery Questions for ketteQ Supply Chain Planning

PERSONA

IT/System Owners (Ops + Tech Lens)

Question	What to Listen For	Why It Matters
How are you managing demand planning, supply planning, and capacity planning today?	Spreadsheet reliance, manual handoffs, point tools (Excel, SAP APO, Kinaxis)	Indicates fragmented processes; ketteQ unifies planning inside Salesforce
What ERP are you running, and how well does it integrate with your planning workflows?	SAP, Oracle, Dynamics; siloed data, delayed insights, high IT dependency	ERPs are built for transactions—not dynamic, adaptive planning
How quickly can you respond to a major supply or demand disruption?	"It takes days/weeks," "we scramble," "we can't simulate impacts fast enough"	Agility is essential—ketteQ enables scenario planning directly in Salesforce

PERSONA

VP Supply Chain/COO/Manufacturing Exec

Question	What to Listen For	Why It Matters
What's your strategy to improve supply chain resiliency in the next 12–18 months?	"Investing in AI," "need better visibility," "digital twins," "we're reactive"	Highlights opportunity for ketteQ as the AI-ready Supply Chain Cloud
Are your planning systems set up to scale as your operations grow?	"Outgrowing spreadsheets," "systems don't talk," "global rollout is tricky"	Signals readiness for a modern, scalable planning solution on Salesforce
When you take an order, can you tell your customers when they can expect delivery, and then actually come through?	"At best we use rule of thumb to give a promise data, which may meet their needs or may not be achievable. This leads to our struggle to deliver on time and in full as promised, causing customer satisfaction issues."	ketteQ has AI-driven solvers that test every possibility to best apply capacity and predict and manage accurate delivery dates, leading to happier customers and better revenue goals

Discovery Questions for ketteQ Supply Chain Planning

PERSONA

Sales, Ops, or Finance Leaders

Question	What to Listen For	Why It Matters
How aligned are sales forecasts with supply chain plans?	"Disconnected," "we chase forecasts," "finance doesn't trust supply plans"	ketteQ closes the loop between planning and Sales Cloud
Do you have visibility into inventory, supply constraints, or margin impacts in real time?	"Not really," "takes a while to get," "different systems"	Real-time planning data empowers better cross-functional decisions



Sales Play 1

Modernize Your ERP Planning Stack

AE Objective:

Use ERP friction to land ketteQ + Salesforce as the intelligent planning layer.

Email Subject:

Your ERP wasn't built to plan. ketteQ was.

Email Template:

Hi [First Name],

ERPs were designed to record transactions—not to plan the future. That's why manufacturers like [Customer X] are adopting ketteQ, the Salesforce-native Supply Chain Cloud, to modernize how they plan across demand, supply, and capacity.

With ketteQ + Salesforce, you can:

- Eliminate spreadsheets and disconnected point tools
- Enable real-time planning collaboration across teams
- Respond to volatility faster with AI-driven scenarios and tariffs.

Let's schedule 30 minutes to talk through how your team is planning today—and how we can help you scale smarter.

Call Talk Track:

"Manufacturers keep telling us the same thing—their ERP wasn't built to plan, and everything else is stitched together manually. ketteQ gives them a smarter way to plan directly inside Salesforce—finally connecting sales, finance, and operations with real-time intelligence."



Sales Play 2

The QBR + Expansion Play

AE Objective:

Protect the base. Use renewal or QBR moments to introduce ketteQ and expand platform usage.

Email Subject:

Align on Supply Chain Intelligence Ahead of Renewal

Email Template:

Hi [First Name],

Ahead of your Salesforce renewal in [MM/YY], we're seeing many of our manufacturing customers bring planning and operations onto the platform. With ketteQ, you can modernize planning for supply, demand, and production—while still leveraging Sales and Service Cloud.

Let's align on a roadmap for how your Salesforce investment can support supply chain resiliency, scenario planning, and smarter cross-functional collaboration.

Call Talk Track:

"Renewals are a great time to align on where the platform is going. The top opportunity we're seeing? Manufacturers are bringing planning workflows directly into Salesforce with ketteQ to drive real results across QBRs, forecasts, and operational execution."



Sales Play 3

Lay the Foundation for AI + Agentforce

AE Objective:

Drive net-new interest by tying disconnected data to missed AI opportunity.

Email Subject:

AI Can't Plan with Dirty Data

Email Template:

Hi [First Name],

AI and autonomous agents are transforming how manufacturers plan, predict, and adapt. But most companies can't take advantage—because the data they need is buried in legacy ERPs or spreadsheets.

That's where ketteQ comes in. As the native Supply Chain Cloud on Salesforce, ketteQ gives you:

- Clean, real-time planning data
- Operational workflows ready for agents
- A foundation for real-world AI use cases

15 minutes this week? I'd love to show you what's possible when planning meets AI.

Call Talk Track:

"Agentforce is only as good as the data behind it. ketteQ makes sure your agents aren't just engaging customers—but planning intelligently behind the scenes. That's how the leaders are scaling."



