Peter E. Cohan
The Second Derivative – Great Demo!
1532 Scenic Drive
Trinidad, CA 95570
T: +1 650 631 3694
E: PCohan@GreatDemo.com
W: https://GreatDemo.com

Automated Demo Content – Getting It Right

What's in this article for you?

- An exploration of your own and your prospect's objectives for automated demos and associated Use Cases
- Definition of two types of demos to map to the Use Cases
- A stepwise process to prepare each type of demo

Let's begin!

You've been asked to put together the content for an automated or recorded demo – where do you start? What should be included?

Some Important Perspectives

Traditionally, different departments within a vendor often want to "own" their organization's automated demos, resulting in internal competition, confusion, and ineffective deliverables.

For example:

What's Marketing's (traditional) perspective?
- More, more, MORE! Put in as much as you can! We need to show as much as possible!

How about Sales' (traditional) perspective?
- Give me something that will cause the prospect to reach out to us…!
  Or
- Give me a "magic bullet demo" that will close the deal…!

And Presales' (traditional) perspective?
- How am I going to cram 60-90 minutes of "overview" into a 2-3 minute recording?

Perhaps the best starting point is your *prospect's* perspective! After all, these automated demos should be designed to map to your prospect's buying journey and their specific needs at each stage.

Accordingly, here are five high-probability Use Cases to consider, all from your prospect's perspective. These range from early in their journey, before a buying process has begun, and continue through the later "proof" stages of their process.

The Five Prospect Use Cases:

1. I'm just browsing and simply want to get an idea of what is possible for the future.

2. I'm early in an active buying process and need to understand which vendors to explore.

3. I need to get a deeper understanding of each vendors' offerings.

4. I've seen an overview and now have questions about specific capabilities.

5. I'm championing this effort and need something to help me communicate and sell internally.

Each of these represent opportunities to automate. But before you do, let's examine *your* goals and objectives for this effort, in parallel with your prospects'.

Goals and Objectives

Your first step in determining content is to be clear on the goals for the recording. You'll need answers to the following questions:

- What are our goals with respect to scaling and/or compressing our sales or presales processes?
- What are our goals regarding enabling our buyers for their processes?
- Who is the target audience?
- What is the desired outcome?
- What is the stage of the sales/buying process (i.e., which Use Cases above)?
- What action do we want the prospect to take?

We'll harvest and use the answers to these questions a bit later…

Your next step is to match the type of demo to the five Use Cases.

Types of Demos

There are two types of demos that can be automated or recorded:

1. Vision Generation Demos: To communicate what is *possible*.

   Vision Generation Demos are delivered *prior* to doing discovery. They are the crisp replacement for traditional (and ineffective) "overview" demos. Vision Generation Demos must be targeted to the needs and interests of individual Job Titles.

   (You can find details on Vision Generation Demos in *Great Demo!* Chapter 11 starting on page 258.)

   Vision Generation Demos are aimed at Use Cases 1 and 2, in particular, and for some applications of Use Case 5 as well. They are designed to run just a few minutes, making them perfect for many automated demo platforms.

2. Technical Proof Demos: To *prove* specific capabilities.

   Technical Proof Demos are delivered *after* sufficient discovery has been completed (as defined by a reasonably complete Great Demo! Situation Slide for a specific Job Title). Technical Proof Demos address specific questions and proof points for prospects: "Can it do this?" "How do you do that?" "How long does it take to complete this?"

   (You can find the full process for creating and delivering Technical Proof Demos in *Great Demo!* starting on page 68 in Chapter 5.)

   Technical Proof Demos are the solution for Use Cases 3 and 4, along with some instances of Use Case 5. Technical Proof Demos are designed to run exactly as long as needed to address the prospect's questions and confirm proof of capabilities. They are precise and focus on the specific solution desired by the Job Title in question. Accordingly, their length can vary from a minute or two to several minutes for each solution or portion of a solution.

These demo definitions make it easy for us to determine what is needed for our prospects.

Another Important Dimension – Just Browsing vs Active Buying Process

Before going deeper, let's examine the two types of prospects and their interests:

- "Just Browsing" Prospects

  Prospects who are Just Browsing are *not* (yet) in an Active Buying Process. They may be researching problem and solution sets, they may be setting plans for the future, or they may be simply trying to understand if solutions even exist for problems they are exploring.

  Just Browsing prospects typically want to get a high-level understanding of what is possible in terms of potential solutions: This is Use Case 1. They are often defining their problem set and only have a vague understanding or vision of solution options. Automated Vision Generation Demos are a terrific way to shed light on what's possible…!

  Many Just Browsing prospects are "qualified out" in *traditional* sales processes. An advantage of automated Vision Generation Demos is that they can satisfy these prospects and encourage them to return to you when they enter an Active Buying Process, without any live interactions!

  Importantly, traditional overview demos often deliver *too much* information to these prospects, overwhelming them with a broad (and sometimes deep!) range of features and functions. Just Browsing prospects can become confused and avoid moving into an Active Buying Process when they perceive vendor offerings as "too complicated", "too detailed", or "difficult to understand."

  I once heard a prospect comment, "I asked for a simple picture of what's possible, but the vendor sent me the full movie, with prequel and sequel add-ons!"

- "Active Buying Process" Prospects

These are prospects who *are* in an Active Buying Process. They have a plan to solve their problem(s). They have likely allocated budget and other resources to purchase and implement a solution. A Buying Committee is probably in place and they have defined their problem space reasonably well. They are actively seeking vendors that can provide solutions.

Active Buying Process prospects want to understand how vendor offerings match their needs and wants. In many cases, they also rely upon vendors to help *define* the solution space, as their visibility into solutions can be limited. "I had no idea that was possible!" is a frequent exclamation heard in discovery conversations. Ultimately, Active Buying Process prospects want to see exactly *what* capabilities are required for their solutions and *how* they work.

Active Buying Process prospects may move through several stages in their buying processes, starting with seeking an understanding of solutions at a high level (Use Case 2), then grilling vendors on the specific details of reporting, alerting, and operating workflows (Use Cases 3 and 4). These prospects will often *start* with requests for Vision Generation Demos ("What's possible?" – Use Case 1) and then ask for Technical Proof Demos to provide details on "How does this work?" and "Can you do this other thing?" (Use Cases 3 and 4).

The transition from Vision Generation to Technical Proof takes place when discovery is complete, which is defined as the point in time when *both* parties feel the vendor has a sufficient understanding of the prospect's situation, needs, wants, and constraints.

Prospect *champions* may want help convincing their colleagues to pursue a particular vendor's solution (see the section starting on page 282 in the paperback version of *Doing Discovery* for details on enabling your champions). They can use both types of demos, depending on their needs and situation: Vision Generation Demos provide your champion's coworkers with crisp, easily consumable examples of what's possible; Technical Proof Demos share particulars on specific capabilities of interest.

But where do you begin? Is it possible to create a "one-size-fits-all" demo that embraces the interests of all prospect players?

Nope.

Each job title within your prospect typically has different problem sets and desired outcomes, requiring different solutions. Let's use CRM systems as a working example. Your prospect likely has several (or many!) parties interested in determining what the CRM system should do:

- Chief Revenue Officer: Needs accurate forecast and pipeline reporting for new-name customers and renewals/expansions from existing customers.

- Front-line Sales Manager: Needs an accurate forecast for their team, plus insights into reps' strengths and weaknesses to enable coaching.

- Sales Rep: Wants the minimum effort required to enter and update opportunity info.

- Presales Leadership: Wants to see status and timing of opportunity progression from discovery to demo to POC along with opportunity size.

- Presales Practitioner: Needs discovery information to propose precise solutions, prepare live demos, POC success criteria, etc.

- Head of Marketing: Needs to track lead generation, lead progression, conversion, renewals, expansion, and churn.

- Marketing Manager: Needs to build, execute, and track marketing campaigns.

- Sales Operations: Needs to understand and manage territory loading, compensation and quota attainment; also concerned about CRM system "hygiene".

- Sales Enablement: Needs to track onboarding, time-to-effectiveness, implementation and adoption of sales methodology and plays.

- Customer Success: Needs to know the use cases and Value Realization Events for newly closed customers, renewal dates, expansion opportunities, and churn information.

- CRM System Admin: Wants to understand system setup, ongoing administration, permissions, custom report building, etc.

A face-to-face demo to this combined team could easily consume a full day! (Do the math: If you allocate one hour per segment, on average, for eleven players, well, that's a *very* long day!) How could you possibly create a single recorded demo that would engage and satisfy all eleven folks?

Instead, let's divide and satisfy the prospect on a job title by job title basis. Once you have determined your objectives for your automated demos, your next step is to identify your target job titles.

The Menu Approach – Choose Your Own Adventure

(How do you eat an elephant? One bite at a time… But please don't: The elephant won't be very happy when you start to nibble on its knee!)

Intelligent automated demos *start* by asking the prospect for the receiver's job title. Alternatively, you can determine the prospect's job title through traditional pathways.

In either case, this approach is key! It enables the entire balance of the demo to focus on the goals, problems, capabilities desired, and value elements for *that specific job title*.

Here is an example of The Menu Approach in practice. The first "Menu" presents a list of job titles and asks the viewer to choose. This could be done within the automated demo tool itself, if the capability exists (Consensus has done an outstanding job with this) or delivered in a manual or semi-automated fashion by sending out job title-oriented demos individually.

Let's assume our tool supports "slicing" by job title. For our CRM demo example, the tool asks:

"What's Your Job Title?

- ❑ Chief Revenue Officer

- ❑ Front-line Sales Manager
- ❑ Sales Rep
- ❑ Presales Leadership
- ❑ Presales Practitioner
- ❑ Head of Marketing
- ❑ Marketing Manager
- ❑ Sales Operations
- ❑ Sales Enablement
- ❑ Customer Success
- ❑ CRM System Admin"

Now let's play prospect, and assume we are a Front-line Sales Manager for our example. We click that box and the automated demo takes us to a screen that lists 5-7 high-probability challenges, drafted *specifically* for front-line sales managers:

- ❑ Improving Forecast and Pipeline Accuracy
- ❑ Increasing Visibility into Rep Opportunities
- ❑ Identifying and Coaching Rep Strengths and Weaknesses
- ❑ Preparing for QBRs
- ❑ Onboarding New Reps
- ❑ Inspecting and Coaching to Your Sales Methodology
- ❑ Collaborating with Other Regions on Global Opportunities

The is the second use of The Menu Approach, listing areas of potential interest for this job title. The automated tool now asks us to rank each of the 7 items above as "High", "Medium" or "Not Interested" priority. This is a terrific way to:

1. Invite us, as the viewer, to "choose our own adventure",
2. While providing the vendor with very valuable early discovery information.

What a delight! As the viewer, we now make our selections:

High	Improving Forecast and Pipeline Accuracy
High	Increasing Visibility into Rep Opportunities
Medium	Identifying and Coaching Rep Strengths and Weaknesses
High	Preparing for QBRs
Medium	Hiring and Onboarding New Reps
No Interest	Inspecting and Coaching to Your Sales Methodology
Medium	Collaborating with Other Regions on Global Opportunities

Our selections are recorded and the automated demo presents the following:

A 2-3-minute segment on:	Improving Forecast and Pipeline Accuracy
A 2-3-minute segment on:	Increasing Visibility into Rep Opportunities
A 30-second segment on:	Identifying and Coaching Rep Strengths and Weaknesses
A 2-3-minute segment on:	Preparing for QBRs
A 30-second segment on:	Hiring and Onboarding New Reps
Nothing on:	Inspecting and Coaching to Your Sales Methodology

A 30-second segment on: Collaborating with Other Regions on Global Opportunities

Now for the pivotal question: What should be presented in each of these segments?

2-3 Minute Vision Generation Demos

One of the toughest questions in preparing recorded demo segments is already answered for you: How long should demo segments run?

General recommendations suggest:

- 2-3-minutes for “High” ranked items
- 30 seconds for “Medium” items
- And zero for the “Not Interested” items

What can you accomplish in 2-3 minutes? A lot!

Specifically, 2-3 minutes is a terrific length for simple Vision Generation Demos. The specific content can (must!) map to what has already been learned about the prospect. We already know the prospect identifies with “Front-line Sales Manager” as the job title, so each of the segments needs to align to Front-line Sales Manager goals, needs, and potential solutions.

Let’s use “Preparing for QBRs” for our example.

An excellent starting point for this 2-3-minute segment is to establish a connection, based on how you’ve helped other, *similar* front-line sales managers achieve their objectives using your CRM system. A simple slide and/or voice-over could communicate:

> “We’ve helped many other front-line sales managers streamline QBR preparation. They had shared how their reps were often incorrectly assigning opportunity stages and neglecting to update opportunities as changes occurred. Managers frequently had to call reps individually to “get the truth”, then manually create QBR presentation slides to reflect the “real” data. There were often errors in this process that got worse as the year progressed – many managers reported unpleasant EOQ surprises when deals they had counted on didn’t close!
>
> These Front-line Managers said they were looking for some way that the CRM system would “coach” the reps to enter the correct opportunity stages and keep them accurate through time-based prompts regarding changes in opportunity status or playbook steps. Managers also said they wanted “push button” QBR-ready output that showed the opportunities, as well as the confidence of the data expressed as a score.
>
> We provided those capabilities – and our customers report that they are now enjoying 90% or better accuracy of the QBR information they present vs what was previously 50% or worse. They also shared that they have recovered 1-2 FTE otherwise consumed in the process. And, delightfully, they report “no surprises” at quarter end…!”

Great Demo! practitioners will recognize the above voiceover as a verbal delivery of a Situation Slide:

Job Title:	Front-line Sales Manager
Critical Business Issue:	QBR preparation difficult, inaccurate
Problems/Reasons:	Incorrectly assigned opportunity stages; neglected updates; manual process; errors; unpleasant EOQ surprises
Specific Capabilities:	Guided coaching to assign stages; time-based prompts; confidence scoring of rep info; push-button generation of QBR-ready materials
Delta (Value):	Opportunity accuracy improvement from 50 to 90%; recovery of 1-2 FTE annually; “no surprises…!”

A simple version of this slide can be the visual for this part of the 2-3-minute segment. In fact, if you read the full text and time it, you’ll find it consumes just about 1 minute! Now you can use the next 1-2 minutes to share a key screen or two from your software (an “Illustration”), describe it, and recommunicate the value.

Let’s imagine an Illustration screen – here’s the voiceover:

> “What you are looking at here is a slide specifically generated for a QBR, with the key opportunities displayed showing the stages completed, forecasted amounts, and confidence ratings – and all of this information was captured automatically after the system verified the status from your reps through automated coaching and timing prompts.
>
> With these capabilities, our customers report opportunity accuracy improvement from 50 to 90%, recovery of 1-2 FTE annually, and near elimination of those unpleasant EOQ ‘surprises’…!”

The author uses highlighting or annotation tools during the recording process to direct the prospect’s eyes to specific areas of the screen as they are being described.

Total time? 2-3 minutes. That’s your completed “Vision Generation Demo” for that specific Front-line Sales Manager use case.

30-Second Demo Segments

What about the 30-second segments?

You likely have already realized that the “Illustration” portion of the above with accompanying voice-over is the terrific candidate for your content, trimmed appropriately to make the perfect 30-second segment.

This enables effective reuse of your content. Once you’ve created your 2-3-minute segments, you now *also* have the full set of candidates for each corresponding 30-second segment.

(Note: If your tool lacks the ability to differentiate between “High” and “Medium” interest, you can simply use the 2-3-minute segments. The ability to distinguish between interest levels provides you with additional clarity of your prospects’ wants vs needs. It is a delightful way to automate a portion of discovery!)

Congratulations – you’ve completed building one of the seven topics for your Front-line Sales Manager!

Your Vision Generation Library

Returning to the Menu for your Front-line Sales Manager, your next effort is to follow the same process above to complete each Menu item segment:

- ✓ Improving Forecast and Pipeline Accuracy
  - 2-3-minute Segment
  - 30-second Segment
- ✓ Increasing Visibility into Rep Opportunities
  - 2-3-minute Segment
  - 30-second Segment
- ✓ Identifying and Coaching Rep Strengths and Weaknesses
  - 2-3-minute Segment
  - 30-second Segment
- ✓ Preparing for QBRs
  - 2-3-minute Segment
  - 30-second Segment
- ✓ Hiring and Onboarding New Reps
  - 2-3-minute Segment
  - 30-second Segment
- ✓ Inspecting and Coaching to Your Sales Methodology
  - 2-3-minute Segment
  - 30-second Segment
- ✓ Collaborating with Other Regions on Global Opportunities
  - 2-3-minute Segment
  - 30-second Segment

Congratulations, again! You now have a complete automated Vision Generation Demo for your Front-line Sales Manager. Send it out!

Now, rinse and repeat.

Create Menus and segments for each of the job titles you choose to include at the top level of the hierarchy. In our CRM example, that's 11 job titles mapping to 11 Menus and perhaps 5-7 Menu items for each Menu, assuming your CRM offering has capabilities that span this range of job titles.

Doing a little math, 11 job titles x 6 Menu Items yields between 132-198 minutes of overall demo (at 2-3 minutes per segment). That's a bit over 2-3 hours. This shouldn't be a surprise – after all, if you simply recorded your traditional end-to-end "overview" demo for these same job titles, you'd have a demo that runs 11 hours!

BUT (and this is a *big* but): Your automated demo now maps *precisely* to the needs and interests of your prospects. That's a HUGE advantage for your prospects and an equally huge advantage in terms of the discovery information you collect as the vendor. You'll learn which Menu items they are interested in, along with their High-Medium-No ranking, whether they watched the full segment, whether they forwarded the demo to others, and more. Delightful!

Finally, include your call-to-action. For prospects who are Just Browsing, you'll want to offer the following options (in addition to "Share with a Colleague"):

1. "Keep me informed": This option moves the prospect into your nurture or trickle marketing program, keeping the prospect lightly engaged until they move into an Active Buying Process.

2. "Connect me with a Solution Consultant" (or other presales title): Offered by some (forward-thinking) organizations, this enables an early discovery conversation to take place, potentially providing the prospect with additional insights and a bias towards your strengths, and enabling you to establish a richer relationship early in the process (which predisposes the prospect to return to you vs other vendors who did not engage).

3. "Connect me with a Salesperson": Your prospect may have been sufficiently convinced by your demo to activate a buying process – well done!

Congratulations – your automated Vision Generation Demos are now complete! They are perfect for Use Cases 2 and 3, and likely 5, as well:

2. I'm early in an active buying process and need to understand which vendors to explore.

3. I need to get a deeper understanding of each vendors' offerings.

5. I need something to help me communicate and sell internally.

Vision Generation Demos are designed to provide *just enough* information to satisfy your prospects' desire to understand what is possible, and then to enable (and encourage) a discovery conversation to take place.

A Subtle Rescue for You

We've just outlined automated Vision Generation demos for 11 job titles. Do you need to have all 11 completed before you release your automated demos?

Nope.

You can begin releasing as soon as you have your most important job titles completed. As you finish recordings for additional job titles, you simply add them to the existing framework.

Why – What – How: A Hierarchy

When you begin to prepare your own automated demos, you'll need to be clear on the answers to these three questions for each prospect job title:

- *Why* is your prospect looking for solutions? These are the goals and objectives that they need to achieve and, in particular, those goals and objectives that are at risk. In Great Demo! methodology, these are Critical Business Issues.

- *What* solutions and deliverables (in particular!) is your prospect looking for? These are the reports, alerts, and workflows that are the deliverables which enable your prospect to solve their problems. Each of these needs to be communicated along with the associated value they bring to your prospect. In Great Demo! methodology, this is the tangible Delta or value.

- *How* will your prospect use your software to deliver the results they need? These are the specific steps needed to execute workflows, generate reports, address alerts, etc.

Your Menu items align with your prospects' *Why* questions: Why is your prospect looking at CRM systems? For example, as a Front-line Sales Manager prospect, they may need:

- ✓ To Improve Forecast and Pipeline Accuracy
- ✓ Better Visibility into Rep Opportunities
- ✓ To Identify and Coach to Rep Strengths and Weaknesses
- ✓ Etc.

The Great Demo! Situation Slide voiceover descriptions and Illustration screenshots show *What* good things your software can provide to help your prospects solve their problems. These are the deliverables and associated benefit statements that tie your offering to the value it delivers for each prospect job title.

For prospects who are deeper into their buying processes, their typical next requests are to see *How* your software actually works. For our CRM example, prospects will likely want to understand specific elements of your offering's workflows, reports, and alerts:

- How hard is it to use?
- How do I enter a new opportunity?
- How do I update opportunities?
- How does it alert me to take action?
- How do I customize the views?
- How do I run reports?

This is where we move from Vision Generation to Technical Proof automated demos – or rather, automated demo segments.

Automated Technical Proof Demos

Today, nearly all Technical Proof Demos are delivered live by customer-facing staff. Initially, I expect that automated Technical Proof Demos will supplement live delivery for the following scenarios:

- ✓ Post-live demo follow-up items (e.g., "We weren't able to show you XX during the demo, so here is a recording of that capability…").
- ✓ Supporting POCs, POVs, and other evaluations, where certain Specific Capabilities need to be demonstrated repeatedly across multiple players or prospects. This may be a terrific opportunity for automation!
- ✓ Providing champions with proof points for specific functionality to share with their colleagues.

I'll make no strong predictions about how this might evolve, but I will suggest that as organizations improve their discovery processes and achieve repeatable structured approaches, the ability to generate automated Technical Proof Demos that align with discovery output will appear and progress!

Now, let's look at how to include the right content for your automated Technical Proof Demos.

Your objective is to provide *just enough* recorded demo to satisfy your prospect's desire to understand how tasks are completed, *not* to deliver an exhaustive (and exhausting!) list of all possible capabilities.

Accordingly, your automated Technical Proof Demo segments should be structured as follows:

1. Describe the scenario and the challenge (Great Demo! Situation Slide format is delightful for this!)
2. Present the end result (the Illustration) and the associated value
3. Record driving your software:
    a. Begin at a logical starting point
    b. Proceed using the *fewest number of clicks or steps* to reach the end result
    c. Summarize

Resist the traditional urge to show all of the "If" and "or" cases. Your job is to make your software look easy to use. Every additional click and option you include will make it look more complicated and increases the risk of "buying it back".

How long should these demo segment run? As Abraham Lincoln said, when asked how long his pants were, "Just long enough to reach the ground…" The same principle applies for Technical Proof Demos: They should take only as long as needed to complete the task.

Could that be a single click? Yes, absolutely. That's powerful stuff!

What if the workflow takes 15 minutes to complete, without side journeys? Then 15 minutes it is. Most of us who create these recordings need to constantly remind ourselves to stick to the *fewest number of steps* to complete the task!

Think in terms of *being* the actual customer and using the software on regular basis: You follow the fastest, most efficient route to complete the task. *That's* what you show in your recorded segment.

You should also plan to include call-to-action options for your automated Technical Proof Demos:

1. "This is exactly what I needed – no further action is necessary."

2. "I'd like to share this with a colleague."

3. "I still have questions, please contact me to discuss."

These enable a brief dialog to take place, giving you and your prospect closure or defining next steps.

Discovery?

Earlier, I noted that Technical Proof Demos are done *after* discovery is complete. Traditionally, these are delivered live, but when you find that prospects ask the same questions over and over, it may be wise to develop automated Technical Proof Demo segments to enable your sales process and your prospect's buying process to move forward asynchronously, without the need to set live meetings.

If you have created these segments and have them available, you can *bias* your discovery conversations towards the use of these assets. For example, "Dear prospect, would you like to see how easy it is to enter a new opportunity in the system? I can send you an automated demo that you can review at your convenience…"

Automated Demo and Recording Tools

There are a wide variety of tools available today for recording and hosting your Automated Demos, including Arcade, Camtasia, Cloudshare, Consensus, DemoBoost, DemoDesk, DemoEasel, Demoleap, Demostack, Demostory, DemoTime, EasyUser, folio, Heropa, HowdyGo, Instant Demo, Instruqt, Lancey, Loom, Navattic, Omedym, Regale, Reprise, Saleo, ScreenPal, ScreenSpace, SmartCue, Snackwyze, Storylane, StoryScale, Supademo, TestBox, Tolstoy, Tourial, Walnut, and many others. Some of these provide simple recording, editing and playback capabilities; others offer some elegant refinements, such as mouse motion smoothing; and several provide a much richer environment for prospects to experience your software for themselves.

Assess your objectives and define your requirements, needs, and wants. I'd suggest that the more discovery information you can gain about your prospects' interests through the use of the tool should be a high priority!

The Automated Demo marketplace is evolving rapidly, and it is likely that new vendors will appear before you finish reading this article! And, of course, the existing vendors' tools will also be changing and improving nearly every day. (This is largely why this article was *not* incorporated into the Third Edition of *Great Demo!*)

Personal recommendations? I'm a big fan of the approaches taken by Consensus and Saleo.

Reusability and Maintenance

Remember the bad old days when you (or your predecessor) recorded an hour-long "overview" demo? For some folks, it took multiple takes due to pathway mistakes or voiceover flubs, and remember how relieved you were when the behemoth was finally done?

Now remember how you felt a week later when newly released features made your recording *obsolete*? Arrrrgh!

The bad news is that this will *still* happen with Automated Demo tools, but the good news with the approach in this article is that you should only need to update a few 2-3-minute segments rather than a full 60-minute production!

Style vs Substance

How well “produced” do your recordings need to be? Simple yet clear, authentic recordings are preferred by prospects and customers. Heavy production with professional voiceovers, custom animation and choreographed music will delay release and make maintenance much more challenging.

Presales folks are often the best “performers” for automated demos. They are already well-practiced in delivering demos, they know the software and likely also know the use cases well.

Some additional recording recommendations include:

- Speak clearly and deliberately
- Use “universal” English (or other local language), avoid colloquialisms
- Put some “personality” into the recordings
- Mouse smoothly and deliberately when driving your software
- Use the annotation capabilities in the recording tool to “point” and highlight screen elements

Activation Energy – and Payoff

In the world of chemistry and physics, “Activation Energy” is the input energy required to start a reaction, but once kicked-off the reaction then (generally!) proceeds on its own.

Generating your library of Automated Demo recordings is a major project. It requires investing time and energy to define your plan, reach agreement with colleagues, execute the recordings, deploy, and track. It also requires an ongoing commitment to keep your library up to date as new capabilities emerge from development and others change.

This Activation Energy is typically repaid many (many!) times over through the amplification effect that your library enables. Each Automated Demo consumed by your prospects represents one more “overview” or “Harbor Tour” demo that you don’t have to deliver! (Time for a small, but significant “happy dance”!)

Software presales teams know that typically 30-50% of the demos they deliver live are often “wasted”, resulting in expensive unproductive sales process and No Decision outcomes. That’s a *lot* of waste. Automated Vision Generation Demos can dramatically reduce the time traditionally consumed by these activities. Similarly, a library of Technical Proof Automated Demos can release you from repetitive post-discovery live demo meetings.

A Final Word

“Conversation”.

A pundit (OK, me) once noted that “You cannot have a conversation with a book”. The same is generally true for Automated Demo tools. As these tools improve and evolve, I would bias my choice of tools towards those that enable some forms of asynchronous conversations. The “Choose Your Own Adventure” approach (e.g., Consensus) and tools that offer feedback mechanisms are preferred, accordingly!

When you *want* to have a conversation during a demo, set up a live meeting to enable the conversation to take place. Note that you can apply a hybrid approach, where an automated demo is shared, *and* a live vendor representative is available for human-to-human interactions. Your sales and presales playbooks and motions should provide guidelines as to when to apply a tech-touch, low-touch or high-touch tactic, accordingly. It is also likely that AI integration into Automated Demo tools will begin to offer conversations soon, as well!

In summary, for Just Browsing and early Active Buying Process prospects (Use Cases 1 and 2, in particular), Automated Demos provide prospects with simple, low-risk methods of exploring possible solutions. For Active Buying Process who are in further into their journeys, (Use Cases 3, 4, and 5) Automated Demos offer options to address specific questions, sell internally, and compress cycles.

Now it's up to you. Reach out to the Automated Demo vendors and see if they "drink their own champagne", using their own tools to engage…!

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 share your experiences and learn from others.