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Stunningly Awful Demo Situations
–
The Horror of Scripted Demos

"Here's the script you need to follow for the demo next week," says the consultant for the customer, "and you are not allowed to talk with the customer beforehand."

A recipe for failure? Likely. An immense consumption of resources along the way, anyway? Equally likely. Frustrating? Yes, indeed.

What can be done to increase success rates when dealing with scripted demo situations? Here are few ideas that may yield improvements in your close rate…

Basic Principles

There are a few key concepts to keep in mind, right from the beginning:

1. You want to win the business.

   Rather obvious.

2. Your customer wants a solution that fits best, with the best possible economics and (typically) implemented into production use in the shortest possible time.

   Again, rather obvious, but it is always helpful to keep the customer's objectives in mind.

3. The customer's consultant wants to "win", as well.

   This is the one player we often neglect, with respect to *his* objectives. The consultant (if involved – and they often are) has his own needs with respect to the engagement. Focusing sufficient attention to enable the consultant's success may help *you* win the order.

We generally visualize the customer's consultant as an annoyance, a challenge, and a problem. The consultant won't give us access to the customer; he won't provide any additional information; and any deviations from his process may result in immediate disqualification. He is as implacable and immovable as a glacier (prior to global warming).

However, what if we (carefully) cultivate the consultant? What if we invest a little effort to help him be successful? What advantages might this provide to us?

Clearly, a consultant will favor vendors that make his job easier, provide him with future business, and help him increase his own earnings. Similarly, consultants will view vendors negatively who seek to go around him or cut him out of the process. Providing consultants with tools, help, and respect can make an enormous difference in your probability of success – both for the current situation and for future situations.

This concept takes us to suggestion number one…

1. Be First:

   Being "number one" in the list of possible vendors generally provides enormous advantages and opportunities. You may have the ability to:

   - Bias the entire list of requirements in your favor.
   - Bias the order of the requirements – and the resulting scripted demo – in your favor so that your product's workflows and processes appear smooth and logical (and your competition's look malformed and incomplete).
   - Bias the degree of proof required for various capabilities, again such that your offering shines and the competitions' suffers.

   How can you be first?

   Being the market leader often affords this advantage. If you are the market leader, leverage that status! Preempt the requirements listing process by providing a "market standard" listing free to all customers and consultants. Many consultants will use your list as a starting point, providing the consultant with way to jump-start their own process – and a head-start on their deliverable.

   Publish success stories which similarly include a listing of the capabilities consumed by your existing customers. Provide this list in a format that is easily consumed and edited by prospects and consultants. Success stories are extremely effective in biasing towards your capabilities and strengths. Again, these represent an advantageous starting point for consultants, making their job easier and enabling consultant deliverables of higher value to the *consultants'* customers.

   Contemplate sanitizing and publishing RFP templates where you have won business previously. (Don't compromise confidential information, but you can certainly create an aggregated or normalized RFP template that reflects your strengths). Provide these templates to prospects and consultants for their use as well.

   Being first means enormous opportunities to bias the entire process in your favor. Now, here are other strategies you can employ, whether or not you are "first"…

2. Ask for a Conversation with the Customer:

   Your objective here is to gain a clear, first-hand understanding of the customer's situation. The qualification and workflow information you gain in meeting with the customer can be critical (it is critical). However, very often your path to the customer is blocked by the customer or consultant's process – they won't allow any contact or very limited contact.

   If they won't allow *any* contact with the customer, then look critically at your situation: is this business we *can* win or *need* to win? Is the investment worth the potential return? You may want to consider pulling back (number 9, below).

   If they will allow limited or guided contact with the customer, use the contact time to your best advantage. Ask questions, gain an understanding of their processes, their workflow deliverables, their challenges and the value they desire from the solution. Ask "biased" questions, as well, that serve to introduce capabilities that are biased in your favor, in comparison to your competition.

   If the customer or consultant's process does not allow you to have direct contact with the customer, then consider…

3. Ask the consultant to get the answers – a Conversation by Proxy:

   Give the consultant or customer representative a set of questions to be asked on your behalf. Very often the consultant or customer representative will insist that all other vendors also have access to the answers – this is fine. By framing the questions you (1) will be perceived as being more interested in the customer's situation and (2) have the opportunity to bias questions in your favor.

   The questions associated with Workflow Analysis are a terrific set to employ:

   - What is the customer's current workflow (what are they doing today)?
   - What is the objective of that workflow; what is the output of that workflow? Can we have (sanitized) examples of the workflow's current deliverables?
   - What needs to change – what are the problematic portions of the workflow and why?
   - What is the value of making the change? What gains are desired from making a change, in terms of time, people or money savings?

   Using a proxy to do qualification can generate a "win-win-win" result:

   1. You gain information you need to put together a successful demo.
   2. Your customer typically feels that the vendor(s) now have a better understanding of their situation; your customer may gain a clearer understanding of the nature of their situation, themselves.
   3. The consultant often gains additional business for this specific project – and another template to use in future engagements.

4. Add <u>Rows Biased in your Favor</u>:

   Many scripted demos are preceded by an RFP (Request For Proposal) – those lengthy, detailed, time-consuming documents often drafted by consultants or purchasing departments. In the process of responding to an RFP, contemplate adding "rows" to the RFP list of requirements that are biased in *your* favor.

   This works well if you have capabilities that you know your competition doesn't have or can't match. Consider adding them to your RFP response as additional "rows" of requirements.

   For example, let's assume that you can provide a SaaS (Software as a Service) version of your offering, in addition to your standard offering, and your competition can only provide a "behind the firewall" installation. You can include an item on your RFP response, an additional "row", that might look like the following:

   > "SaaS Capabilities: Other customers in similar situations to those described in this RFP found significant advantages in using a SaaS deliverable. They were able to (1) reduce the consumption of their internal IT support resources significantly, (2) enable an earlier implementation and initial roll-out, and (3) gain significant "early wins" and enjoy faster return on investment." In addition to our "behind your firewall" offering, we can also provide you with a SaaS version."

5. <u>Rearrange the Script Order</u>:

   Very often, customers and consultants simply want to see their list of requirements covered in your demo and are not really concerned with the specific order that is used. If there is a better order for you to show the capabilities in the script, ask for the right to rearrange it. This will give you the ability to organize the capabilities into a logical progression that maps to your software's workflow and strengths.

   Surprisingly, many vendors don't ask for permission to re-order the script. In cases where rearrangement would have been advantageous, those are lost opportunities.

   Occasionally, a vendor will rearrange a script without agreement from the customer or customer's consultant – they are hoping to "beg for forgiveness". This is a risky strategy. If the customer or consultant is willing to say "yes" ahead of time, then there was no need to take the risk of "violating the rules". On the other hand, if the customer/consultant is inclined to say "no changes to the script", then re-ordering the script without agreement may result in disqualification of the vendor. Better to ask ahead of time…!

6. Gently Subvert the Introduction:

   Many scripted demos include a slot for each vendor to introduce their company – to provide a corporate overview. This is a truly terrific opportunity to gently subvert the process…!

   Instead of consuming 20-30 minutes with a boring, generally unappreciated corporate overview, contemplate reducing your overview to 1-2 slides or (even better!) a few verbal statements. This will provide time to present Situation Slides and corresponding Illustrations for the key players that show off the best qualities of your offering, in a summary format. There may even be sufficient time for "Do It" pathways, as well – six minutes per situation is all you may need.

   This practice offers significant advantages: no matter how the balance of the demo is organized, you will have presented your offerings in the strongest possible manner, right up front. The use of Informal Success Stories as a part of this "introduction" adds an even more compelling dimension to your delivery.

   We have seen vendors win scripted demo competitions by using this strategy – customers have commented that they:

   1. "Really appreciated a useful, non-typical corporate overview segment…" and
   2. "You really got to the heart of our situation and showed clearly how your solution addresses our problems…"

   [For more on replacing traditional corporate overview presentations with more meaningful content, please see our article, "*Death By Corporate Overview*" – copies are available on our website at www.SecondDerivative.com or simply ask for it by email.]

7. Use a Checklist:

   Here's a simple and very effective tactic: Create a checklist of all of the capabilities listed in the script. As you complete each item, gain agreement from the key player or players and then place a ✓ on your checklist to show, conclusively, that the item was covered.

   You can create the checklist in Word, Excel, PowerPoint, clay tablets – the medium doesn't matter. What is important is that the key players *participate* in the act of agreeing that the capability in question was adequately covered – and that they *see* the ✓ appear on the list.

   At the end of the demo (or very soon afterwards), present a copy of the completed checklist to the customer's team. (An even stronger version of this approach includes copies of relevant Situation Slides and Illustrations.) The completed list leaves no questions of what you did or did not cover in your demo.

   The process of putting a ✓ on your checklist also provides a wonderful opportunity to…

8. Summarize:

Far too often, vendors move through a demo script as rapidly as they can, without pausing between script items. This results in a "drinking from a fire-hose" situation for the customer – generally indicated by glazed eyes and sagging heads…!

Instead, each time you reach the end of proving an item on the script, *summarize*. Tell the audience what you just did and, if appropriate, call out the unique benefits of your offering with regards to that particular capability. If you are using a script checklist, the act of marking the script item as complete provides the perfect opportunity for a brief summary.

For a more compelling effect, perform a "super-summary" at the end of logical sections of "chunks" of requirements or at the end of a workflow. If the customer's heads are nodding in agreement, you are doing a great job!

9. Pull-Back:

If you believe you are in a poor position before the demo competition and none of your requests for re-ordering the script or access to the customer have been permitted, consider pulling back – saying "No" to the customer. [Gasp!] Here's why you might want to contemplate this strategy:

1. You may be on the customer or consultant's list of vendors simply to show that they covered a sufficient number of vendors before making their decision – even though the decision had already gone to the vendor who is first on the list. This is known as being "Column Fodder" (from Solution Selling). Corollary: Be First!
2. You may not have sufficient capabilities in your offering, particularly in comparison to your competition.
3. Be honest with yourself – if you don't have a reasonable chance, then don't invest the resources. Don't "live in the land of hope"…! If you don't really have a reasonable chance to win the business, then decline the competition – and invest your team's time and energy in sales projects that have a higher expectation of success. In these cases, it may be better to fail fast, fail early, and fail cheaply…

Scripted demos are a challenge – this handful of ideas may enable you to turn the script in your favor, present a more compelling demo, and increase your organization's rate of success.

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