



ENHANCING YOUR DEMO PROCESS Worksheets

[Click here to go to the article with details on how to use this worksheet.](#)

CHECKING IN



Instructions:

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? |
|----------------------------------|--|
| | <ul style="list-style-type: none"><input type="checkbox"/> Meaningful check-ins.<input type="checkbox"/> Keep a tally of their responses so that you know if they are leaning in or leaning out.<input type="checkbox"/> 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. |



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Instructions:

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? |
|---------------------------------------|-----------------------|
| | |



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Instructions:

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

Instructions:

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?

Instructions:

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

Instructions:

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?

Instructions:

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?

Instructions:

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

Instructions:

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? | |

Instructions:

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

Instructions:

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

| What do you do when a prospect asks you a question? | What are some ways you can “Tie it up with bow”? |
|--|---|
| <ul style="list-style-type: none"><input type="checkbox"/> Ignore it<input type="checkbox"/> Answer it<input type="checkbox"/> Answer it and then tie it up with a bow | |

ARE YOU SELLING OR TRAINING?

Instructions:

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

What do you think the difference is between selling and training?

Instructions:

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 | | |



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TALKING THROUGH A CUSTOMER LENS

Instructions:

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 |
|---|---------------|
| <p>I think...</p> <p>I feel...</p> <p>I like...</p> <p>This is my favorite feature...</p> <p>This gets me really excited...</p> <p>This is the best part...</p> | |

ADJUSTING YOUR TONE AND CADENCE

Instructions:

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.

| | |
|--|--|
| <p>How confident do you typically feel on a sales call?</p> | <p><input type="checkbox"/> Very confident</p> <p><input type="checkbox"/> Somewhat confident</p> <p><input type="checkbox"/> Not confident at all</p> |
| <p>What are some ways you can center yourself and bring yourself back to a confident place, especially if things are going off track?</p> | |
| <p>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? (pro-tip: remain calm, don't argue, de-escalate and move on)</p> | |



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COMPARING YOUR SOLUTION

Instructions:

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.

Instructions:

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

Instructions:

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?



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Instructions:

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

Who is the typical buyer persona you speak with during your call?

How many peers or colleagues from other companies and industries do you think your prospect has spoken with in the last quarter?

How many have you spoken with?



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Instructions:

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

| | |
|---|---|
| <p>How many of these conversations do you have in a year?</p> | |
| <p>Do you think this puts you in the position of being an expert in the eyes of your prospect or at least having a unique perspective that your prospect would be interested in hearing?</p> | <p><input type="checkbox"/> Yes <input type="checkbox"/> No</p> |
| <p>What are three ways you can use these benchmarks, industry statistics and/or stories to handle objections during your calls</p> | |



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Notes:

A large rectangular area filled with a light grey grid pattern, intended for taking notes. The grid is enclosed by a thin grey border.

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