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Stunningly Awful On-Boarding Demos – The Trouble Begins

"Learn the demo…" the group of newly hired presales folks are told, "and when you think you're ready, we'll have you present the demo back to us. If you do well, you'll be certified and ready to start presenting to customers." What's wrong with this picture?

It's a terrific approach if all customers are exactly the same – otherwise, it forces the tyranny of a one-size-fits-all demo upon a broad range of customers, ignoring the specifics of their situations.

Would one size and style of shoe fit all feet? ("Gentlemen, I invite you to contemplate your shoe: a women's faux suede leopard skin 6 inch heel size 6 pump…") [1]

Would one dining choice fulfill all appetites? ("Folks, our offering tonight is lightly larded lima beans in a spinach puree…") [2]

Clearly not! But wait, there's more…

Nine Months Pass…

And now our team, having delivered dozens of demos, becomes very comfortable with presenting – so much so, in fact, that they begin to ignore the customer.

True story – I didn't need to be at my laptop for this demo:

> It was delivered to me over the web, via WebEx. The presenter talked, pointed and clicked for 1.25 hours without *ever* checking in with me! I truly didn't need to be at my laptop – he was just fine going through his talk-track by himself.
>
> In fact, during the session his voice cut out – twice –and both times after *several* long minutes I finally had to use "Chat" to let him know I could no longer hear him…! He never checked in to get my response, he never engaged me in a conversation; he didn't even ask if I had caught up on my email (I did).

We are victims of momentum – we do the same things the same way unless someone gives us a shove in a new direction. [~97.5% of us resists change – Evert Rogers.]

Deconstruct – And Reconstruct

Is it OK to learn the standard demo? Certainly, but be prepared to use it as a starting point – one example of what could be many demos…

So does that mean that you have to learn dozens of demos, one for each customer situation? Possibly, but that's a rather tough course to take.

Here's an alternative: think in terms of *deconstructing* your standard, end-to-end, day-in-the-life demo into component pieces – "chunks" – and then reassemble these component chunks *as needed* to fit each specific customer situation you face.

[Many software vendors present this same idea as *configuration* vs. *customizatio*n, where configuration is the process of assembling a solution from pre-built components that then *appear* to be customized for specific customer requirements, rather than coding each specific solution individually (and potentially painfully for all parties involved!).]

For example, contemplate a standard CRM system demo, which might consist of the following (which I am NOT advocating as a good sales process or a plan for a demo!):

1. System admin and set-up options
2. Enter a new record as a lead
3. Include in marketing campaign
4. Track responses to campaigns
5. First call with inside sales
6. Promote to qualified lead, pass to field sales
7. Call with field sales person
8. Schedule demo
9. Send proposal
10. In negotiation
11. Close sale
12. Include in upsell/cross-sell marketing campaigns
13. Roll up quarterly forecast and 6-month pipeline
14. Dashboard and report creation and editing
15. Dashboards and reporting (forecast, pipeline, key opportunities, campaigns)

A traditional demo would walk the customer through each of these steps, generally consuming the full amount of time allocated for the demo. The example above could easily take an hour of more – and presenters often run out of time before being able to present the reporting capabilities.

This means that the most important people (e.g., the Head of Sales), won't see what is most important to him/her until the very end of the demo (if he/she is still present in the room!).

Very Scary – And Liberating

Now consider the following job titles and select the chunks relevant to each:

System Administrator:
Inside Sales Person:
Field Sales Person:
Marketing Manager:
Head of Sales:

Here's one set of slice-n-dice reconstructions of the chunks that map to the specific interests for each job title (how did yours compare?):

System Administrator: 1-15
Inside Sales Person: 2, 4-6
Field Sales Person: 6-11
Marketing Manager: 3, 4, 12, 14, 15
Head of Sales: 15 and maybe 14

There is likely only one person who is really interested in all 15 steps – which one? The System Administrator, who also likely has the *least* impact in the decision-making process.

If you are presenting to the Head of Sales, your demo (chunk 15 and perhaps 14) might only take a few minutes. Does he/she want or need to see the other chunks? Nope, not necessarily.

[You can always *ask*, of course, but be prepared for the Head of Sales to say something delightful such as, "No, I'm good – I've seen what I wanted to see and this looks like what we need. I have another meeting to go to; the rest of you can stay and torture the vendor as long as you wish…!"]

Why is this both very scary and liberating? Because it requires us to *think*! It's liberating because it frees us from the tyranny (and boredom) of presenting the same one-size-fits-all demo over and over and over. It's scary because, yes, it requires us to *think* and reconstruct our demos in accord with the specific interests of our audiences.

The Standard Demo Revisited

One simple (and rapid) way to put this deconstruct/reconstruct principle into practice is to teach new-hires to apply it to the standard demo for their certification sessions.

When preparing for the certification, have your new folks break the standard demo into chunks and organize those chunks in accord with the job titles the certification team is modeling. They get bonus points, of course, for “Doing the Last Thing First” for each chunk. Each chunk should likely be about 3-4 minutes in length, for most software.

A colleague pointed out to me that habits are established very early in an on-boarding process, so the earlier we teach new team members to deconstruct/reconstruct the standard demo, the sooner they will apply these new habits with customers!

New Directions – Boldly Exploring

Overall, one objective of on-boarding demo training should include collecting and learning to deploy a set of demo chunks – stand-alone portions of demos that represent high-probability use-cases, workflows, and deliverables.

Here are a few ideas to help broaden perspective and begin to collect these chunks…

[A colleague of mine phrased this as, “Your five-year mission: to explore strange new demos, to seek out new demo chunks and deliverables, to boldly demo where no man has demoed before!”].

Go sit with a few of your *current* (happy) customers and see how they use your offerings today. You might consider a structured approach to meeting with these customers and use a format such as:

- Job Title/Industry: For each individual you interview…
- Critical Business Issue: What top level goal or objective was at risk?
- Problems/Reasons: What did they have in place before; what were the "pain" points, what was taking too long, too many people, was too hard, etc.?
- Specific Capabilities: What capabilities, in particular, was this person looking for as a solution? What workflows, what reports, what deliverables? These represent likely demo chunks for this job title.
- Delta: What was the value of making the change (best expressed as a tangible number)?
- Critical Date: Was there a date or event that drove a need to have a solution place?

Collect these for a series of individual job titles – and very rapidly you'll have a set of chunks you can draw from – chunks that will likely resonate with prospects that have similar job titles and situations.

Let Your Customer Do the Demo

Here’s a wonderful approach: ask your existing customers to demo to you! Ask them how they are using your software today:

- What workflows?
- What outputs and deliverables?
- What do they really find terrific?

You’ll typically learn two sets of scenarios when you apply the approach:

- Set 1: Your customer shows you workflows and deliverables that you *expected* them to use. That's good – and each piece that you see represents a chunk that you can add to your collection.

- Set 2: Your customer shows you workflows and deliverables that you *had no idea* customers might use. That's truly terrific! Now you have some new, never-before-seen chunks to reuse. You can harvest these success stories and share them with your team and, as appropriate, with other customers.

Along similar lines, attend and/or watch recordings of customers' User Group Meeting presentations and demos – fabulous!

Learn From (Some of) the Best

There are likely a number of seasoned, well-respected – and most important – high-in-demand presales folks in your organization. They may offer a rich resource for demo chunks proven to be successful. Contemplate doing "ride-alongs" with these people, either in person and/or over the web.

Other Vendors' Demos

Watching demos from other vendors is a terrific way to regain a customer's perspective. I suggest that you watch demos from vendors where you actually have an interest in their products – this helps to make the interaction as real as possible – *be* a customer.

Sign up for a demo from the vendor's website and see how you are treated as a customer: Did they just schedule a demo without asking any questions or doing Discovery? Was "Discovery" simply a set of 3-4 quick questions – and the presenter couldn't *wait* to dive into the demo?

How about the demo itself:

- Was it engaging?
- Did it address your interests? Did they present just the chunks you were interested in or an entire, standard, end-to-end, day-in-the-life, kill-me-now demo?
- Was it interactive – or was it a furious fire-hose delivery of flying features and functions flung frantically? Frankly frightening,
- Did you find your attention wandering – did you "check out"? (And if so, how long did it take? Were you able to catch up on your email during the demo?)
- What could have made the experience for valuable for you, as the customer?

You may wish to apply what you learned to your own demos and processes!

[I'm occasionally surprised to find presales and sales staff who have *never* seen another vendor's demo – not even demos from a competitor… So, if you haven't seen demos from other vendors, it is time to do so!]

Configure and Customize

Habits are often established during the on-boarding process – and can become the norm for years following after. The earlier that new hires are taught to deconstruct standard demos into component pieces – chunks – and to learn how to reconstruct and reassemble those chunks to meet specific customer situations, the better.

There is nothing inherently wrong with the standard demo or certification process. But use it as a starting point – collect and create a library of demo chunks that you can draw from and assemble demos for specific job titles and situations. Having a library of demo chunks enables you to configure your demos from pre-built pieces, while giving your customers the impression that you have painstakingly customized the demo just for them!

[1] Actually exists – Amazon.com "Ollio Women's Shoe High Heel Platform Faux Suede Multi Color Pump".
[2] Made this one up…

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