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The Great Demo! Top Ten List

Here are ten steps you can take to improve the success rates for your demos:

1. Be clear on your **Objectives** for the demonstration.

"It's a *HUGE* opportunity" is *not* an objective… It's Hope – and Hope is not a strategy!

Why are you doing this demo? Is it Technical Proof or Vision Generation (or is this a "Harbor Tour")?

You – the selling team (sales and presales) – must know what you want to accomplish *before* you begin and plan your demo meeting with those objectives in mind – it's a Team Sport.

2. Reconfirm the **Meeting Objectives** and **Time Constraints** at the start of the meeting.

This apparent courtesy serves to manage surprises and help you stay in alignment with your customer.

How many times have you started a demo only to learn that you have only half the time you thought you had? How often has the customer brought a larger group of people than you expected?

Investing a few minutes at the beginning of the meeting to reconfirm the time constrains and review the customer's objectives can help you "rescue" a meeting otherwise headed for disaster!

"…What is your name, job title, and what would you like to accomplish in the meeting today…?"

3. Be clear on your **Customer's Needs**.

What are the Critical Business Issues, Goals or Objectives your customer wants to address?

Incredible as it may seem, your customer may not be as in love with your software as you are! They simply want to solve their business issues. If you don't know your customer's business issues, it may be *too early* for a demo.

Situation Slides are a surprisingly effective tool to determine if you are ready for a substantive demo:

Job Title and Industry:	For an individual – think in terms of one situation slide for each key player.
Critical Business Issue:	This person's top-level challenge – often best expressed as a quarterly, annual or project-based goal or objective that is at risk.
Problems/Reasons:	What makes it a problem today – what is making it hard to achieve the goal or objective – how are they doing things today, what is the impact?
Specific Capabilities:	What *specific* capabilities does the customer need to solve their problems, from the *customer's* perspective?
Delta:	The tangible value associated with making the change (customer's numbers).
Critical Date / V.R.E.:	A date by when the *customer* needs to have a solution in place (and why) / V.R.E. (Value Realization Event) – first success using the solution.

If one or more of these are missing or incomplete, you may want to do some Discovery before a demo. The lack of a Critical Business Issue, Delta and/or Critical Date may yield a dreaded "No Decision"!

Begin by reviewing your customer's situation, "Is this all correct? Has anything changed?"

4. **Show the "What" first**, then follow with the "How".

Illustrate what good things your offering can do to help the customer address their key issues as the first thing in the demo.

Once they see that your offering can help them, *then* you can reveal how the capabilities in your offering accomplish this. If you spend 30 or 40 (or 50 or…) minutes telling a loooong story to get to a final "pay-off" screen, you may find your audience has "checked-out" – and that the key people have left before you reach the big benefit message.

Illustrate for your customer what business problems your tools will help them address – right up-front. Your customer will become engaged right away and will drive the demo forward.

5. Show only the **Specific Capabilities** needed to address the customer's problems.

This is not product training; it is a critical step in the sales and buying processes.

Avoid packing too much into the demo – focus on the Specific Capabilities your customer needs to see. Avoid using "If", "Or" and "Also" in the early stages of a demo – you'll be taking *yourself* into the weeds…! Avoid showing "Set-up Mode" items too early (or at all, in many cases).

Sales have been lost because “the software looked too complicated” in the eyes of the customer.

6. Use the **Fewest Number of Clicks** in *every* pathway – just “Do It”.

Customers want to see the fastest way to complete their work.

They cannot discriminate the options from the direct pathway. The more options you show, the more choices you present, the more confused your audience gets – making your software look hard to use.

“…Every click you make, every tap you take…” – your audience is watching you…!

7. **Peel Back** your capabilities in layers, in accord with the customer’s level of interest.

Enable a two-way, bidirectional *conversation* with your audience.

Instead of pre-answering questions (also known as “premature elaboration”), let your *customer* ask the questions to drive the demo forward.

Your demo is going *perfectly* when your audience is asking the questions you *want* them to be asking…!

8. Use the **“Inverted Pyramid”** structure and organize in **Chunks**.

Leverage how news articles organize and present information in the Inverted Pyramid format – and apply this to your demos.

Inverted Pyramid articles start with the most important ideas at the top, followed by the next most important information, then down further and further into the details. Readers explore as deep as they desire, and then, once satisfied, they move on to the next article. And like newspapers and news articles on the web, you can organize your demo into “chunks”.

Each major topic can be introduced with an Illustration, proven rapidly with a “Do It” pathway, then Peel Back the Layers as far as necessary – with a summary at the end of each “chunk”.

9. Manage **“Good” Questions**.

Avoid the weeds…!

Answer Great Questions right away – they move your demo forward and underscore your offering’s value. Park Good Questions (and Stupid Questions) that will take you off track and into the weeds. Use a “Parking Lot” and address them during Q&A or later on in the demo.

Good questions represent one of the greatest risks to an otherwise well-prepared demonstration.

10. Manage your **Delivery**.

"You said, you said, you said…"; "You would click here"; "You would see this screen…"

Stay in "You" mode. With SaaS software today it is even more important to be clear that it will be your *customer* using the tools to solve their problems.

Stay in alignment with your audience's level, interests, and vocabulary. Executives, Middle Managers, Staffers and System Admins typically have different sets of needs – and want to see deliverables and workflows that are in accord with their expected use of the tools.

Map your pace and language according to locale, technical acumen, etc. Avoid using your organization's jargon and avoid using non-local colloquialisms. Be human and inject humor as appropriate; be as passionate, compelling and remarkable as possible!

Use compelling stories to support key take-aways, to make them "sticky" and memorable.

11. (Bonus!) Manage your **Demo Environment**.

Make and use a checklist – that bad thing should happen only *once*, if it is under your control!

Ensure that your equipment, software, and materials are ready to go before you demo. When preparing your demo environment, make everything look as real as possible. No fake names; no use of "demo" or "test"; no unbelievable timelines or data.

Include realistic problems, exceptions and opportunities that can be surfaced and addressed.

Follow these "Top Ten" guidelines to increase your probability of success with your demos. When you do these ten simple things, you should expect your audience to say, "Wow! That was a Great Demo!"

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