The Big Demo Checklist

You've landed the "Big Demo" with your next customer. Use this checklist for preparing and executing on your meeting.

PART I: Pre-Demo

1 week before:

☐ Complete a "pre-call" one (1) week before the meeting with Product Champion.

☐ Verify attendees, roles, and identify any additional important people that should attend but either have not yet been invited or have not accepted.

☐ Verify with admin assistant or Product Champion that the selected web-sharing/screen-sharing software is admissible with firewalls.

48 hours before:

☐ Send personalized confirmation email 48 hours before the meeting to all attendees:

> "What is the most important question, issue, or part of the product you would like to see or discuss in during our time together?"

☐ Create an "Outcome Summary." Collect the responses, summarize, and print in a single page to have available as reference and for notetaking during the demo call.

☐ Sketch the meeting flow from point of login to completion of the call.

☐ Prepare your slides:

> **Slide #1**: This is a placeholder for when attendees login to the web meeting. A humorous picture or the headlines from a recent news article about the company or the industry often works. This allows you to check that all attendees can view your screen.

Slide #2: This is the “Situation Slide” - summarizing key problems and outcomes of the customer. Examples here: http://greatdemo.blogspot.com/2013/04/situation-slides-three-options-for.html

☐ Make sure your web meeting is set up to record.

PART II: The Demo Start

☐ Login to the web meeting five (5) minutes before the official start time and be ready to engage with anyone else that might be on the line early.

☐ Share screen with your opening slide.

☐ Have a current event or news article about your company or their industry ready to discuss:

> “I just read this morning in the Wall Street Journal about how your CEO is on a road show with investors…"

☐ Confirm that your meeting is recording.

☐ Sound check and screen-sharing check. Ask an open-ended question:

> “What does everyone see on my screen? Can you see the logo on the upper right and the red dot on the lower left?"

☐ After attendees are logged in, create interaction:

> “Thanks everyone for joining. It looks like we have everyone we’re expecting. Real quick so that I can put a voice to the name, I’d like to have each of you just quickly say your name and share the most important question or outcome you’d like to get from our time today.
>
> "Would that be okay? … Great.
>
> “[INSERT PRODUCT CHAMPION NAME], let’s start with you…"
>
> Write notes on your "Demo Prep Worksheet."

☐ Officially begin the meeting:

> “Okay great. Thank you everyone. The purpose of the call today is introduce you to the XYZ Platform from our company, ABC Associates. To make sure we’ll all on the same page, I’ve summarized the key points from previous conversations I’ve had with some of you.
>
> "I’d like to share that with you first, then we’ll dive into the product. Does that work for everyone? Great."

☐ Click to the “Situation Summary” slide (slide #2).

☐ Discuss the “Situation Slide” completely and succinctly:

> “Does that make sense? Is there anything missing here? …. Great.”

☐ State intended outcomes for the call:

> “We’re about to dive into our application in just a moment. What we’ve found in the past is that, assuming that we check the boxes on what you need to see today, the next step would be to [INSERT NEXT STEP - i.e set up an onsite for deep dive of the product; meet with your technology team to discuss how an integration might work with your existing system; schedule time with your CEO to talk about budgeting; etc].
>
> “Is everyone good with that?"

PART III: Leading the demo

☐ Be ready, willing, and able to withhold some information purposely as a reason to follow up after the demo.

> For example, this might be the answer to a technical question, timing on a particular feature, or pricing.

☐ Focus on the product today. Do not allude to future features unless the customer asks.

☐ Never apologize for the product or lack of a feature. Your product is awesome exactly the way it is.

☐ Keep the demo moving. Avoid getting stuck on a series of technical questions or future product state - ie. “When will this or that feature be ready?"

☐ When technical questions arise, limit your answers to three (3) questions:

> “These are all great questions and I want to answer all of them for you. We can probably spend 2-3 hours diving into the technical stuff under the hood, so let’s do this...
>
> “Can I either give you a call right after this broader conversation or schedule time with you later in the week?"

PART IV: Closing & next steps

☐ 15 minutes before the end of the scheduled meeting time, pause and state:

> “We have about 15 minutes left in our time together, and we should make sure to leave a few minutes to discuss next steps.
>
> "And remember, this is really just an introductory conversation to give you a quick view of what we do. We can always set up another call if we need.
>
> "Is that okay with everyone? Great.
>
> "What are 1-2 important questions or features you’d like to cover in our time left? [INSERT PRODUCT CHAMPION], any suggestions?"

☐ 10 minutes before the end of the scheduled meeting time:

> “So checking my notes, I think we’ve covered most of the initial questions you all had, and it seems like this is at least worth exploring a bit further together.
>
> "Would you all agree? Great."

☐ Stop sharing your screen and go back to Slide #1.

☐ If the “price question” comes up:

“Definitely. I’d be happy to answer that for you. [INSERT PRODUCT CHAMPION NAME], could I get your help after the call to answer a few key questions we’d need to provide a price?

“For example, we’d need to understand things like:

- Implementation support - who’s responsible for what
- How many users would be starting at the start, and how many we might add over the first year.
- Which components of the platform you’d want to use today vs the future
- Timing to get started
- SLA requirements
- Contacting your procurement teams for their vendor requirements.

“Once we have that info, we can definitely put together some pricing for you. Does that make sense?"

☐ 5 minutes before the end:

“We’re coming up to the top of the hour and I want to be respectful of everyone’s time.

“At the start of the conversation, we agreed that the right next step would be [INSERT AGREED UPON NEXT STEP]. Have we answered everyone’s questions today so that it would make sense to do that?

“Great. [PRODUCT CHAMPION}, should I work with you on that or someone else?"

☐ 2 minutes before the end:

“Great. Thank you everyone for your time. Looks like we’re at the top of the hour. [PRODUCT CHAMPION}, I’ll send you note just after on next steps."

☐ End the meeting and screen-sharing.

PART V: Post-Demo

☐ Call your Product Champion immediately after the call to discuss how the meeting went.

☐ Send personalized emails to each attendee thanking them for their time and asking if they had their questions answered.

☐ Schedule any additional meetings that surfaced from the demo. ie. Technical buyer wants to do a 1:1 call to discuss more questions.

☐ Add any new contacts to your CRM.

☐ Log meeting notes into your CRM.

☐ Make your next sales call while your confidence is high.

☐ Go for walk outside and be proud of yourself for leading an awesome meeting.