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Stunningly Awful Demos: Waaay Out of Alignment

I'm often surprised at how traditional demos are organized – they seem to focus on the least important items for the target audience. Contemplate the following scenario:

You are presenting a demonstration of your fabulous business intelligence tool to a mixed audience that includes:
- Executives
- Middle Managers
- Business Analysts/Staffers
- "Super-User"/"Power-User" Business Analysts
- IT

Traditional BI demos often start with a blank screen and show how to build a wonderfully rich dashboard or visualization, followed by building another again from scratch, followed by drilling down, slicing, dicing and generally messing around with the visualization and the underlying data – but without much purpose towards solving any business problems.

Who does this appeal to? Likely only the Super-Users/Power-Users, who are interested in seeing how easy or hard it is to build visualizations[1].

Meanwhile…
- The Executives are thinking, "This is going nowhere; I've got another meeting I need to attend – I'm outta here…!"
- The Middle Managers are thinking, "This is going nowhere; furthermore it looks like this is a very complicated tool that only an expert could use – we'll only need a few seats at maximum if we license this stuff…"
- The Business Analysts/Staffers are thinking, "Oh my God, this looks waaay too complicated for me to use…"
- And IT is thinking, "How much bandwidth is this going to consume on our network – it looks like a real hog with all that data moving around…"

The result? Fail.

The impact? More demos, extended sales cycles, smaller initial licenses, increased difficulty in achieving "Expansion" after an initial "Landing"; general whining, moaning, and gnashing of teeth.

Use Modes

Contemplate the following use modes:

[1] If these folks *are* the decision-makers, then you are OK for an initial, small implementation… On the other hand, if they are *not* the decision-makers, then the trouble has just begun!

1. Set-up Mode – stuff you do once
2. Daily Use Mode – stuff you do often (daily, for example)

Now contemplate the following for a typical dashboard or visualization:

1. How often does one set up a dashboard or visualization? Once, typically.
2. How often does one *consume* the information in a dashboard or visualization? It might be daily, weekly, monthly, etc. – many times a year, in any case.

Traditional demos tend to spend an enormous amount of time showing Set-up Mode – and surprisingly little time showing Daily Use Mode. When we contemplate each of our audience job titles again, with respect to their modes of use, we'll see that these traditional demos are generally waaaay out of alignment with their audiences' interests:

- Executives: Are *always* in Daily Use Mode – never in Set-up Mode
- Middle Managers: Are *nearly* always in Daily Use Mode – rarely in Set-up Mode
- Business Analysts/Staffers: Are largely in Daily Use Mode – and only occasionally in Set-up Mode
- Super-User/Power-User Business Analysts: Live mostly in Set-up Mode
- IT: Are still wondering about bandwidth issues (pre-Set-up Mode)

If the decision-makers are Executives or Middle-Managers, you can see why the end result of these demos are "fails".

Alignment

So, if we want to be in good alignment with these folks, here's a recommended strategy for this demo:

- Executives: Start with the Executives, show a few terrific visualizations/dashboards, explaining what business problems they help address – Daily-Use Mode. Summarize.

- Middle Managers: Next in line, again show a few relevant visualizations, again explaining the business problems they help solve – and a *bit* about how to drill-down to find more detail. Summarize.

- Business Analysts/Staffers: Next up, show how they can answer the questions coming from their managers – specifically how to drill-down to find root-causes, anomalies, specific patterns and relationships, etc. – use the *fewest* number of steps to address each scenario. *Ask* if they are interested in seeing how to *modify* an existing visualization. Summarize.

- Super-User/Power-User Business Analysts: Now it is their turn, start with a completed visualization, then show how to modify it; *then* show how to build it from scratch. Summarize.

- IT: Address any unanswered questions on implementation, access rights, single-sign-on and, of course, bandwidth. Summarize.

A Subtlety…

There's another, more subtle mode to consider, as well: Collaboration Mode.

It is comparatively rare that people work alone, in a vacuum. A Middle Manager might want a new visualization to track a particular process and its KPI's – but she isn't likely to create it herself. She'll contact a Power-User and ask him to generate the visualization – which she'll likely need to have edited and tuned before she puts it into day-to-day use.

The old way of doing this was a slow, serial approach. The Middle Manager described what she wanted and the Power-User went away and built something; they then came together a few days later to discuss. After some questions and comments back and forth, the Power-User went back to his cube to make some changes (sometimes major changes) and ran version 2.0 by the Manager – and this process was repeated as necessary until done.

Now, both parties can come together (either face-to-face or over the web, using tools like WebEx and GoToMeeting). The Manager describes what she needs; the Power-User then shows a few *completed* example visualizations and describes what is possible – he may show how a few changes can be made – to give the Manager a vision of what her visualization might look like. [Note: the astute will realize that this is, in effect, a Vision Generation demo…]

They then work *together* to create the visualization desired. You might expect portions of the conversation to sound like:

MM: "OK, can I get a view of the U.S. and map the sales data to each state?"
PU: "Sure, let me drag that out… Do you want the data as numbers or in mini-charts for each state?"
MM: "Wow, show me a few mini-charts – and could you have the total revenue as a single bigger number for each state as well?"
PM: "Yes – here, I just added it. Now, what level of detail would you like for the sales figures and pipelines for each state and region – we can place another graphic on your dashboard and break that information out separately…"
MM: "Cool – can you show me an example?"

Collaboration Mode is a wonderful thing – it is the confluence of Daily-Use and Set-up Modes.

A Further Subtlety…

Most managers today operate in two (additional) modes:

1. Things are going just fine…
2. There's a problem or anomaly I need to address.

These modes map to Standard Reports vs. Alerts and Exceptions.

A Standard Report is something that generally is received on a regular basis and is used to track progress. A simple example is a weekly forecast – e.g., delivered automatically each Monday to the VP of sales and the Regional Sales Managers – so that they can assess their progress towards achieving their quotas.

These reports are rapidly consumed and reviewed – and if everything looks fine they are filed or deleted. If there is a problem – "looks like forecast revenues for the Southeast are way below expectations…" – then additional (and often separate) action may be taken. "Let's look at the detail for the Southeast deals this quarter and the current pipeline – what are the bigger deals and which ones are at risk?"

Most managers implicitly assign higher value to Alerts and Exceptions – this is where they need to step in and take action. Standard Reports are good; reports and vehicles that show Alerts and Exceptions are better!

But Wait There's More…

Most demos remain entirely within the vendor's software. This is simply *not* real-life – nearly no-one spends their day working our software (unless your software is Outlook or Google Mail…).

The sad truth is that most users do *not* live in our software, in spite of our fervent desires. Where do they spend their time? That's right,

1. In their email tool and
2. In a browser.

So, with that in mind, why not map Daily-use Mode to the tools people are most likely using?

Contemplate showing Daily Use Mode by *starting* in email and showing an unopened message – you double-click on that message to open it, showing a link to the desired weekly report. Clicking the link, the report opens in a browser window… Daily Use Mode for a Standard Report.

Similarly, start in your email tool and again show an unopened message – double-clicking shows an alert, "Pipeline Exception – Low Lead Generation for Southeast" – clicking on the link brings up a Pipeline Detail View visualization in a browser window… Daily Use Mode for an Alert/Exception!

Ahhhh – Alignment

Aligning the likely mode of use with the corresponding job title yields surprisingly compelling and successful demos. It's not rocket science; it's just common sense!

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