

ENHANCING YOUR DEMO PROCESS Worksheets

CHECKING IN



Use this
worksheet to
map out when
and how you will
check in with
your prospect
during your
demo.

How do you usually start a demo?	Which of these do you already do as part of your demo process?
	 ☐ Meaningful check-ins. ☐ Keep a tally of their responses so that you know if they are leaning in or leaning out. ☐ End your demo by asking them if they are leaning in or leaning out and what their thoughts are about the solution based on what they saw today.



There are a number of points during your process where you can stop and check in with your prospect. Make a note of when these are, and come up with questions that will help you understand the prospect's needs and position your solution in a positive light.

WHEN WILL I DO A MEANINGFUL CHECK- IN?	WHAT WILL I ASK THEM?



Use this worksheet to map out when and how you will check in with your prospect during your demo.

How will you check-in at the end to get a sense of whether they are leaning-in or leaning-out, and what their thoughts are about your solution? Can you plan to do this before you present pricing?



ENGAGING YOUR PROSPECT



Use this
worksheet to
determine how
you will engage
with everyone on
the call.

Think back to your last 3 sales calls, did you make an effort to engage with every person on the prospect's side?

Who do you typically focus on during a call? The decision-maker(s), the person who talks the most, or your Champion?



Use this
worksheet to
determine how
you will engage
with everyone on
the call.

What are some ways you can invite people into the discussion in a way that isn't awkward?

What else can you do to make sure that you engage with each person on the call?



CHECKING YOUR POWERPOINT



Use this
worksheet to
guide you towards
more engaging
presentations with
fewer PowerPoint
slides.

What are your feelings
about PowerPoint
presentations when you are
the person in the audience?

How do you think your prospect feels about them?



Use this
worksheet to
guide you towards
more engaging
presentations with
fewer PowerPoint
slides.

Do you think a PowerPoint presentation is the BEST way to demonstrate your solution?

If yes, then what slides do you absolutely have to have as part of your presentation and when can you include those slides?



Use this
worksheet to
guide you towards
more engaging
presentations with
fewer PowerPoint
slides.

If no, then how can you make your presentation super engaging by using a mix of slides, video AND engaging conversation?

How can you make your presentation resonate more with your prospect?



SCREEN SHARING



Use this
worksheet to
understand
screen-share do's
and don'ts during
your demo.

What tabs do you need to have open during a demo?	
What applications do you need to have open?	
What notifications and software alerts do you need to put on silent mode?	
What magnification do you need to display documents at in order for the prospect to see them clearly?	



Use this
worksheet to
understand
screen-share do's
and don'ts during
your demo.

Think about your desktop - what impression does it give the prospect?	
How will you check in to make sure everything is clear and visible to your prospect?	
Consider your desktop wallpaper - is it professional?	
What about your screensaver?	



HANDLING QUESTIONS



Use this worksheet to map out how you can handle a prospect's question.

What are some ways you can "Tie it up with bow"?

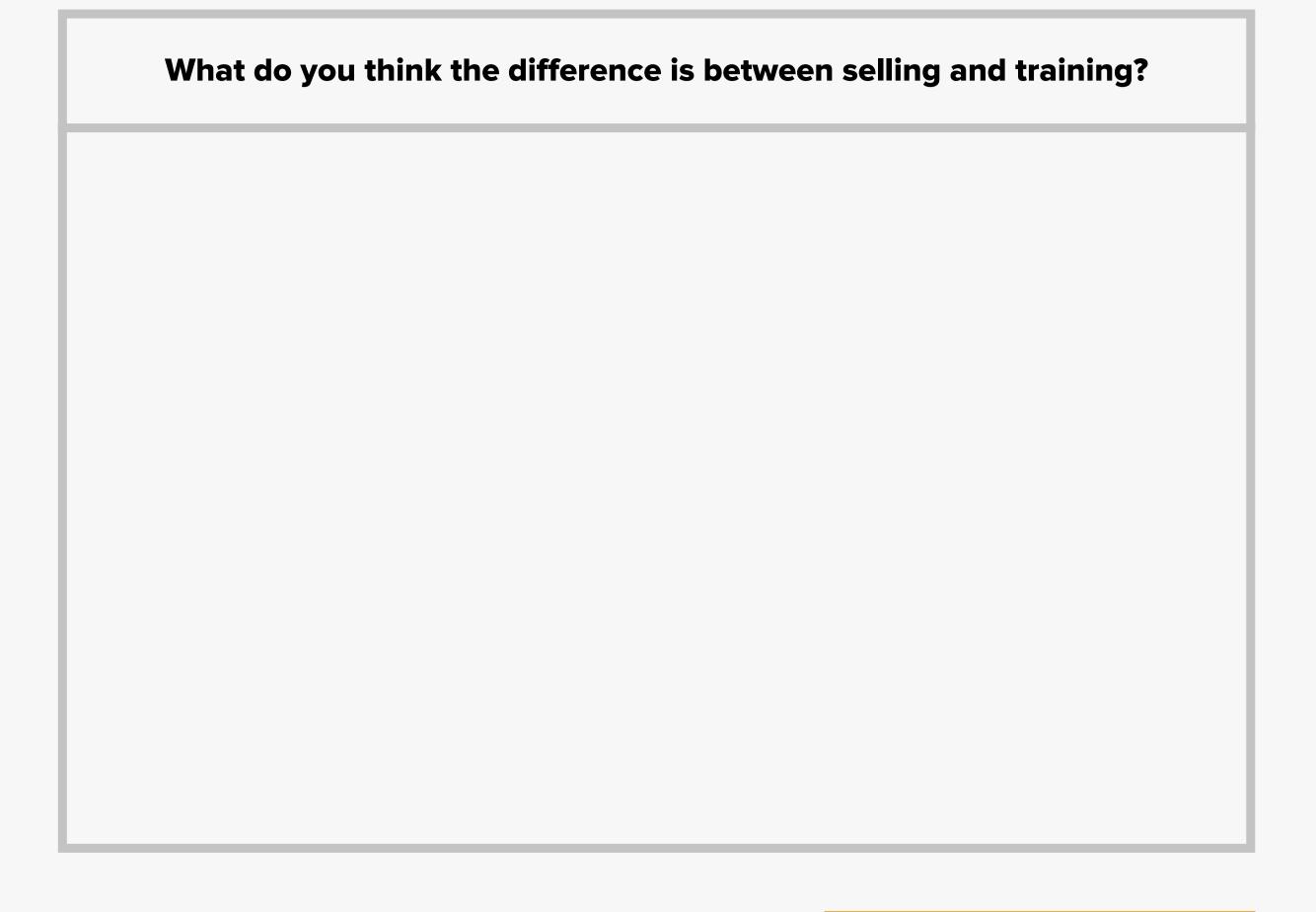


ARE YOU SELLING OR TRAINING?



Use this worksheet to identify where you should be selling and where you should be training during your Demo.

•





Break your last 3 calls down into 30-second segments and answer the following questions for each segment.

	WAS I SELLING OR TRAINING	WHAT DID I ACTUALLY NEED TO DO?
Call 1		
Call 2		
Call 3		

•



TALKING THROUGH A CUSTOMER LENS



Try to write statements you often find yourself using during a demo. And rewrite each of these statements through the lens of the customer.

SALES REP LENS	CUSTOMER LENS
I think	
I feel…	
I like	
This is my favorite feature…	
This gets me really excited	
This is the best part…	



ADJUSTING YOUR TONE AND CADENCE



Use this worksheet to help you get more clarity on your tone and cadence and on how you can use both to maximum effect during your demo.

How confident do you typically feel on a sales call?	□ Very confident□ Somewhat confident□ Not confident at all
What are some ways you can center yourself and bring yourself back to a confident place, especially if things are going off track?	
In terms of your tone and cadence, what should you do if a prospect gets a little heated, upset, or it feels like they are attacking you? (protip: remain calm, don't argue, de-escalate and move on)	



COMPARING YOUR SOLUTION



Use this
worksheet to
explore different
ways to ask your
prospect how your
solution compares
with other
solutions they are
evaluating.

What are your hesitations when it comes to asking your prospect about how your solution compares with other solutions they are evaluating?

Write down three ways you can ask prospects how your solution compares to their current solution.



Use this
worksheet to
explore different
ways to ask your
prospect how your
solution compares
with other
solutions they are
evaluating.

Write down three ways you can ask prospects how your solution compares to other solutions they are evaluating.

List three to five points in time, during your demo process when you can likely most naturally ask prospects these questions.



EDUCATING YOUR PROSPECT



Use this
worksheet to help
you position
yourself as the
expert in your
prospect's eyes

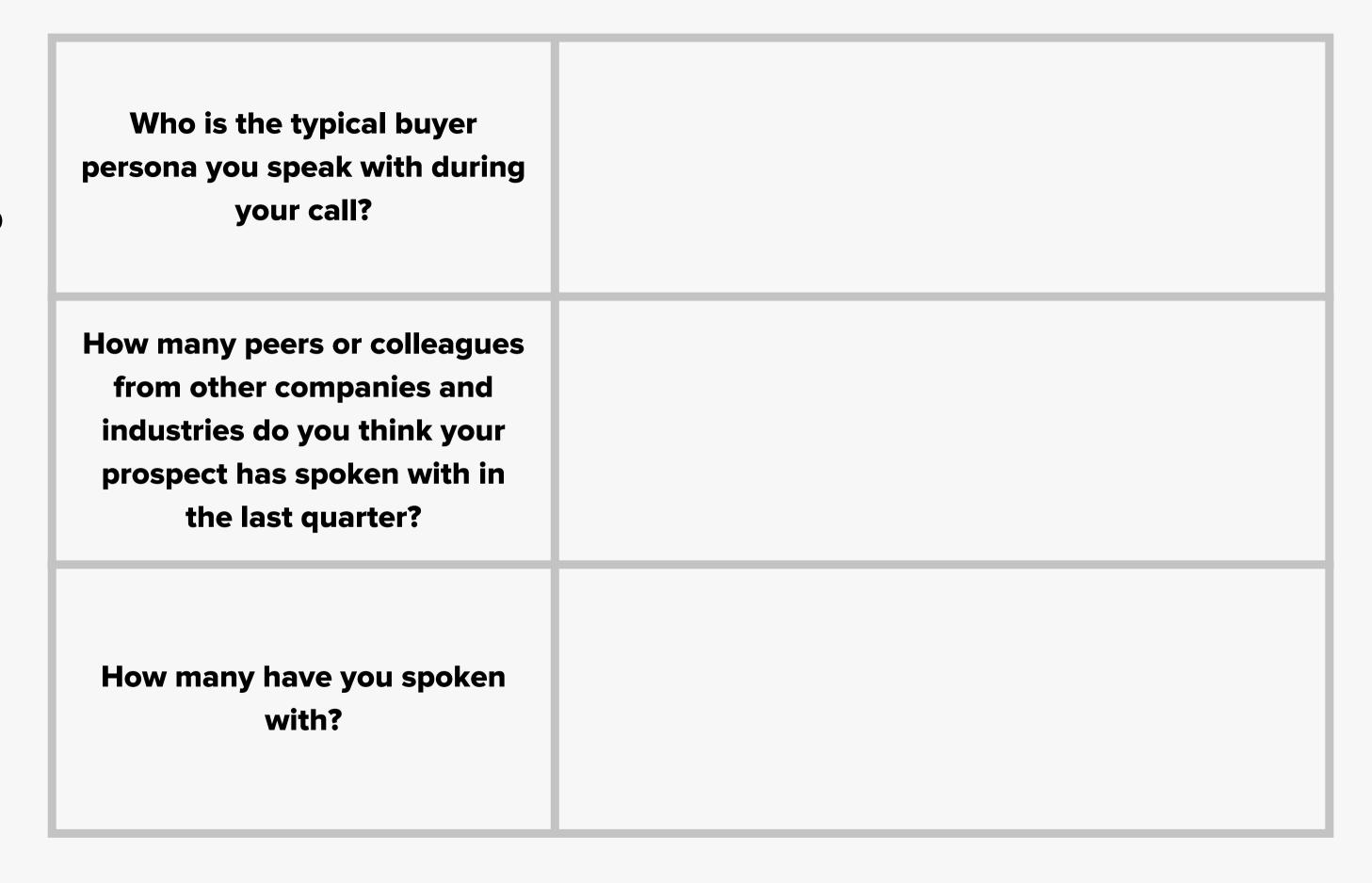
What are 3 industry
benchmarks can you share
with your prospect that they
might not be aware of already?

What are 3 internal benchmarks you can share that they are not privy to, that educate them, and allows them to learn something?

What Customer Story
Soundbites can you share that
function as mini case studies of
what customers have done?

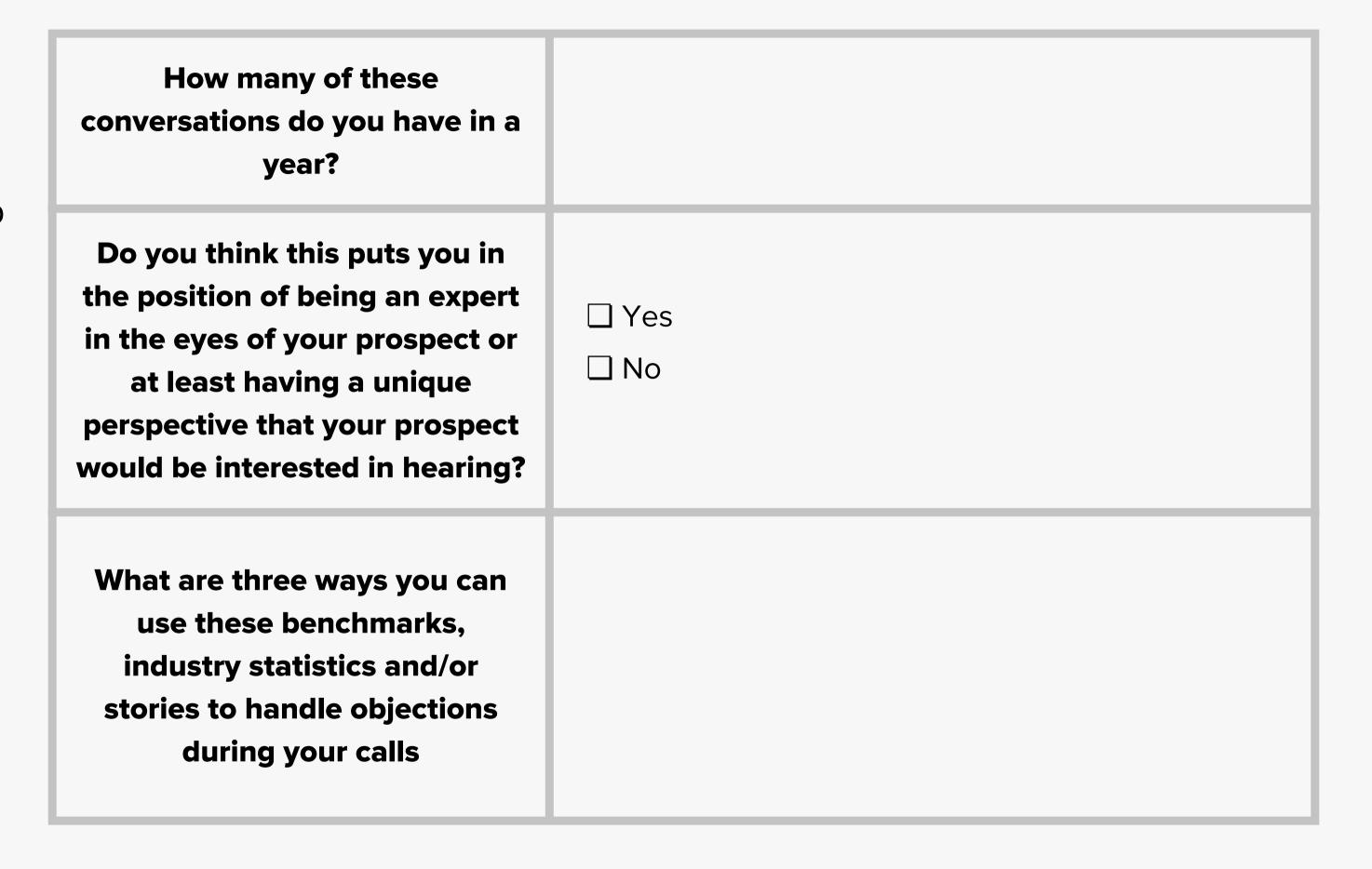


Use this
worksheet to help
you position
yourself as the
expert in your
prospect's eyes



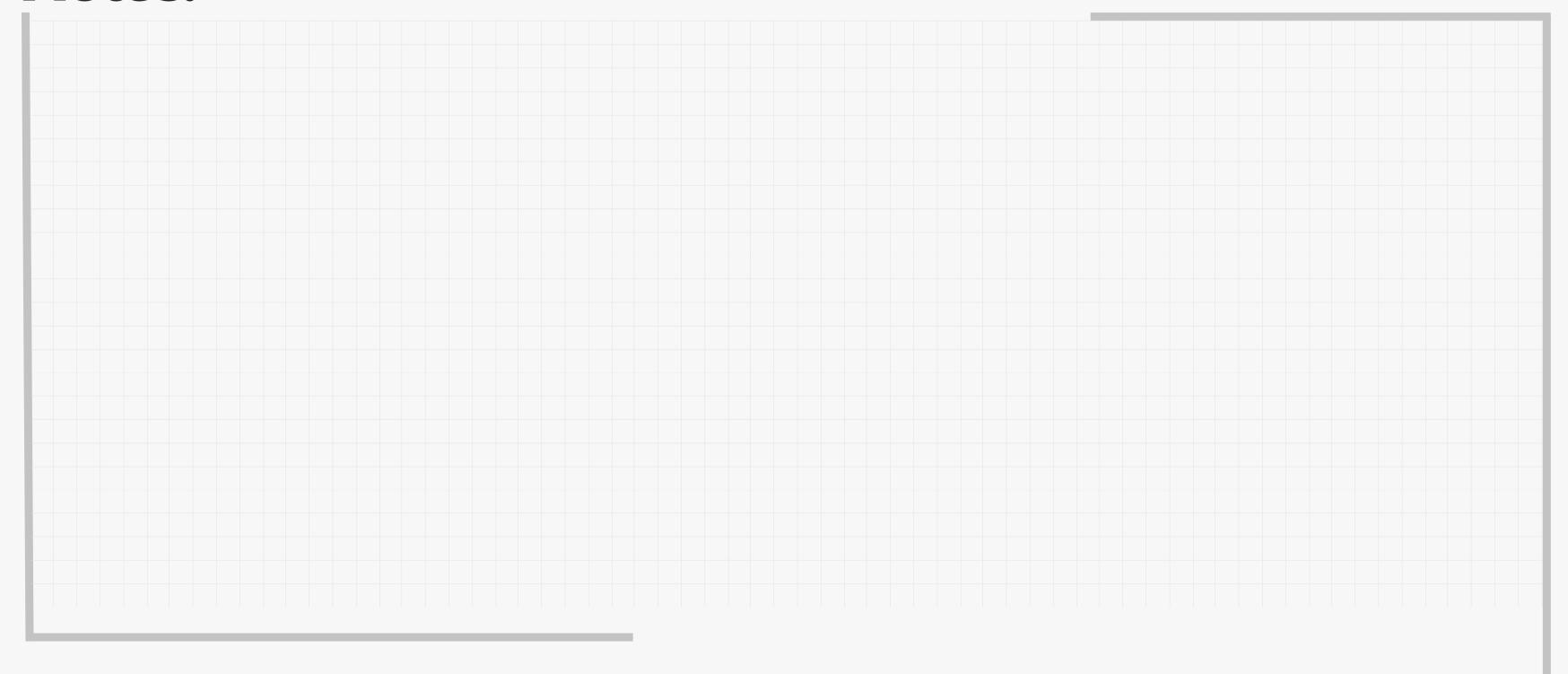


Use this
worksheet to help
you position
yourself as the
expert in your
prospect's eyes





Notes:







Looking to increase your sales numbers?

We help SaaS and B2B companies achieve Faster & Predictable Revenue Growth using a scientific approach.

Click below to schedule a free Growth Audit Session.

It would be my honor to help you scale your company faster.

BOOK A FREE GROWTH SESSION NOW