



## The Second Derivative

1532 Scenic Drive  
Trinidad, CA 95570  
Phone: +1 650 631 3694  
[PCohan@SecondDerivative.com](mailto:PCohan@SecondDerivative.com)  
[www.SecondDerivative.com](http://www.SecondDerivative.com)

Peter E. Cohan, Principal

### Surprisingly Successful Complex Situation Demos

Have you ever had a demo where multiple customer players wanted to see multiple solutions? Did you ever feel like the demo appeared complicated or confusing? Would you like a cleaner, more effective approach?

Break your demo into “chunks” – bite-size pieces.

But before we go into detail, a couple of comments about what *not* to do:

1. Don't do “A-Day-in-the-Life” – they really don't work (see my [article](#) on this for explanation).
2. Don't try to embrace the needs of multiple players in a one piece – you'll end up with what appears to the customer to be an colossal bowl of demo spaghetti (or Gordian Knot) – yielding a terribly tortured noodle journey of confusing back-and-forths, loops, cul-de-sacs, dead-ends and parallel paths, with abuses to natural timelines that would perplex a physicist... It is like trying to eat a mammoth bowl of spaghetti in a single bite!

Instead, let's apply a structured approach...

**Note: “GD!”** identifies elements specifically for Great Demo! practitioners – those who have enjoyed (or survived!) a Great Demo! Workshop, experienced a Seminar, or read the book – introducing when and how to apply Situation Slides, Illustrations and other Great Demo! methodology components.

**Second Note:** For those who have *not* been exposed to Great Demo!, there is still a great deal you will gain from this article, in spite of your \*ahem\* insufficient education...

### Four Constituencies

Let's say we have four sets of job titles in our upcoming demo:

1. Executives
2. Middle Managers
3. End-users
4. Software Administrators

The traditional approach endeavors to move swiftly from one group to another, weaving in and out, strand crossing strand, twisting around the occasional meatball: “Now, remember this from earlier? We now pick this up, approve it, and pass it along to...” This produces the massive, confusingly intertwined bowl of demo spaghetti in the what *not* to do, above.

Instead, let's break things into initial chunks based on job title – we'll essentially do 4 separate demos, one for each – and we'll start with the most important folks first: the Executives.

We'll present a demo specifically tailored to the Executives' situation and interests – nothing else. We address the Execs' questions, summarize and wrap-up. Done and satisfied.

[Extra credit note: at this point an Exec may likely say, "Folks, this looks good..." He glances at his watch and adds, "I've got another meeting to attend – but I'm comfortable moving forward with this solution for us..." Congratulations – the deal is yours...!]

Once the Executives are satisfied and have seen what they want, we'll move on to the next group: the Middle Managers.

We then deliver a demo customized for the Middle Managers only. Similarly manage and address their questions, summarize and wrap-up for them.

Who's next? The End-users. The next demo is theirs – and again is crafted for their explicit needs. Once the End-users are satisfied, we turn our attention to the Administrators and address their interests with an Administrator-specific demo.

That's the initial set of chunks – organize in accord with job title, with the highest ranking people addressed first. You've untangled that bowl of demo spaghetti into a set of parallel strands – much easier to present and consume.

## **Depth and Breadth**

Now, how much does each constituency need to see? Just enough...!

Executives only need to see the portions, typically, that are relevant for them – most often this will be high-level reporting: "I need visibility – show me how I'm performing against my objectives [metrics/KPI's/etc.] – show me any issues I need to address, exceptions, challenges, opportunities..."

**GD!** This is where "Do the Last Thing First" is most effective. Sharing a few compelling Illustrations (key screens or reports) may be all that is needed for the Execs. Interestingly, when applying this approach, *you may never need to go into the live software...!* With an engaging Illustration on the screen, they'll typically start asking questions – most of which can likely be answered verbally.

So how long and how deep are the chunks for the Executives? Short and shallow. Bite-size.

OK, who's next?

Middle Managers. And how much do they need to see? Likely a bit more than the Execs, but equally likely they'll also want to start with dashboards and reports – and will typically want to drill down to find more detail.

**GD!** "Do the Last Thing First", then "Do It" (fewest number of mouse clicks from a logical starting point to navigate to the Illustration), followed most typically by questions (you are now "Peeling Back the Layers" for them).

They'll ask about how to assign tasks to team members and track progress, whether alerts can be set up, how to slice/dice data and related.

Accordingly, how long and how deep are the Middle Managers' chunks? A bit longer and deeper than the Execs (but much shorter than our next group) – simply a series of satisfying slurps.

Who's after the Middle Managers?

Yep – the End-users. At this point the End-users have seen the demos for the Execs and the Middle Managers and are likely thinking, "Looks like we're going to have to *use* this software – what's it going to be like for us...?"

End-users will want to see the workflows they'll have to execute. "How hard is it? Does it do what I need? How does it compare with my current practice? What's in this for me?"

**GD!** Again, Great Demo! methodology applies neatly:

- "Do the Last Thing First" for each workflow – show them where it is going – the end result – right up front. Note: this means addressing each workflow as its own chunk (consider it a course of small plates...).
- Drive the workflow – "Do It" – using the fewest number of clicks. No "if", no "or", no "also" at this point – just the shortest pathway to get the process done.
- Now the End-users will ask questions, "Can it do this? How do I do that? Is there a way to \_\_\_?" You are "Peeling Back the Layers" in accord with their depth and level of interest.
- Manage questions that need to be addressed later by "Parking" them.
- Summarize at the end.

End-user chunks will likely be longer and deeper than Middle Managers – and that makes sense, since they really want to see their workflows and processes reflected in the software. They are hungrier.

Finally, who's left?

Software Administrators. And what do they want to see? "How do I set up the system? Add/remove users? Assign privileges? Build or edit reports and dashboards?" Most of these tasks are part of "Set-up Mode" (see my [article](#) on this...) – and are generally topics that *only* the Admins care about.

Their chunks are often very narrow, but deep. (Similar to digging for those delicious chocolate chunks in containers of ice-cream).

**GD!** Apply Great Demo! again:

- "Do the Last Thing First" for each item – show the end result for each task up front.
- "Do It" – show how to get the task done with the fewest number of clicks.
- "Peel Back the Layers" as they ask specific questions; manage and "Park" as necessary.
- Summarize.

There you have it – four separate demos, delivered in accord with the most important people being addressed first, and so on down the line. Your convoluted bowl of spaghetti has been transformed into a four-course meal – beautiful!

## Let's Get Organized

How can we let the customer know our plan for the demo? Create and present an agenda (it's the menu for our four-course fixed-price dinner):

For our four-constituents scenario, our agenda might look like:

- Introductions and Review of Agenda
- Executives' Demo
- Middle Managers' Demo
- End-users' Demo
- Administrators' Demo
- Summary and Next Steps

Presenting this at the beginning of the session aligns everyone to the plan and lets everyone know when their portion will take place (or be served).

## But Wait – What If There's More?

How do we apply these ideas when several of the groups have more than one workflow or problem area – and/or separate software tools are needed? Bite-size chunks, again. Here's an example agenda for a more complex scenario:

- Introductions and Review of Agenda
- Executives' Demo
- Middle Managers' Demo
  - Scenario 1
  - Scenario 2
- End-users' Demo
  - Workflow 1
  - Workflow 2
  - Workflow 3
- Administrators' Demo
  - System Set-up
  - Dashboard/Report Building
- Summary and Next Steps

We've taken an overflowing tureen of pasta and plated it neatly for easy presentation and consumption.

**GD!** And how do we map this directly to the Great Demo! approach? As follows – let's define some abbreviations:

SS = Situation Slide  
IL = Illustration  
DI = Do It  
PB = Peel Back the Layers  
Sum = Summarize

**GD!** We can now build our Great Demo! plan for the overall session:

- Introductions and Review of Agenda
- Executives' Demo [SS, IL, (DI, PB if needed), Sum]
- Middle Managers' Demo
  - Scenario 1 [SS, IL, DI, PB, Sum]
  - Scenario 2 [SS, IL, DI, PB, Sum]
- End-users' Demo
  - Workflow 1 [SS, IL, DI, PB, Sum]
  - Workflow 2 [SS, IL, DI, PB, Sum]
  - Workflow 3 [SS, IL, DI, PB, Sum]
- Administrators' Demo
  - System Set-up [SS, IL, DI, PB, Sum]
  - Dashboard/Report Building [SS, IL, DI, PB, Sum]
- Summary and Next Steps

You can use this structure to organize and manage demos that might last two hours – or two days...!

Bonus idea: Return to your agenda at the close of each group's demo. This will help remind you to summarize and set the stage for the next group.

You can also use checks or tick marks to indicate which segments have been completed and which are next in line. In this example, below, we've just finished with our Middle Managers and are about to move on to the End-users:

- Introductions and Review of Agenda
- Executives' Demo
- Middle Managers' Demo
  - ✓ Scenario 1
  - ✓ Scenario 2
- End-users' Demo
  - Workflow 1
  - Workflow 2
  - Workflow 3
- Administrators' Demo
  - System Set-up
  - Dashboard/Report Building
- Summary and Next Steps

Very professional; very effective! (And delicious, I might add).

### **Could It Get More Complex? But of Course...**

What if you have disparate groups from multiple departments, with a range of varying job titles – who should go first? There is no specific set of tactics to employ in these more complex situations, but here are a few overarching strategies:

- As possible, you may want to try to split the overall customer team into a series of separate demos, for example by department. This will help reduce the overall time any individual invests in the demo meeting and decrease potential confusion.
- Otherwise, always start with the highest ranking people. Ask your Champion for guidance, if unclear of customer internal structures and politics.
- For the next level down, contemplate organizing by department or workflow to minimize the risk of “jumping around” in your demo.

## **GD! An Elegant Alternative**

For more advanced Great Demo! practitioners, we suggest using “Teasers” – sharing the main Illustrations for each sub-demo in a segment at the beginning.

This follows the same idea as the “Tonight’s top stories...” segment on the evening news – they “tease” us with a bit of the main stories to capture our interest and (gently) force us to wait for the balance of the narrative...

We can apply the same idea to complex demo situations by sharing an abbreviated (or quickly verbalized) Situation Slide followed by a compelling Illustration for each main scenario or topic. The resulting structure looks like this (with “AS” = Abbreviated Situation Slide):

- Introductions and Review of Agenda
- Overview of the Solutions [Execs AS, IL; Managers AS, IL; Users AS, IL; Admin AS, IL]
- Executives’ Demo [SS, IL, (DI, PB if needed), Sum]
- Middle Managers’ Demo
  - Scenario 1 [SS, IL, DI, PB, Sum]
  - Scenario 2 [SS, IL, DI, PB, Sum]
- End-users’ Demo
  - Workflow 1 [SS, IL, DI, PB, Sum]
  - Workflow 2 [SS, IL, DI, PB, Sum]
  - Workflow 3 [SS, IL, DI, PB, Sum]
- Administrators’ Demo
  - System Set-up [SS, IL, DI, PB, Sum]
  - Dashboard/Report Building [SS, IL, DI, PB, Sum]
- Summary and Next Steps

There you have it – how to turn a complex, complicated, long, tortured spaghetti basin of a demo into a delightfully structured set of well-organized slices. Enjoy your meal!

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