The Second Derivative
1538 Winding Way
Belmont, CA 94002
Phone: +1 650 631 3694
PCohan@SecondDerivative.com
www.SecondDerivative.com
www.DemoGurus.com
Peter E. Cohan, Principal

Remote Demonstrations – What Can We Do Better?

The name of the game in remote demonstrations is interactivity! This article provides ideas on how to take your stimulating personality, squeeze it through that internet connection, reach out and bring your audience back to you – using your voice, the tools in the software, and a few tips and tricks.

Yes We're Here, the Phone Was On Mute…

How many times have you been on the receiving end of a web-based (remote) demonstration and found your attention wandering? Worse, do you flip over to read email, mute your telephone to talk with colleagues or simply drop out of the demonstration?

Now turn the picture around and imagine yourself giving a Remote Demo. Is your audience paying attention? Are you losing people? Are you achieving your objectives?

Remote demonstrations are a doubly difficult challenge. It is hard enough to create a compelling demonstration that addresses your customers' key interests without the added complexity of executing the demo over web and telephone connections.

Save, Save, Save

The good news is that remote demonstration tools (WebEx, GoToMeeting, Adobe Connect Pro, eConference Pro, etc.) now offer the means to connect with your audience and demonstrate your offerings without stepping onto an airplane. This can greatly reduce the cost-of-sales and recapture time otherwise lost on the road.

The ability to schedule a Remote Demo in minutes means that you can react rapidly to time-sensitive opportunities. Sales teams often provide Vision Generation demonstrations via the web to advance a sales opportunity or to enable more qualification or discovery to take place. Many sales cycles *begin* with such a demo.

Inside Sales teams today often deliver web-based demos back-to-back, presenting multiple demos a day. Exhausting, but potentially highly productive.

Remote Demos are also terrific for follow-on sessions to prospects already exposed to you in a previous face-to-face meeting. All of these types of interactions can be done using only a laptop, a phone, and the web conferencing tool – from anywhere.

The bad news: The inability to *see* your audience presents risks unique to Remote Demos vs. face-to-face meetings. There is often little or no direct interaction with your audience and customers are generally less likely to ask questions in a Remote Demo.

If a sales opportunity depends on the success of a Remote Demonstration, then we must find ways to increase the likelihood of connecting effectively. Let's do so!

"Sharpen the Saw…"

The rest of this article can serve as a checklist of best practices and tactics you can employ before and during the event. However, a fundamental prerequisite is the ability to be able to *use* many of the capabilities of your web conferencing tool.

Here's a rather strong recommendation: set up a 30 minute session with a colleague and try out all of the capabilities of the tool. Gain experience with these capabilities *before* going into a session with a customer:

- Get comfortable with the various screen sharing modes. Can your colleague see your full shared screen? Is there an impact from virtual machine environments?

- What is the delay time – the latency? Is there a difference between scrolling in your application and using PageDown? (Yes, for many tools…)

- Do you know how to use the annotation tools? Erase markings? Use the whiteboard? Give and re-take control? Show a "clean" desktop? Use video?

Invest 15 minutes trying out everything in the tool – and take feedback from your colleague. Then switch and return the favor.

[If you haven't already done this before, do it now – before reading the rest of this article…!]

OK, now for the checklist – boring, dry, but potentially a collection of real nuggets for you… (Gold nuggets are also boring and dry, but very valuable…!) I'm organizing the information in terms of:

1. Truly best practices (strategy)
2. Before the Demo (pre-demo set-up and preparation)
3. During the Demo (tips, tactics and methods to engage and compel)

Looking forward to your feedback and additions…!

Truly Best Practices

Your best bet is to split your forces. Send *one* person to the customer site to be "eyes" for the rest of the team – to be an *active conduit* of information.

For example, your technical resource can remain at headquarters and perform the demonstration remotely. Your sales person travels to the main customer site and joins the meeting in person. You still save *half* of the costs of the associated travel expenses, but gain in several wonderful ways:

- Audience's attention is compelled – because the sales person is present in the room with the audience.
- The sales person serves as the "eyes" for the technical resource located remotely.
- Your sales person can actively *manage* the meeting.

Let's explore in more detail how to be an *active conduit* of information. The vendor representative at the customer site needs to:

- Physically organize the meeting room – screen location, improve screen visibility, re-arrange speakerphone mics, etc.
- Help perform introductions (Name, Job Title, Key Objective for the meeting…) for all customer participants.
- Monitor people who come and go – and alert the remote colleague ("Hold on, Bob, we've just had a new person come into the room…").
- Give feedback on delay time ("Slow down a bit, Bob, looks like you are about 3 seconds ahead of what we are seeing here…").
- Scan the audience's faces for unspoken questions (or raised hands!).
- Manage questions – and repeat questions and comments that may not be heard by the remote person over the speakerphone.
- Deal with technical challenges and manage the process.

This strategy, very simply, provides the best results for remote demos.

What if you are unable to have your representative present at the customer site? The next-best strategy is to engage your Champion (or Coach, Sponsor, etc.…) to be your active conduit of information for you.

By imbuing your Champion with the responsibility and providing him/her with specific tasks, you can achieve much of the same result of having your own representative present. For example,

> "John, for today's demo, will you be my 'meeting monitor', my eyes? Specifically, can you please let me know when new people arrive or others leave, if there is a delay on the screen, or if people look like they have questions. Can you please 'pause' me if there is a side conversation – and repeat any key issues for me?"

Tips and Tactics Before the Demo

What you do to set-up and prepare before beginning your demo can have enormous positive impact – and can begin to train your audience to interact with you:

- Start the meeting 15 minutes early. Seriously. Send your meeting invitation to your Champion or other representative to have the web session begin 15 minutes *before* the "real" meeting is scheduled to begin. This enables you to get the technology up and going, check screen resolution, voice/microphones and even review any changes in the customer's situation. This way, everything is ready-to-go when the balance of the customer's team comes into the room.

- Check firewall/internet access issues. Can still be an issue with some companies and many government organizations.

- Test for screen resolution/visibility: Move your mouse to the top-left corner and ask, "Can you see my mouse (top-left)?" Then move to the bottom-right corner and ask again. You've actually accomplished two objectives – you now know how much of the screen the audience is seeing *and* you are beginning to train your audience to respond to your questions (generating interactivity).

- Test audio. "Can you hear my voice adequately?" (Can you also hear them?). Move microphones, adjust volume as needed. If they can't hear you it's over.

- Generate a "Meeting Participants Map": Ask everyone in the room (or rooms, if multiple sites are involved) to answer three quick questions:

    - What is your name?
    - What is your job title?
    - What one objective would you like to accomplish in today's session?

  Make sure that everyone responds, so that you *know* who is in the session with you. You have also done a (very) basic level of discovery and are gently forcing the audience to interact. [This works reasonably well for groups up to ~20 people – above 20, you can ask for a few representatives to speak for the balance.]

- From time-to-time, set up a *second* computer to act as an "audience" machine that you can monitor. This provides a wonderful way to see what the audience is likely seeing – delay time, resolution issues, color/graphics rendering, etc.

- Use a headset (not a speakerphone) whenever possible.

- Set your mouse style to "Bronze-3D" (on Windows machines). This is, apparently, the most visible non-annoying mouse style to use.

- Turn off instant messaging and email preview/alerts. These can be embarrassing!

During the Demo

Generating <u>interactivity</u> is critical to improving your odds in any remote demo situation.

- Use a Roadmap or agenda. Toggle between the Roadmap (e.g. in PowerPoint) and your application to keep the audience on track, break up the demonstration into easily consumable segments, and to help you summarize at the end of each section.

- Use the drawing and annotation tools. The act of a new graphic dynamically appearing wakes people up and draws their attention to the screen with renewed interest. There are a pile of tools typically available:

    - Pens, highlighters, "stamps", arrows, boxes, lines…
    - Reverse highlighting of text in your application
    - Zoom in/out in browser windows (CTRL-Mouse Roller)

- There are other tools available to help, as well:

    - CTRL to show where the mouse is (a windows setting)
    - Use "Tool Tips" as a highlighting method
    - F11 in Internet Explorer (and other browsers?) hides extra toolbars

- For large sessions and webinars (audiences >20 people, with muted phones) use "Chat" for bi-directional communication (in addition to the less-compelling use of polls). Asking for responses from the audience via Chat forces them to type, engage and respond.

- Mouse slowly and deliberately. Let me say that again: Move your mouse sllllloooowwwwwlllyyy and d-e-l-i-b-e-r-a-t-e-l-y. Zippy Mouse Syndrome is curable.

- "Move and Stop". I've found the most amazing principle: if you take your hand off of the mouse, it stops moving. Yes! Incredible! Move the mouse to where you want it to be, then take your hand off while you talk… It doesn't move! (Ever see anyone circle endlessly with their mouse…?)

- Pause – give a moment for people to respond, particularly when they are on speakerphone systems. Musicians and presenters know the "power of the pause".

- "Park" Good Questions using a Word document (shared for public viewing). This has the same impact as using a whiteboard to park questions in a face-to-face meeting. Very elegant and very effective!

- Ask questions as you go: Use "closed probes" at first, to train your audience ("Can you see my mouse at the top of the screen? Everyone?"). Ask "open probes" once the audience begins to interact. Ask questions of specific individuals, if appropriate.

- If you think latency is a problem or has changed since the start of the session, test again by saying, "I'm going to click to show the next graphic – please let me know when you see it. Three-two-one-click… OK, looks like the lag time is now about 2-3 seconds…" (You can do this at the beginning of a session as well – another great way to test response time and generate interactivity).

- Don't read. Instead, invite the audience to read a slide or text on their own – and to tell you when they are done… A great way to re-engage!

- Use the Menu Approach to begin a session, when appropriate. Ending up with a rank-prioritized list of solutions/topics is a wonderful way to engage, generate a live Roadmap, and align the demo to your customer's top interests.

- Give control to an audience volunteer and have the volunteer "drive" a portion of the demo. The volunteer becomes intimately engaged and the balance of the audience will be on the edge of their seats. This is an extremely effective technique. It has the added advantage of tacitly proving ease-of-use. Manage risk by using your Champion or other supporter… and consider practicing this ahead of time!

- Resist the urge to point at your *own* screen with your finger… Shockingly, the customer cannot see your hand! This is your body's way to telling you to pick up and use an annotation tool.

- Summarize early and often. Summarizing helps keep the audience with you and provides them an opportunity to ask questions.

- Record some of your sessions for your own personal (and private) playback. Yes, you will hate the sound of your voice, but listening to your delivery will help you improve and, um, you know, sorta kinda, you know, remove extraneous vocabulary. You'll also have the opportunity to hear your *customer's* questions and comments a second time – you may be surprised how they were initially interpreted by your team! Very humbling, very effective.

The name of the game in remote demonstrations is *interactivity*. The better you engage, the higher your probability of success. Additional ideas? Let me know…!

For more on demonstration effectiveness skills, tools and methods, visit our website at www.SecondDerivative.com. For demo tips, best practices, tools and techniques, join the DemoGurus Community Website at www.DemoGurus.com or explore our blog at http://greatdemo.blogspot.com/.