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PREPARING FOR THE DEMO

Worksheets

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

TECH CHECKLIST

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Instructions:

Use this worksheet to help you set up your tech for both remote and in-person meetings.

If you are hosting a remote meeting:	If you are hosting an in-person meeting:	For both:
❑ What are the dial-in or Zoom details for both the prospect and your team? ❑ Have you sent clear instructions on how to log in to both the prospect and your team? ❑ Have you verified that everyone has a stable internet connection? ❑ Is there anything else you need to share or check with the prospect? ❑ Is there anything you need the prospect or your team to have, tech-wise? If so, what and when will you communicate that to them?	❑ Reach out in advance and understand what you need to know about the meeting room (and show up early to set up). ❑ What connectors and dongles/cables will you need? ❑ Is there a TV or a projector? What do you need to connect to it? ❑ How do you access their internet or WiFi? ❑ Is there anything else you need to have in terms of setup? If so, when will you let them know?	❑ Is your team ready to go? ❑ Is your computer charged and ready? ❑ Do you have all the software and tabs you need open and ready to share?

SUPPORTING MATERIALS CHECKLIST

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Instructions:

Use this worksheet to think through all the supporting materials you might need for your meeting.

PRINTED MATERIALS	ON YOUR COMPUTER (in Tabs or PowerPoint)

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PROSPECT RESEARCH

Instructions:

Use this sheet to capture anything new and noteworthy about your customer that might add value to the conversation.

Google your prospect's organization and make a note of anything interesting that comes up:

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Instructions:

If you are selling a technology solution, then take a look at your prospect's current tech stack. What inferences can you make from that? Is there anything you can use as part of your conversation with them?

THEIR CURRENT TECH STACK	HOW WE CAN HELP

LINKEDIN RESEARCH CHECKLIST

Instructions:

Make a list of everyone who will be attending the meeting from the prospect's side. Review their LinkedIn profiles and document what you find.

NAME	TITLE & ROLE	LOCATION	BACKGROUND	OTHER USEFUL INFO

ADAPTING YOUR STYLE

Instructions:

Use this worksheet to think through the title and personality of your prospect so you can adapt your style accordingly.

WHO IS ATTENDING?			
WHAT LEVEL ARE THEY AT?			
HOW CAN I ADAPT MY STYLE TO MEET THEM WHERE THEY ARE?			

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SUCCESS STORIES CHECKLIST

Instructions:

Go through your CRM and marketing materials to see if you can find relevant customer stories to share with your customer/prospects.

CURRENT CUSTOMERS	HOW WE ARE WORKING WITH THEM

Which of these customers might your customer/prospect be familiar with?
What stories or case studies can you share with your customer/prospect? What does each story or case study illustrate?

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Instructions:

Go through your CRM and marketing materials to see if you can find relevant customer stories to share with your customer/prospects.

STORY	WHAT THIS ILLUSTRATES (pain it addresses and outcome achieved)

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DISCOVERY QUESTIONS

Instructions:

Use this space to write down all the discovery questions you might want to ask a prospect on a call. Make sure you circle or highlight the key questions that you absolutely must ask on every call.

DISCOVERY QUESTIONS

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STUDY YOUR COMPETITORS

Instructions:

Use this worksheet to gather intel on your competitors before meeting with your prospect.

COMPETITOR		
THEIR CURRENT SOLUTION		
HOW ARE WE DIFFERENT AND BETTER?		
WHY CUSTOMERS PICKED US OVER THEM?		
IN WHAT AREAS ARE WE WEAKER?		
WHAT BENEFITS CAN WE BRING TO OVERCOME THIS DRAWBACK?		

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PREPARING FOR OBJECTIONS

Instructions:

Use this worksheet to identify the main questions or objections you might get from various stakeholders within your prospect's company.

BUYER PERSONA	LIKELY QUESTION OR OBJECTION	BEST ANSWER

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ADDING VALUE TO THE CALL

Instructions:

Use this worksheet to map out how you can add value with insights on the call.

CUSTOMER BENCHMARKS	HOW CAN THIS ADD VALUE?	INDUSTRY BENCHMARKS	HOW CAN THIS ADD VALUE?

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ORGANIZATION CHART

Instructions:

Use this worksheet to draw out your prospect's org chart. Remember to keep adding to this chart as you navigate through each step of the call and sales cycle.

How can you forge as many key relationships within the organization as you can?
How can you make sure key individuals in their organization are properly aligned with your Exec. Team, your internal team members (i.e., their security person with your security person), as well as yourself?

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IDENTIFY YOUR CHAMPION

“Champion” - that person who is “sold” on your solution, and can help navigate the internal structure and decision-making process at the prospect’s organization and help lobby for a successful outcome.

Instructions:

Use this worksheet to identify your Champion.

Answer these questions:
• Who is your champion? • What is their role in the company? • Why do they make a good champion? • What can you do to build your relationship with them? • What do you need from them in order to close the sale? • What do you need them to know about you, your company, and your solution in order to help you navigate the sales call successfully?

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CHAMPION PRE-CALL MEETING CHECKLIST

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Instructions:

Use this worksheet to plan out your pre-call meeting with your Champion.

Have you identified your Champion?	❏ Yes ❏ No
Do you need to touch base with your Champion before your next big call with the broader team?	❏ Yes ❏ No
When will you touch base with them?	
For how long?	
Where? Video Conference? Phone?	

Instructions:

Use this worksheet to plan out your pre-call meeting with your Champion.

Use this space to plan out what you want to cover with them:	
Desired meeting outcome:	
Purpose of the meeting:	
Agenda:	

Instructions:

Use this worksheet to plan out your pre-call meeting with your Champion.

Any pre-work that can help the meeting go smoother?	
How can you best utilize the time on your next call?	
Any questions or details you want to ask them or share with them?	

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SETTING THE RIGHT TONE

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Instructions:

Create your own pre-call checklist of everything you need to do in order to ensure things start off on the right foot with your prospect. Remember, you want to keep adding to this as you watch each lesson in this module.

What tone do you want to set with your prospects from the very first meeting?

Notes:

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