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The Role of Sales in Great Demos

Regarding the role of sales in demos, here's what NOT to do:

1. Nothing.
2. Way too much.

Let me elaborate...

Sales people have a specific and carefully choreographed role in demos when following the Great Demo! methodology. Here are some of the key ideas for face-to-face demos:

0. Before the demo: ensure that sufficient Discovery information has been uncovered and communicated to the balance of the team (e.g., presales person), along with the other pre-demo information on players, timing, location, etc.
1. Introductions: Sales should ask the Three Questions (What is your name? What is your job title? What would you like to accomplish in our demo today?).
2. Situation Slides: Sales should present the Situation Slide(s). [For those unfamiliar with Situation Slides or Illustrations, see my note way below...]
3. Illustrations: Not required, but highly recommended – the best sales people can competently (and confidently) present Illustrations. This also enables them to deliver Vision Generation demos, as well (*without* the need for a presales person to be present). See my article “Vision Generation Demos - The Crisp Cure for Stunningly Awful Harbor Tours” on my website at www.secondderivative.com/vision-generation-demos.html for more information.
4. Questions: Sales should field and park questions, as appropriate. (Sales people should also be tracking what was asked and answered, so that they can be properly prepared for the Final Summary). Sales may also need to gently step in and ask clarification questions, before the technical person heads off into the weeds...
5. Intermediate Summaries: Sales should be ready to deliver summaries after each major “chunk”, if the presales person does not. Doing so also gives the presales person a breather!
6. Business Value: Far too often, demo presenters discuss “what” their software does and elaborate on “how” it works, but neglect to communicate “why” it is important – they miss communicating the Business Value. Sales needs to include this key idea in summaries.
7. Rescues: Sales should be prepared to “rescue” the presales person, when needed (e.g., bugs, crashes, getting “lost in the weeds”, parking questions, etc.).

8. Final Summary: The sales person should deliver the final summary, including a review of the questions asked, answers provided, and any action items to be pursued (for both the vendor and the customer). If appropriate, this may include a gentle trial close...

Delivering demos should be perceived as a “team sport” when two or more people are involved on the vendor’s side. These players will typically include a sales person (in ultimate control *and* with the ultimate responsibility for preparation and success of the demo) and one or more technical players, generally the person most likely to “drive” the software (often someone with a presales title; sometimes a marketing person). Discover, communicate, plan, prep and deliver!

For comparison (and amusement), here is a longer list of what NOT to do:

0. Before the demo: communicate little or no information to the balance of the team (e.g., the presales person). Just say, “Show them the standard demo...”
 1. Detailed introductions of the vendor’s team, but nothing about the customer.
 2. Any corporate overview presentation that is longer than 1 slide or 1 minute.
 3. Sitting in the back of the room, doing email or texting – or leaving to make calls.
 4. Telling the presales person to show “that really cool thing...”.
 5. Piling on (adding an additional answer to every question already answered by someone else). For a really amusing experience, get two sales people who naturally “pile on” in a demo and watch them try to out-do the other. Great fun, if you have no desire to win the business...

OK, but what about when the sales person is at the customer site, face-to-face, and the presales/technical person is operating via the web, using WebEx/GoToMeeting or similar tool?

Sales needs to be the eyes for the remote person; sales needs to be an “active conduit” of information, providing insight into what is happening in the meeting room back to the remote demonstrator. See my article “Remote Demos – The Role of the Active Conduit” on my website at www.secondderivative.com/active-conduit.html for details on this best practice.

So, regarding the role of sales in demos, do *just enough* (and do it well) – it’s a team sport!

Note From Way Above:

- Situation Slides are crisp summaries of a customer’s, well, situation. They are a concise way to capture and communicate the key elements of Discovery information needed to prepare and deliver a Great Demo!
- Illustrations are representative visuals, typically screens from your software, that quickly, well, illustrate “what” good things your software can do for your customer. They are the screens that typically cause your customer to sit up in their chairs and say, “Wow – I gotta get me some of that!”.

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