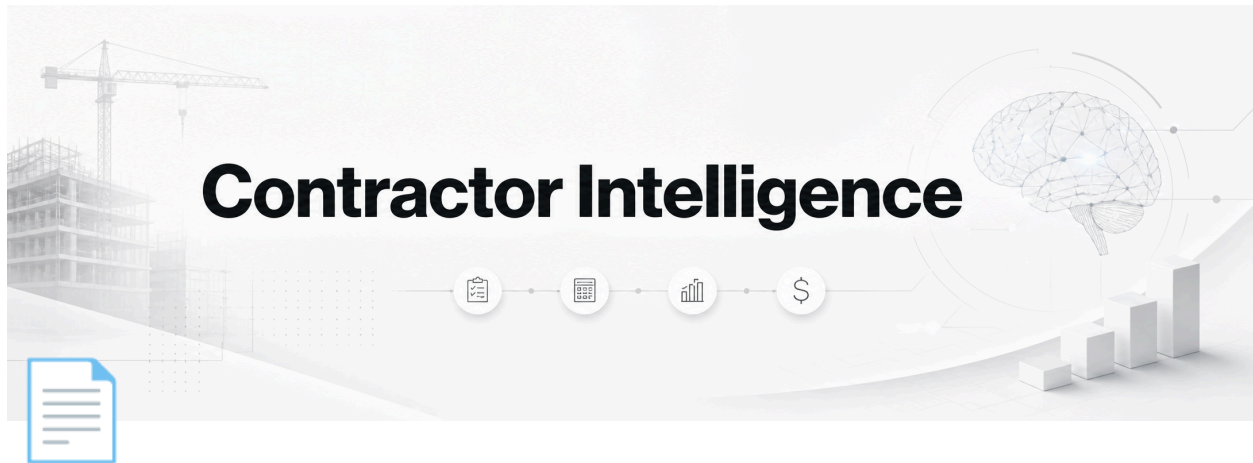




Contractor Intelligence: Salesforce-Native GTM Intelligence for Contractor SaaS

A portfolio proof-of-concept for turning contractor market signals, account context, and customer lifecycle data into governed Salesforce workflows.

| Note: This is a proof-of-concept built for portfolio demonstration.

Executive Summary

Contractor Signal Engine is a working proof-of-concept for using Agentforce, Salesforce, and contractor-specific intelligence to help GTM teams turn market, account, call, and customer signals into action.

The MVP starts with contractor search and enrichment: finding high-fit accounts, creating qualified Salesforce Leads, drafting reviewed outreach, creating follow-up tasks, and saving intelligence back into Salesforce through an AgentIQ panel.

The broader pattern is a contractor signal engine: public market data, account context, product usage, AI call outcomes, billing/support signals, and customer health data become Salesforce-native workflows for sales, marketing, customer success, routing, and management.

Agentforce orchestrates. Contractor Signal Engine enriches. Salesforce governs. Humans review and act.

Built in the prototype: Agentforce search, contractor enrichment, durable Campaign Run context, qualified Lead creation, draft outreach, follow-up task creation, and AgentIQ Lead intelligence.

What This Proves

- Agentforce can orchestrate a real GTM workflow without becoming the system of record.
- Contractor market signals can be converted into structured Salesforce intelligence.
- External research and internal account signals can become repeatable CRM workflows, not one-off AI summaries.
- Salesforce can persist selected enrichment, Lead context, draft outreach, and rep tasks for reliable handoffs.
- The same pattern can support outbound, inbound/product-led conversion, customer expansion, churn prevention, routing, and manager workflows.
- Reps, CSMs, and managers remain in control of customer-facing actions.
- Contractor Signal Engine can act as an intelligence layer that plugs into Salesforce, Agentforce, AI call workflows, Slack, and existing GTM systems.

Demo Walkthrough

1. Agentforce Search

Prompt: "Find electricians in St. Augustine, FL with the most reviews."

Output: ranked contractor prospects with rating, review count, website, phone, score, and campaign context.

Demo 1: Agentforce Contractor Search

attachment:d34441ed-56a5-47f8-842d-725ec3a087c1:RevCam_Propecting_Hub_Salesforce_-_Google_Chrome_-_1_May_2026.mp4

2. Enrich Selected Contractor

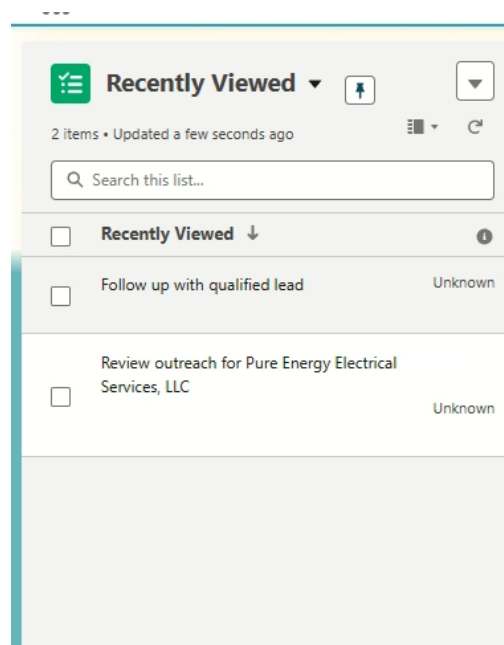
Prompt: "Enrich number 3."

Output: ICP score, website quality, recommended pitch, pain points, demo path, AI call workflow payload, and email draft.

3. Create Qualified Lead + Draft Outreach for Review

Prompt: "Create a qualified Lead and draft outreach for rep review. Do not send the email."

Output: Salesforce Lead, saved fields, reviewed email draft, and follow-up task.



4. AgentIQ Lead Panel

Output: rep opens the Lead and sees saved intelligence: score, pitch, next action, pain points, AI call workflow script, and follow-up draft.

Demo 4: AgentIQ Lead Intelligence

LEAD IDENTITY

Company	Website	Phone	Email
Cooper Electrical Services, LLC	https://saintaugustineelectrician.com/	(904)	
Industry / Trade	City	State	
electricians	St. Augustine	FL	

INPUT / OVERRIDE

Trade	City / State	Website URL
electricians	St. Augustine, FL	https://saintaugustineelectrician.com/

Refresh Analysis

Save Brief to Lead

Mark Qualified

Create Follow-Up Task

ICP Score

75

Website Quality

60

RevCam Status

Enriched

Next Best Action

Reach out with a personalized email highlighting their lack of photo galleries and how document and share their electrical projects more professionally.

Overview

Rep Brief

Call

Salesforce Fields

Raw JSON

Why They Fit

Cooper Electrical Services is a family-owned electrician business serving multiple commercial and residential clients across Northeast Florida. Their broad service offering and multiple active projects suggest a need for organized photo documentation, streamlined communication with crews and clients, and professional reporting to build trust and reduce rework.

Recommended Pitch

Lead with their site has clear service descriptions for commercial, residential, low voltage, lighting design, emergency and preventative services and no photo gallery or before/after project photos visible on website. Validate whether without visible project galleries or before/after photos, they may struggle to consistently document work visually for clients and internal use. Demo Photo and Video Capture, Annotations and Markups, AI-Powered Checklists and Reporting as a practical way to improve jobsite photo documentation, customer trust, and sales-to-production handoffs.

Demo Angle

Start by showing how easy it is to capture and organize job site photos with automatic time-stamping and geotagging. Then demonstrate annotations to clarify electrical issues or installations.

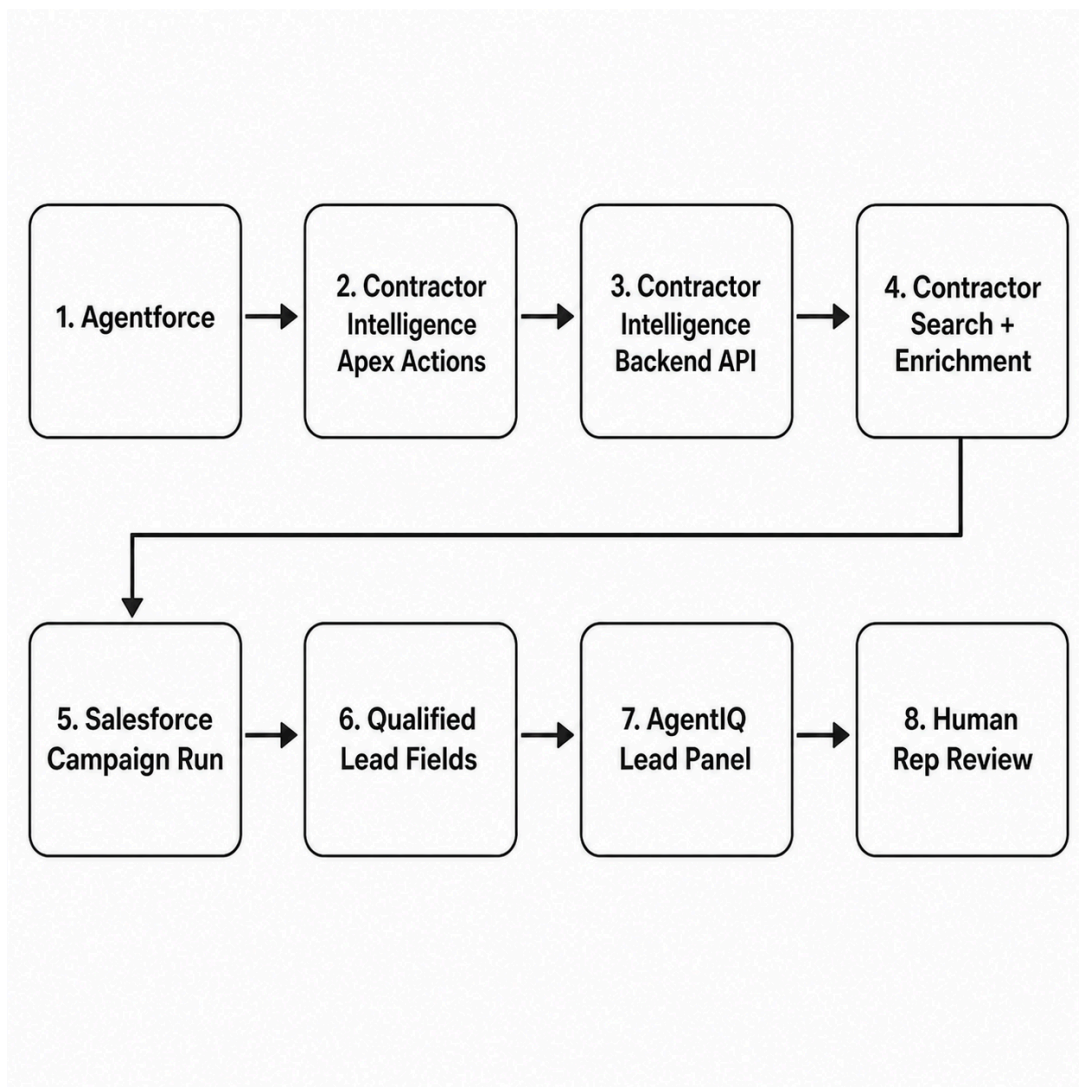
Residential and Commercial Electrical Services | Cooper Electrical Services | Northeast Florida

0 Skip to Content Home About Us Services

Commercial Residential Low Voltage Lighting Design Emergency & Preventative Our Work (904)

REQUEST AN ESTIMATE Open Menu

System Architecture



The key architecture decision is that Agentforce handles orchestration, while durable workflow state lives in Salesforce instead of temporary chat memory. Search context, selected enrichment, Lead fields, draft outreach, and follow-up tasks are persisted so the system is reliable, auditable, and usable beyond a single chat session.

Layer	Role
Agentforce	Routes user requests and orchestrates actions

Layer	Role
Apex Actions	Connect Agentforce to the backend and Salesforce records
Backend	Handles contractor search, enrichment, scoring, and payload generation
Salesforce Campaign Run	Stores search context and selected enrichment
Salesforce Lead	Becomes the source of truth for qualified prospects
AgentIQ	Gives reps saved intelligence directly on the Lead record
Human Rep	Reviews outreach, validates fit, and owns customer-facing action

MVP Workflow

1. User asks Agentforce to find contractor companies in a market.
2. Contractor Intelligence searches and ranks prospects.
3. User selects a company to enrich.
4. Contractor Intelligence generates the score, rep brief, pitch, demo path, and agent call payload.
5. Selected enrichment is saved to Salesforce Campaign Run context.
6. User approves Lead creation and outreach drafting.
7. Salesforce stores the qualified Lead, AgentIQ intelligence, reviewed draft, and follow-up task.

The system does not automatically send email. It drafts outreach and creates follow-up tasks so reps stay in control.

The Most Important Technical Lesson: Durable State

The first version worked in isolated tests, but real agent workflows exposed a production-style failure mode: large escaped JSON handoffs between actions were brittle.

The fix was to persist selected enrichment into Salesforce Campaign Run context, then have downstream actions resolve from saved CRM state.

That moved the system from a chat-style demo to a CRM-safe workflow. The selected contractor, enrichment payload, Lead creation, draft outreach, and rep handoff resolve from saved Salesforce context instead of temporary chat memory.

For GTM systems, that matters because teams need reliable records, auditability, and durable handoffs, not one-off AI outputs.

Case Study Thesis

Contractor and field-service businesses create useful GTM signals before and after they enter the funnel: reviews, service areas, project types, website quality, documentation gaps, crew complexity, product usage, call outcomes, billing events, support history, and customer health signals.

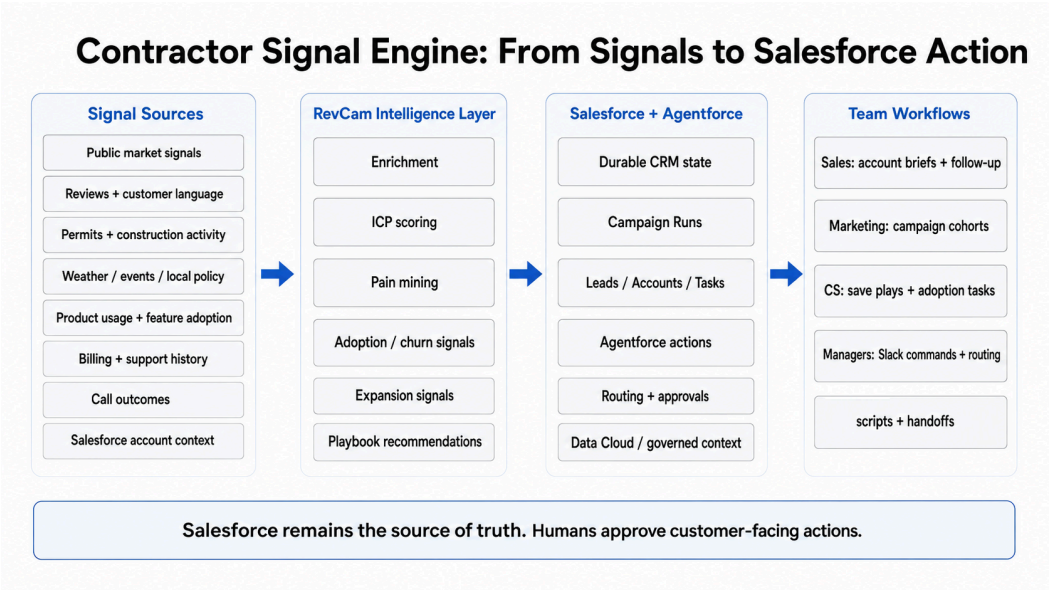
The opportunity is to turn those signals into Salesforce-native workflows that help teams prioritize accounts, personalize outreach, prepare for calls, route follow-up, improve onboarding, identify expansion opportunities, and reduce churn without adding another disconnected tool.

The MVP proves the pattern through contractor prospecting, but the same architecture can support a broader GTM lifecycle across sales, marketing, customer success, and management.

Contractor Signal Engine

The larger opportunity behind Contractor Intelligence is not just lead enrichment. It is a scalable contractor signal engine that can gather public market signals, internal customer signals, and Salesforce context, then turn that intelligence into approved GTM workflows.

A rep, CSM, or manager could never manually research every permit, review pattern, local event, account signal, adoption gap, billing issue, and call outcome across every market. AI makes that research scalable, but Salesforce still governs workflow, ownership, records, and next actions.



The same signal engine can support different GTM motions depending on the source data, workflow owner, and approval path.

Signal Category	Example Signals	What Contractor Intelligence Produces	Supported Motion
Market Expansion Signals	Permits, construction activity, service-area growth, multi-location indicators, hiring signals	ICP score, campaign cohort, market summary, recommended routing	New market / outbound
Review + Pain Signals	Google reviews, customer language, complaints about communication, scheduling, trust, project visibility, or proof	Pain hypotheses, messaging angles, Call questions, rep brief	Sales + marketing
Weather / Event Signals	Storm activity, seasonal demand, insurance/restoration	Timely campaign cohort, urgency-	Marketing + sales

Signal Category	Example Signals	What Contractor Intelligence Produces	Supported Motion
	pressure, local market events	based messaging, territory alert	
Local Policy / Compliance Signals	County rules, licensing changes, permitting requirements, trade-specific regulation changes	Contractor-specific insight, campaign angle, rep talking points	Sales + marketing
Inbound / PLG Signals	Signup source, company fit, website context, product activity, early usage	Sales-assist score, routing recommendation, onboarding task	PLG conversion
Product Adoption Signals	Low report/checklist adoption, low team invites, low sharing activity, unused features	Adoption gap summary, CSM play, enablement task	Customer success
Customer Growth Signals	More jobs, more locations, increased project volume, team growth	Expansion signal, AE/CSM task, upsell play	Expansion
Billing / Support Signals	Denied payments, support issues, unresolved tickets, billing friction	Risk summary, save-play draft, escalation task	Retention
AI Call / Conversation Signals	Call qualification, objections, interests, requested demos, next steps	Salesforce update, rep handoff, follow-up draft, playbook feedback	Sales + RevOps

The value is not scalable research for its own sake. The value is turning research into structured Salesforce actions that sales, marketing, CS, and managers can actually use.

AI Opportunity Map

The signal engine can support multiple GTM motions: new market expansion, outbound, inbound/product-led conversion, campaign planning, customer success, expansion, churn prevention, and management visibility.

Contractor Intelligence is one example of a broader GTM systems pattern: use AI to convert scattered contractor, customer, call, product, billing, and account signals into structured action inside Salesforce and the tools teams already use.

The goal is connected intelligence where teams already work.

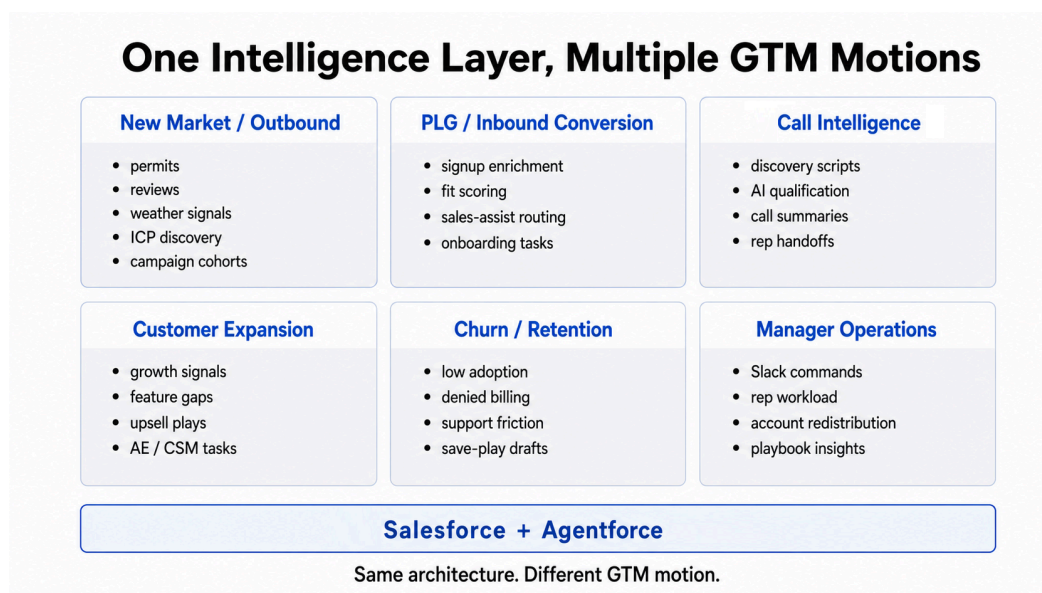
Opportunity	AI Pattern	GTM Use Case
Contractor Intelligence + ICP Discovery	LLM + search + enrichment	Turn websites, reviews, service areas, trade signals, multi-location indicators, and documentation gaps into prioritized Leads, account cohorts, and market expansion opportunities.
Review-Based Pain Mining	Text analysis + customer language extraction	Analyze reviews and customer language to identify communication gaps, scheduling pain, trust issues, project visibility needs, and proof/documentation problems that can inform messaging and Call questions.
PLG / Inbound Conversion Intelligence	LLM summaries + account scoring + routing	Enrich signups or inbound accounts with contractor context, score fit, recommend routing, and create rep or onboarding tasks when human follow-up is useful.
AI Call Pre-Call + Post-Call Loop	Voice AI + structured call payloads	Use enrichment to generate discovery scripts, then write call qualification, call summaries, objections, next steps, and rep handoff notes back into CRM.
Customer Expansion / Churn AgentIQ	LLM summaries + product/customer signals	Identify low feature adoption, billing risk, reduced activity, support issues, growth signals, and expansion opportunities; recommend CSM plays and create follow-ups.
Slack Manager Command Layer	Agent orchestration + workflow automation	Let managers run campaigns, check unreviewed drafts, summarize Call outcomes, redistribute high-priority accounts, review churn risk, and ask rep/account questions.
Salesforce Team Orchestration	Agentforce + CRM workflow automation	Connect Sales, Marketing, CS, RevOps, and leadership around shared account context,

Opportunity	AI Pattern	GTM Use Case
		routing logic, tasks, playbooks, lifecycle stages, and customer history.
Intelligent Playbooks	LLM + outcome feedback loops	Use review pain, Call outcomes, rep disposition, CS outcomes, product adoption, and conversion data to improve sales plays, CS plays, routing, and messaging by trade or segment.
AI-Ready GTM Data Infrastructure	Data Cloud / CRM data model + governed AI actions	Structure Salesforce, Call, product usage, billing, support, marketing, and account history so agents can safely summarize, recommend, and trigger approved workflows.

The common thread is not outbound alone. It is turning scattered GTM context into governed Salesforce action across the full customer lifecycle.

Lifecycle Expansion Paths

Once the first workflow proves adoption and measurable value, the same architecture can support new market motion, existing funnel conversion, and customer lifecycle automation.



New Market / Outbound Motion

Use contractor intelligence, review mining, permit activity, weather/storm signals, local policy changes, hiring signals, and website gaps to identify high-fit accounts and create Salesforce campaign cohorts for rep review.

PLG / Inbound Conversion

Enrich inbound signups or product-qualified accounts with contractor context, usage data, review signals, and market fit; route the right accounts to reps or onboarding teams when human follow-up is useful.

AI Call Intelligence Loop

Connect enrichment to AI discovery scripts, qualification, post-call summaries, CRM updates, rep handoffs, and follow-up drafts.

Customer Expansion / Churn AgentIQ

Apply AgentIQ to existing customers by combining product usage, feature adoption, billing/support signals, customer growth, and external market context. Recommend CSM plays, expansion motions, save-play drafts, and manager escalations.

Slack Manager Command Layer

Let managers ask operational questions about drafts, follow-ups, Call outcomes, churn risk, rep capacity, market expansion, ICP discovery, and account redistribution.

Intelligent Playbooks

Use review pain, call outcomes, rep disposition, CS results, product adoption, billing signals, and conversion data to identify which sales and CS plays work by trade, segment, or market.

Example GTM Commands

With the same Salesforce-native intelligence layer in place, different GTM roles can ask operational questions and trigger approved workflows from Agentforce, Slack, or Salesforce.

Role	Interface	Example Ask	Contractor Intelligence Response
AE / Rep	AgentIQ or Agentforce	"Brief me on ABC Electrical before the demo. What did they care about?"	Summarizes trade, account context, prior Call/demo interest, likely pain points, objections, recommended demo path, and next best action.
Sales / Growth	Agentforce	"Find contractors in Austin pulling a high number of permits but showing weak documentation signals."	Ranks accounts by permit activity, trade, fit, and documentation gaps; creates a reviewable account list with pitch angles.
Marketing Ops	Salesforce or Slack	"Build a campaign cohort of roofers in counties affected by recent storms with review pain around communication."	Finds relevant accounts, groups them by signal, suggests messaging angles, and prepares a Salesforce campaign cohort for review.
PLG / Sales Assist	Agentforce	"Which new signups look like high-fit contractors and should get human follow-up?"	Scores inbound accounts using fit, usage, company context, and available enrichment, then recommends routing or onboarding tasks.
Manager	Slack	"Which reps have unreviewed drafts or high-priority accounts without follow-up?"	Returns rep-level workload, unreviewed drafts, overdue follow-ups, and accounts needing action.
Manager	Slack or Salesforce	"Adam is out today. Redistribute his high-priority accounts across the SDR team."	Checks open accounts, routing rules, ownership, and capacity, then recommends reassignment and updates tasks after approval.
CSM	AgentIQ	"This customer is adding more jobs but has low checklist/report	Summarizes adoption gaps, likely risk or expansion angle, recommended enablement play, and draft follow-up.

Role	Interface	Example Ask	Contractor Intelligence Response
		adoption. What should I do?"	
CS Leader	Slack	"Which customers are growing but under-adopting core features?"	Identifies accounts with rising project activity but low feature adoption, then recommends CSM or AE follow-up.
Billing / CS Workflow	Automated Agent Task	"Denied payment detected for an active customer with high project volume."	Drafts contextual recovery outreach, creates a CS task, flags account risk, and escalates if unresolved.
RevOps / Manager	Slack	"What markets show the strongest contractor pain around communication and project visibility?"	Summarizes review trends, trade segments, market opportunity, and recommended campaign focus.

The value is not just better answers. It is giving teams access to the right context, next action, and workflow inside the system they already use.

MVP Status + Production Hardening

Current MVP

- Agentforce action set
- Contractor search + enrichment
- Qualified Lead creation
- Draft outreach for human review
- Follow-up task creation
- AgentIQ Lead panel
- Durable Campaign Run context

Production hardening

- Named Credentials / API key governance
- Duplicate detection + matching rules
- Territory routing + assignment rules
- Logging, monitoring, retries
- Role-based permissions + field-level security

- Dashboards + campaign history
- Data Cloud / internal knowledge grounding
- Marketing automation handoff rules
- Call outcome + customer health data model
- Product usage + feature adoption signals
- Billing/payment risk signals
- Review intelligence + pain-point taxonomy
- Manager command layer permissions
- Playbook feedback loop + reporting

Closing

Contractor Intelligence is not meant to be another disconnected GTM tool. It is a working model for embedding AI into Salesforce-native revenue workflows: contractor signals become structured intelligence, Agentforce moves the process forward, Salesforce stores durable state, and reps, CSMs, and managers stay in control.

The MVP starts with contractor prospecting because it is a concrete way to prove the pattern. The larger opportunity is a contractor signal engine that connects public market research, internal customer data, AI call outcomes, product adoption, billing/support signals, and Salesforce workflows across new market motion, inbound/product-led conversion, customer expansion, churn prevention, and manager operations.
