Peter E. Cohan
The Second Derivative – Great Demo!
1532 Scenic Drive
Trinidad, CA 95570
T: +1 707 677 3764
E: PCohan@GreatDemo.com
W: https://GreatDemo.com

Automated Demos Best Practices

A Never Stop Learning! Article

"If you automate garbage demos, you're just sending out lots of garbage!"
- Peter E. Cohan (Me!)

This article is for vendors who *use* automated demos (ADs), but there is also important guidance for the automated demo toolmakers as well!

There are *two* distinct journeys to contemplate:

1. The vendors' *prospects* who consume ADs
2. The needs and desired deliverables of the *vendors* themselves

Let's explore both!

Part 1: Prospects' Journeys

This is the perspective that most of us focus on, and it is logical. After all, if prospects aren't engaged and fail to act, then your automated demos are failures.

It is not simply about presenting a clickstream or a choose-your-own-adventure pathway. Don't just record or generate your ADs by following the clickstream of your "standard demo." ADs are *different* than human-delivered demos: There is no opportunity for a *conversation*.

Before beginning, consider your objectives for your ADs. Are they for demand generation? Provided in response to a prospect's request to "see a demo?" Offered as proof points? Your objectives impact the *context* of the ADs greatly!

Successful automated demos need to satisfy a broad number of parameters (just as human-delivered demos need to, as well!):

- Setting Context
- Problem Identification
- Solution Presentation
- Advantage and Value Communication
- Length
- Call to Action
- Simplicity
- Clarity
- Engagement

Note for the automated demo vendors (ADVs): If you want to see renewals, references, and expanded use of your tools, you may need to coach *your* customers on these points!

Setting Context

I'm surprised at how many vendors send out ADs that *assume* the recipient understands the situation implicit in the AD. There is often no communication of what specific job titles are targeted, what general scenario is contemplated, or other relevant information.

This would be like going to a restaurant where the menu is simply a long linear list of items, spanning breakfast, lunch, dinner, and all types of dishes. You'd probably give up and walk out without ordering anything!

Think in terms of communicating at least two situational elements:

1. Who is this AD for?
2. Why should they be interested?

Example:

> "This automated demo is for sales and revenue leaders seeking to improve forecast accuracy and predictability."

Here's another example that uses a Provocative Question:

> "Have you, as a sales or revenue leader, ever been fooled, disappointed, or surprised when your forecast didn't reflect reality?"

(For more on Provocative Questions, see page 253 in *Doing Discovery*.)

Other potentially important context parameters might include the size of the prospect, market or vertical, geography, maturity, and more. Set the stage as needed to make context clear!

Problem Identification

While providing little or no context is a poor start, many vendors make things even worse by failing to describe the problem(s) that prospects may face. Instead, they dive directly into creating clickstreams and pathways that guide prospects into swamps of "Now click this" and "Here are several options…"

The result? These ADs feel like training tools, but still lack any communication regarding *why* the prospect should embrace a change!

Good ADs clearly describe the problem(s) faced by the prospect. Example:

> "Salespeople are notoriously poor at forecasting their opportunities. Some 'sandbag,' presenting their opportunities as 'long shots' with low probabilities of closing. Others suffer from 'happy ears,' showing inflated probabilities. And many salespeople never input their opportunities at all!
>
> The results are forecasts that you can't count on. In many organizations, sales and revenue leaders spend *hours* interviewing their team and manually inspecting opportunities' status and progress parameters, then update their 'real' forecast – and they do this over and over!"

The best ADs also include value statements as part of the problem set:

> "Our customers complained of unacceptable forecast accuracy ranging from 45-70% before implementing our solution…"

With the problem set sufficiently defined, successful ADs present their offerings' solutions.

Solution Presentation

When creating ADs, there are two parts to presenting solutions to consider:

- The "What": What *deliverables* are desired by the prospects.
- The "How": How the prospect navigates to or generates the desired deliverables.

Most vendors focus on the "How" portion, showing the steps to complete a process. This is only a partial picture and is the *less* important of the two!

In our example, if *you* are the sales or revenue leader looking to improve your forecast, you would want to see a completed, *accurate* forecast, with indicators of confidence for the individual opportunities, perhaps along with the factors contributing to low or high close probability. These represent the "What" (deliverables) and often take the form of dashboards, reports, and similar screens.

As an experienced revenue generation leader myself, I want to see three such deliverables:

1. An accurate and predictable forecast for this quarter
2. The pipeline looking out over the next four quarters
3. Any opportunities that need attention or reps who need coaching

(These are known as "Illustrations" in Great Demo! methodology and are *perfect* for ADs!)

In fact, the descriptions above are reasonable example solution presentation statements that could be delivered on-screen or via voiceover.

Again, the *best* vendors include tangible value statements. In this example, we might offer, "Our customers report increases in forecast accuracy to 75-90% and higher!"

Advantage and Value Communication

In my recent reviews of dozens of ADs, *very* few vendors communicated any value elements at all! They focused on the steps to complete a task, such as, "Here's how to update your forecast" (and presented from a *salesperson's* perspective as opposed to a revenue leader's view).

Imagine a restaurant menu that lists ingredients and recipes but never actually describes the completed dishes! In an AD for a restaurant, you'd want to show an image of the plated dish, with a mouth-watering description (and bonus points for finding a way to communicate the delightful aromas)!

Let's review a few definitions:

- Features are descriptions of the capabilities offered in a product or service.
- Advantages are the gains or improvements that a customer *might* enjoy.
- Benefits represent the value a product or service can provide and include a prospect's *confirmation* of the need or desire.

Here are examples of communicating value following these definitions:

- Feature Approach: "Our software offers forecast filters and accuracy checks." No value communicated at all!
- Advantage Approach: "Our software offers forecast filters and accuracy checks, enabling increases in forecast accuracy to 75-90% and higher." Value is communicated but is *assumptive*.
- Benefit Approach: "Using our forecast filters and accuracy checks, it looks like you can increase your forecast accuracy from your current number of 55% to about 85% or higher, based on the information you provided." Value is communicated based on the prospect's specific information.

Clearly, you can't communicate benefits without having a conversation with your prospects, so you are limited to feature or advantage statements in your ADs (unless they are ADs sent *after* discovery!). While the choice is yours, please avoid feature statements since they don't communicate value at all!

An elegant and effective method of communicating value is to report the value enjoyed by current customers that are perceived as *similar* to your prospect. Communicating relevant context enables this to take place: "Our customers, who are in similar situations to yours, report increases in forecast accuracy to 75-90% and higher!"

Length

When Abraham Lincoln was asked, "How long do you think a man's legs should be?" he replied, "Long enough to reach the ground."

You should use the same principle for your ADs: The best length for legs is the shortest distance to the ground; the best length for your ADs is the shortest amount of time to successfully communicate your message.

"Gosh, Cohan, that's not much help!" I hear you say, "What's the right length for our automated demos?" It depends!

Executives can be satisfied and pursue your call to action (CTA) in a surprisingly short period of time (that might be less than a minute!). Middle managers may want a bit more info and staff members may want even more, but the general maximum length for ADs is about six minutes.

Interestingly, four to six minutes is also the recommended length for human-delivered Vision Generation Demos, which are designed to accomplish similar goals as ADs. Vision Generation Demos are subject to the same nine parameters in this article and represent an excellent starting point for structuring your ADs (See Chapter 11 in *Great Demo!* for specifics).

Remember, your objective is to *entice*, not overwhelm.

As an analogy, a waiter in a nice restaurant has a similar objective and has practiced verbally presenting "tonight's specials" to secure the most sales. They don't recite the entire recipe; they describe *just enough* to get their clients salivating!

Intriguingly, waiters *also* know that a great visual can be a very successful way to stimulate interest. Restaurant waiters know that they'll sell *many* more desserts by bringing out and displaying the dessert tray vs simply handing out a paper (or web-based) dessert menu!

When considering length, remember that one picture is worth a thousand words. And in a demo, one compelling visual is worth a thousand mouse clicks!

OK, your AD has enticed your prospect: what's next?

Call to Action

I was *appalled* at how many ADs lacked *any* CTA. Many didn't even provide contact information! Clearly, these ADs were created by the "Sales Prevention Team." (Don't be a member of that team…!)

Consider two types of CTAs:

1. Contact sales
2. Nurture

For prospects who are in an active buying process and *want* to engage with you as a vendor, provide them with a "Contact Sales" or "Schedule a Conversation" option. For prospects who *aren't* yet in an active buying process or are reluctant to engage, offer a "Keep Me Informed" option.

The first group should be willing to engage with your sales team; the second group isn't ready *yet*. The "Keep Me Informed" option provides this second group with a mechanism to receive updates and news until they are *ready* for direct contact with your sales team.

Simplicity

Humans (who I believe includes most of us) are rather poor at remembering things, and demos are no exception! The Attention-Retention curve tells us that audiences remember the first one or two items in a long list best, followed by the last item on the list as second best. Everything in between suffers from surprisingly limited recall!

This also suggests that three main messages may be the limit of what you can successfully communicate in your ADs, based on the same principle.

With that in mind, the longer your AD clickstream or pathway, the *less* likely it will be remembered. If you present pathways that are three clicks (or steps) or fewer, you're golden!

"But" I hear you cry, "what about all our really cool features? What about our key differentiators?"

Review your objective(s) for your ADs. If, for example, you want your ADs to serve as teasers and generate interest so that your prospects want to connect with your sales team, don't overwhelm prospects with too much. Your ADs are *appetizers*, not five-course meals!

Choose the capabilities and, most importantly, the *deliverables* that are most compelling for your prospects to see. One way to accomplish is to ask, "What would our prospect want to see when they first start work on Monday morning?"

What information would make their Monday morning review more accurate, effective, productive, visible, or timely? What data is lacking or insufficient today and what would its availability mean for them? What improved or new dashboards or reports would enable them to achieve their objectives more effectively or rapidly?

Just show enough to convince your prospect to take the next step with you! William of Occam provides excellent guidance (Occam's Razor, paraphrased): When presented with several options, choose the simplest!

Clarity

I shouldn't even *have* to discuss this, but because so many ADs included vendor-specific jargon and myriads of obtuse acronyms, apparently a note on this is needed.

Don't. Just don't.

Assuming that your ADs are for *sales* or *marketing* purposes, don't make them *training* tools! Avoid any uncontrolled vocabulary, acronyms, and the like.

In addition, consider your target audiences' geography, language, market, vertical, etc. Map your text or voiceover to your audience's common denominators.

Engagement

Some of the best ADs include humor, analogies, metaphors, and brief stories. These can turn a dry, boring AD into a piece that communicates your desired messages while making them engaging, enjoyable, and "sticky."

Take advantage of the capabilities in the AD package as much as possible. The use of callouts, voiceovers, color, highlights, blinking, annotations, etc. can be surprisingly engaging. Regarding color, however, be aware that about 7.5% of men and 0.5% of women are color-blind (particularly red-green color-blind, making it difficult or impossible for these folks to differentiate those colors)!

Opportunities for your prospect to choose-your-own-adventure or select a preferred pathway can improve engagement. However, make the choices easy and intuitive or your prospect may give up and abandon completing your demo. I've encountered ADs that made me struggle and have to guess what to do next or where to find the next step. Be clear on your guidance!

Another dimension to consider is the amount of *discovery* information that the AD tool can capture. Some tools lack any ability to execute discovery, others enable the collection of data sufficient to provide a more focused AD, and a few allow numerous questions to be presented to prospects. Those tools that can determine a prospect's persona are good; those that react to specific job titles' interests and needs are even better.

In any case, be careful to avoid overwhelming your prospect with lengthy intake forms. While they may yield the most discovery data when completed, they may *also* cause prospects to exit the process before consuming the demo! I've encountered this personally a few times and elected to exit rather than to complete their questions. Remember the importance of quid pro quo in doing discovery! (See the section on "Empathy and Quid Pro Quo" in *Doing Discovery*, page 199.)

Finally, AD tools that enable your prospects to input comments or questions may encourage engagement and improve retention of the key ideas. The act of having to *think* about something or make a considered choice increases retention of the experience.

If possible, experiment! Try different options and compare.

Part 1 Summary

We've explored the following nine important parameters for successful ADs:

- Setting Context
- Problem Identification
- Solution Presentation
- Advantage and Value Communication
- Length
- Call to Action
- Simplicity
- Clarity
- Engagement

Use these as a checklist!

Now, let's say you've generated one or more ADs, and your prospects are consuming and reacting to them. How will you know what's really working? This sets up the perfect segue to…

Part 2: The Vendors' Journey

This segment is targeted at those of you who are currently using or contemplating purchasing automated demo tools. Here's the simple takeaway:

It's all about analytics!

Capture and track as much data about the prospects' experiences as you can.

Basic:

- What did they consume?
- Where did they linger (and why)?
- Where did they struggle (and why)?
- Where did they exit, if they exited early?
- Did they pursue a CTA?
- Did they explore the full AD?
- Did they watch it more than once?
- Did they pass it along to others (and if so, who)?
-

More elegant:

- If there are opportunities for interaction where prospect responses or other data can be captured, what did they input or choose?
- Are there analysis capabilities to examine changes over time?
- Is there an ability for A-B (and A-B-C-etc.) comparisons?
- Are there connections to the popular CRM systems (and/or a "well-behaved API")?
- Are there any data elements that correlate strongly with closed business?
- Can you download the data for further slicing and dicing?

At the end of Part 1, I suggested experimenting and comparing results from different ADs. I want to emphasize the importance of this: Just because you're seeing some prospects clicking your CTAs doesn't necessarily mean you're getting all you can from your ADs.

Test, test, and test some more! Run the experiments to compare your results across as many of the nine parameters as your AD tool allows. Does a crisper message yield better outcomes? Are you using the best, most compelling visuals? Could your text or voiceover be clearer? Are you communicating value in the best way, citing the most significant metrics?

Just as we humans (should!) constantly seek to improve our live demos, your ADs should *also* enjoy ongoing improvement. Carefully analyze the data available and explore which parameters or combinations of parameters yield the best results.

And if the tool you use can't track a metric you feel is important, push the toolmaker to implement it! Which brings us to…

Guidance for Automated Demo Toolmakers

Hey ADVs! When you are presenting demos to vendors (as *your* prospects), remember that there are *two* journeys they want to see:

1. Their *prospects'* journeys
2. The data and analytics *generated* during their prospects' journeys

An excellent approach for ADVs is to seek to understand your customers' KPIs and their objectives with respect to ADs. Then, incorporate the ability to track those KPIs or the underlying data in your tool.

A word of caution for ADVs: While many developers are excited about creating and improving the *prospects'* journey in their AD offerings, they are often much *less* interested in building capabilities to display and analyze the data! The former is often perceived as a fun challenge; the latter is considered boring and mundane. Very simply, the automated demo tools with superior analytics capabilities will typically win!

Part 2 Summary

There are *two* journeys to pursue:

1. *Prospects'* journeys through the ADs
2. The data and analytics those journeys produce

A Final Comment, an Offer, and a Recommendation

"If you automate garbage demos, you're just sending out lots of garbage!"

When someone on your team presents a traditional "harbor tour" or other uncompelling demo, the impact is limited to that one experience. It may negatively impact that particular sales opportunity but, if corrected and improved, that may be the limit of the damage.

On the other hand, take that same awful demo and broadcast it to hundreds or thousands of prospects, and the impact could be tremendous and long-lasting!

When you create your ADs, be mindful to make them as compelling and engaging as possible. Review the parameters in this article and use it as a checklist!

An Offer: If you'd like free feedback on your automated demo(s), send them or their URL to me at PCohan@GreatDemo.com. First come, first served!

A Recommendation: Contact Natasja Bax (NBax@GreatDemo.com) for specific guidance for *your* automated demos. Make every automated engagement a productive one!

To learn the methods introduced above, consider enrolling in a Great Demo! Doing Discovery or Demonstration Skills Workshop. For more demo and discovery tips, best practices, tools and techniques, explore our blog and articles on the Resources pages of our website at https://GreatDemo.com and join the Great Demo! & Doing Discovery LinkedIn Group to learn from others and share your experiences.