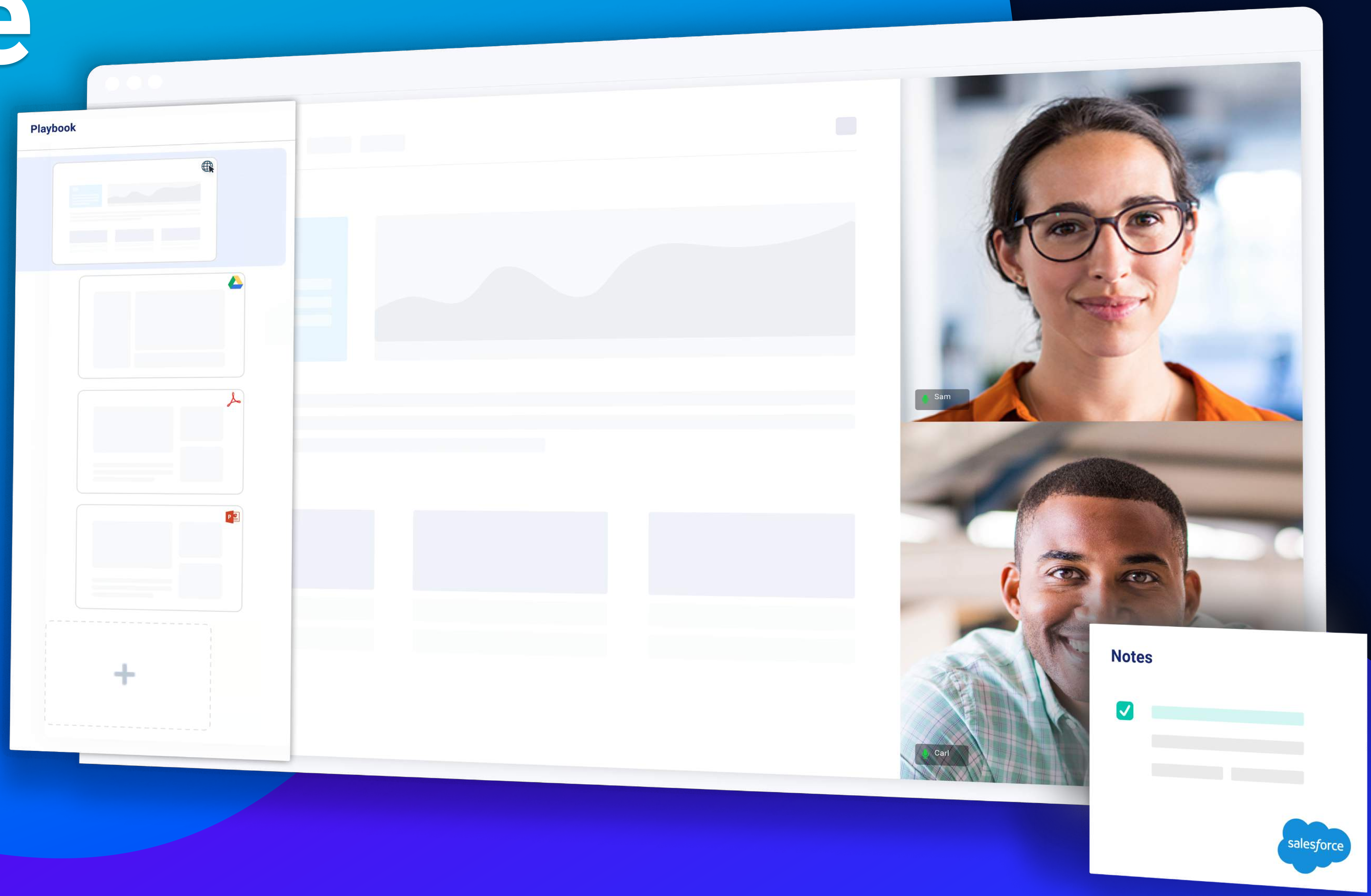
Demodesk

# The 2021 Product Demo Guide

- Schedule
- Demo
- Convert
- Scale




## Building Top Performing SaaS Sales Machines

# Introduction

Schedule. Demo. Convert. Scale. Those are the four most important words for SaaS sales leaders. Get these four processes right and you'll be the hero at your company. Fail to deliver and you might be looking for a new job.

If you're managing sales reps, your job at its core is to make sure that they're effectively scheduling meetings, running great demos, and converting prospects into customers. More importantly, you're also in charge of scaling those functions to enhance revenue growth.

This ebook is for sales leaders who want to build scalable, repeatable sales machines. You already know how to sell, so we're not going to cover any basics like "What is a demo?" Instead, we'll give you step by step instructions for **implementing scalable sales processes for demos**.

The processes we'll cover ensure that your team is selling as effectively and efficiently as possible. They make sure that leads don't fall through the cracks. They work together to create a system that is repeatable and scalable.

The ebook has three chapters: Schedule, Demo, and Convert. Each chapter starts by covering key information that you need to have a grasp on and communicate to your sales reps. Part two of each chapter covers how you can implement and scale these processes.

By the end of this guide, you'll have clear instructions for building a high-output sales machine that can schedule, demo, convert and scale. It's not just theoretical either. Our customers have been using these techniques to increase bookings, shorten sales cycles, and close more deals.

Happy selling!

*Veronika Riederle*
*CEO and Founder, Demodesk*

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Chapter 1

# SCHEDULE

# How to Effectively Schedule Demos

"How many demos have we scheduled for this week?" As a sales leader, you probably ask yourself that question constantly.

You understand that the number of demos scheduled is a leading indicator for the number of deals closed. But how much thought have you given to the actual mechanics of scheduling those demos? Have you fully optimized that process and trained your team on it?

In this chapter we'll cover important scheduling related topics that your sales team needs to understand and walk you through the processes that you can implement to optimize demo scheduling.

## Scheduling: How to Pick the Right Date and Time

If you can, schedule the demo while you are still on the sales discovery call. Before you ask for your prospects' availability, give them the scheduling guidelines below to ensure that you are controlling the timing, even if they think they are picking the date and time.

If you can't lock down a date for the demo during the discovery call, send the prospect an email 15 minutes after the call with a booking link from your scheduling software.

**Do it right away**
Within 5 business days of your call

**Ask for a 30 to a 45-minute slot**
Keep it short and follow your agenda

**Choose the right time of day**
Schedule on Monday-Thursday between 3pm-5pm

**Schedule in the right time zone**
Use a tool that takes time zones into account

**Avoid Monday morning and Friday afternoon**

## How to invite key decision makers

Minimize the number of demos you have to do by getting the right people on the first demo. You should do everything in your power to get the decision-makers to attend the demo meeting. If you've received a confirmation for a prospect, but they do not have buying authority, ask that person to invite one of their colleagues.

For example, if you know this person is worried about their team adopting the platform, invite a Customer Success Manager to the demo so they can help the prospect understand the post-purchase experience. Or, if you know that you're speaking with a CTO or highly-technical prospect, have a Sales Engineer attend the demo to speak to the more technical aspects of the demo.

Don't just hope they RSVP. Offer an extra incentive to motivate the right people. One suggestion is to let them know that you will have special guests attending specifically to answer the questions posed by that stakeholder.

## How to avoid no-shows

While there's no special magic dust to ensure your prospects will show up, we have seen no-show rates decrease by over 50% when appropriate reminder emails are sent.

Not all reminder emails work. Here are the best practices to the best reminder emails.

1. Always send during work hours, 24 hours before the demo.
2. Personalize as much as possible. An online meeting tool can help by sending emails based on custom rules.
3. Remind prospects of the meeting time & reinforce the value of the demo with case studies, articles, etc.
4. Include the demo meeting agenda & goals so that your prospects know what to expect during the call.
5. Make it easy for everyone to reschedule by coordinating everything through a master calendar.
6. Last but not least, we recommend ALWAYS being friendly but professional.

# Automate Scheduling

And free up more time to close the #deal



## How to automate your scheduling process

The perfect demo scheduling process makes life easier for both your prospects and sales reps. It not only helps sales teams schedule at a high velocity but also helps set those demos up for success by relieving friction, providing clarity and minimizing the risk of no-shows.

Most of the processes we'll show you can be automated or made easier by a variety of different tools or an all-in-one online meeting platform like Demodesk. You might be able to set up similar processes with tools in your sales stack, but since we're most familiar with our platform, we'll use it as an example.

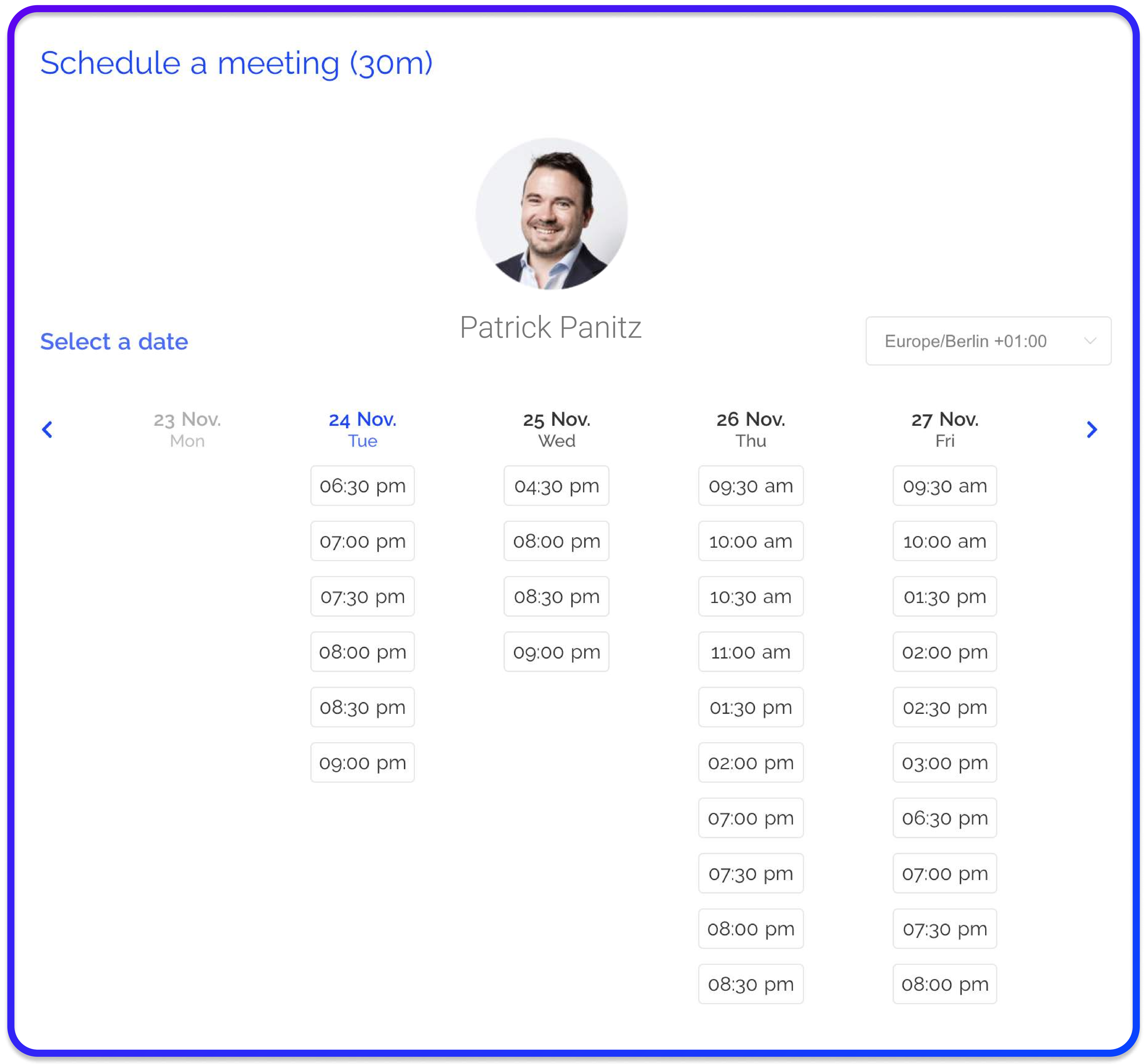
## Automate meeting scheduling with real-time calendar sync

You might be surprised at how many sales teams still use back-and-forth emails to try and nail down a demo time. An entire category of scheduling software has arisen to solve this problem. Tools like Calendly, YouCanBook.me and SetMore focus entirely on this problem. Platforms like Demodesk and HubSpot also have scheduling features built into their suite of features.

The first step in this process involves setting up custom scheduling pages to let leads and customers automatically book meetings in your sales reps' calendars. Almost all scheduling tools allow you to customize lead forms, booking questions and set up custom availabilities.

To avoid back-and-forth emails, you can send customers a booking link and let them automatically book a meeting on your calendar (connected to your Google or Outlook calendar).

Take a look at how you can set up a quick chat with Patrick via the Demodesk booking link:

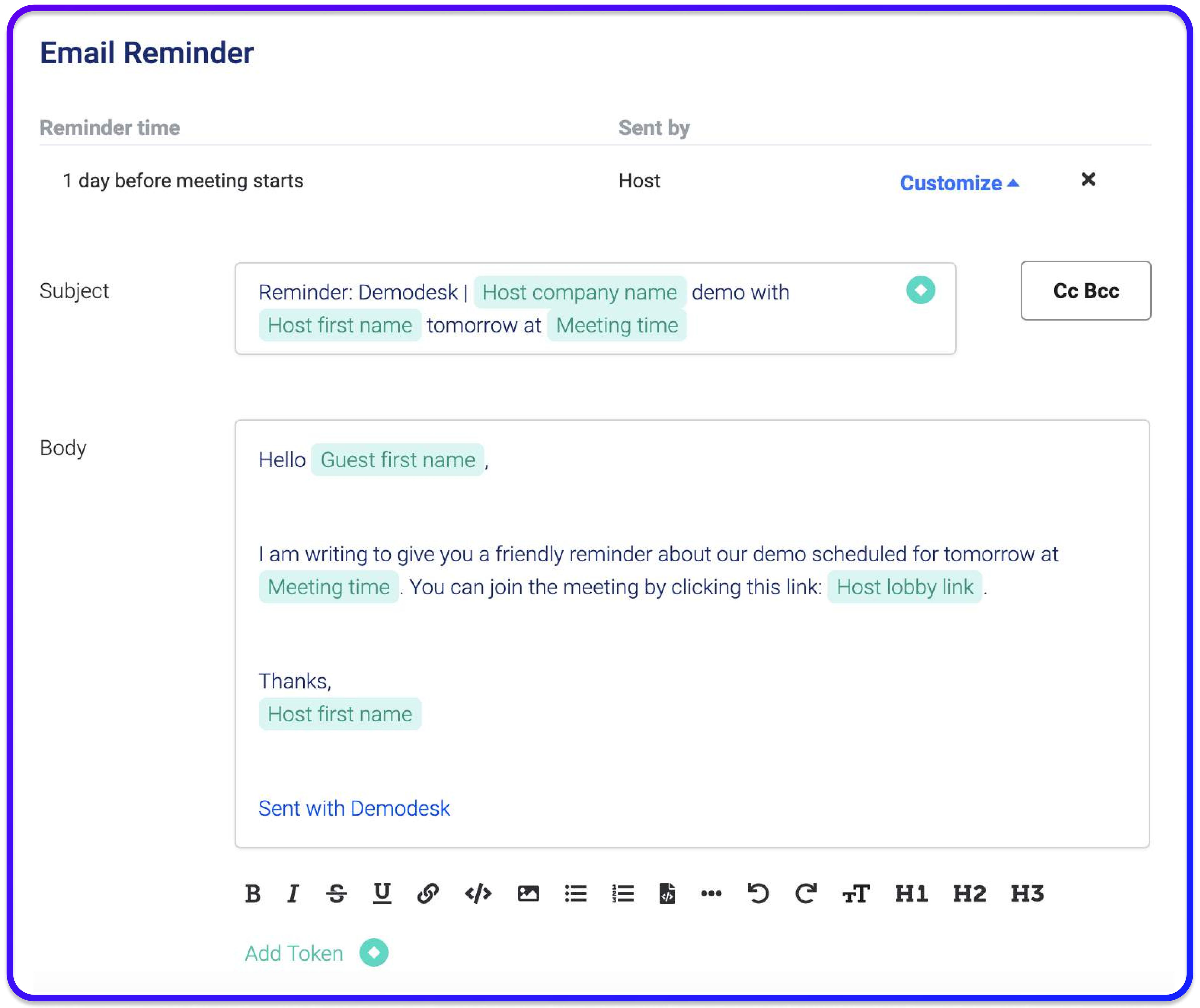



A booking link like this can be shared via email or embed it on your website with custom branding.

Your scheduling software should also be able to send out customizable and personalized event invites and email reminders. This helps to drastically reduce the rate of no-shows which can be huge demotivators for sales reps.

With Demodesk you can also personalize invites and reminders at scale. Powerful CRM integrations allow you to create new contacts and update fields automatically as meetings are booked.

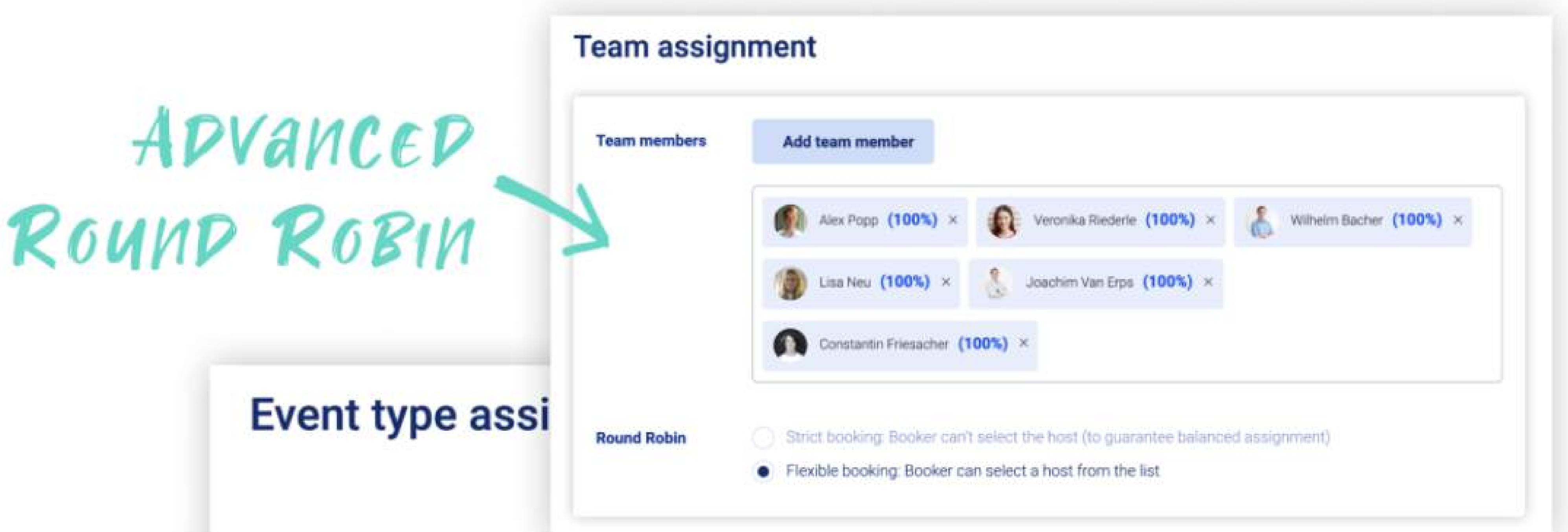
## Automated email reminder template




## Team Scheduling

Some scheduling tools also enable you to set up team calendars that round-robin between multiple sales reps based on their availability. Demodesk's team calendar functionality takes this one step further by automatically qualifying and routing leads to the right rep and serving up the right calendar every time a meeting needs to be booked.

You can also ensure a fair distribution of leads and build intelligent routing rules that automatically assign leads to the correct rep.




## Case Study

As you scale your sales team, scheduling automation becomes even more important. This was [the case of Personio](), an HR and recruiting platform. With their sales team of 30+ employees, Personio can add 70 – 100 new customers every month.

Demodesk's integrated scheduling suite helped Personio automate sales processes and save each sales rep up to 60 minutes per day.

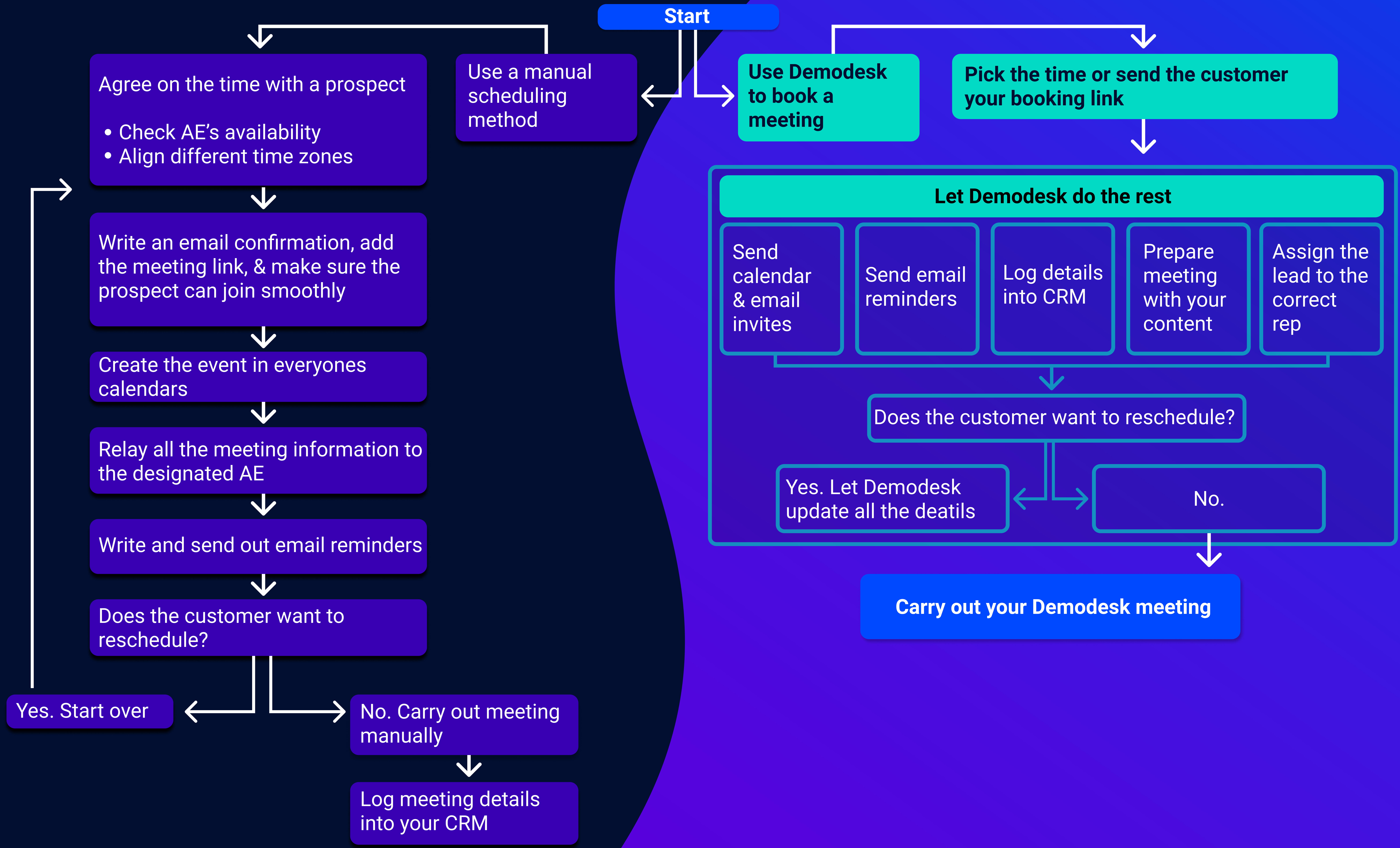
*"Demodesk is a huge time saver for us. Now, our scheduling processes are fully automated and we don't need to switch back and forth between different tools.*

*On top, we send automated, personalized invites and reminders to our customers to make sure they attend."*

***Victoria Röper***
***Sales Manager @ Personio***

# Scheduling

## The Manual Way vs. Demodesk



Chapter 2

# DEMO

# How to Deliver a Winning Demo

For SaaS sales teams, the demo is arguably one of the most important stages of the sales cycle. It's the moment you finally get to show off your product and make your pitch.

But even the best product can become unappealing if it's not highlighted properly. There is a lot that can go wrong in a demo. Thankfully, a lot of those risks can be minimized through preparation and structured processes before the demo even begins!

As with chapter 1, we'll first cover important demo related topics that a sales team needs to know. The second part of this chapter will highlight the processes that sales leaders can implement for the demo stage of the sales cycle.

## The anatomy of the perfect demo agenda

An agenda is not a laundry list of items you hope to cover in the demo. Use the opportunity between the Discovery and the Demo to create an action plan of how you will address their business issues. Frame the demo agenda around how your software specifically helps your prospects. Begin with the most pressing pain point first.

In our experience, the most successful demos are always completed on time. Staying within the scheduled time frame is key, but give yourself some flexibility to read the room and shift gears if needed.

### Typical 30-minute demo agenda

**5 min: Intro**
Establish trust & report with the prospect

**5 min: Set the Stage**
Recap their painpoints & summarize the agenda

**15 min: Solution Mapping**
Focus on the solution for their biggest pain point

**5 min: Next Steps**
Identify next steps & action items moving forward

After you craft an agenda that addresses the core business challenges of the prospect, send it to them beforehand. Consider asking for their feedback on it or if they would like to add anything. If they sign off on it, they will feel like they are more a part of the process, helping you improve your close rates.

## Handling sales objections like a professional

Objections during your product demo can be uncomfortable if you are not prepared in advance to address them smoothly. While you don't want your prospect to challenge you at every turn, the reality is that most objections are beneficial and should help you move closer to a sale.

When a prospect objects, it means they are seriously thinking through everything before they make a purchase. If they are not truly interested, they will let you finish the demo with no comments at all!

How you handle objections is critical in moving the sale along. Here are 7 most common objections that prospects usually bring during the demo and recommendations on how to overcome them.

**Pricing** | **Competitors** | **No authority**

**Features** | **Time** | **Credibility**

## When they bring up the pricing

Ideally, you will avoid discussing price during your product demo, but sometimes a money question will creep in. "It's too expensive" is not what you want to hear while you're showcasing your product after weeks or even months of qualifying the buyer.

When price becomes an issue, you can address it by quantifying their pain points in terms of financial and labor costs. Get them talking about the challenges that have the largest cost implications and then show them how your product addresses the costs. Prospects love to know the ROI (return on investment).

Consider supporting these types of objections with a visual chart or ROI calculator where they can clearly see the benefit of using your product.

## When they bring up competitors

Prospects will often bring up your competitors to show you what you are lacking. The trick here is to show them why your product fits their needs better without putting the competitors down.

Reinforce your product's differentiation points and why they matter specifically to the prospect. Highlight your one 'wow' feature that directly addresses their largest pain point. Here is an example response:

"That's great. It's important to do your due diligence and *(competitor's company)* is certainly a reputable company. We both have different strengths. I think *(company)* is strong at *X, Y* and *Z*. However, our product is different in these areas *(A, B, C)*, and for your specific business needs, this feature, in particular, does a nice job of solving *(biggest pain point)*. Let me walk you through *(feature name)* so you can see for yourself."

## When they don't have buying authority

It's late in the sales process to be in this situation, but what do you say when your prospects tell you they need to talk to their boss? When you hear this remark, your goal is not to ask to talk to someone else, but rather to make them your ally within the company. Make them your influencer on the inside by winning them over, showing them respect and making them your biggest advocate.

## When the product lacks a feature or integration

There are a few reasons why a prospect might think your product is lacking an important feature.

- ✔ They are **focused on the wrong feature** for their problem. Maybe a competitor showed them a really neat feature that plays well in a demo, but it's really a vanity feature.
- ✔ They **want an integration you don't have.** Your solution solves their problems, but you didn't know that they needed it to integrate with another software.

In either situation, ask clarifying questions to understand what the prospect is really worried about. Have them articulate why the missing feature is important to them. Most of the time you have a similar offering or it's something they don't need for their particular use case.

## When they are not ready to buy at this time

Most people will not go through a sales process only to postpone their search at the demo phase. What changed along the way? There are usually underlying reasons about the product that they are not telling you.

Try your best to get to the real reason. After you've exhausted other possibilities, schedule a meeting in the coming months to revisit.

### When they raise trust or credibility concerns

You can't build trust in one call. Always have customer references and other types of testimonials on hand to provide. You should be building trust throughout the entire process. Before the demo, try sending them relevant case studies of other clients to show success stories.

### When there are no objections

It is not a good sign when your prospects are not asking tough questions during a demo. At this point, you should proactively identify objections. If you notice it getting too quiet, ask questions like:

- "Do you have any concerns around X?"
- "Are there any obstacles that would stop you from buying?"
- "How confident do you feel you'd see success from [product]? Why?"
- "I could imagine you being a little worried about X. What are your thoughts?"

**No Objections are not a good sign. Most likely the prospect is not interested.**

### Turn sales objections into wins

People who share concerns and make objections during the demo are interested prospects who want to buy a solution. Make it an opportunity for them to buy yours.

While we've identified the most common sales objections, there is a lot more to cover on the topic. We've written a comprehensive article with more examples to help your sales team overcome sales objections: How to Handle 7 Most Common Sales Objections on the Product Demo.

### Creating scalable demo processes

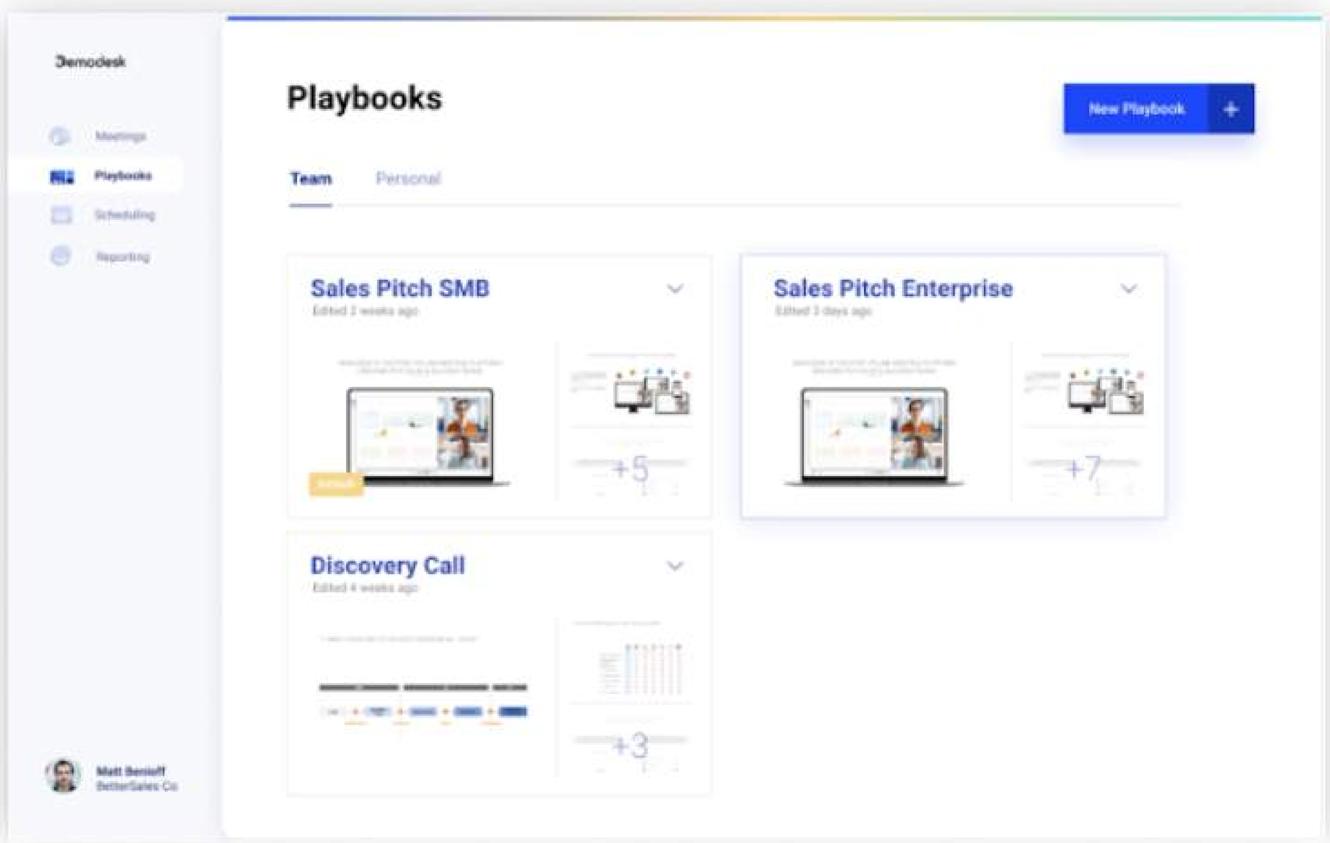
By training your sales team on the topics covered in part 1 of this chapter, they'll understand how to craft the anatomy of the perfect demo and how to handle customer objections. But how do you make sure that everyone on your team is following this advice without getting in their way?

In this section of the chapter, we'll talk about techniques and tools that can help you standardize processes, improve productivity and disseminate the best techniques across your entire team.

## Equip your team: sales playbooks & battle cards

Preparation is the foundation of a great demo. Building sales playbooks saves a lot of time on meeting preparation and ensures that sales reps are consistent and follow the same best practices.

Team and Personal Playbooks




For most teams, a sales playbook is a Powerpoint or Google Slides template that sales reps copy and customize for every meeting. Within Demodesk, a Playbook is a ready-made structure for your meetings that you prepare once and can then use as a template for future meetings.

Demodesk Playbooks are like sales decks on steroids. You can include any kind of content in them, including call scripts, notes, slides, websites, documents and applications.

**Playbooks make sales processes consistent and repeatable,** since every team member is able to use shared templates. You can create a new Playbook for each of your products and services or for different customer groups. We recommend making Playbooks specific to different personas and use cases. It will free up time for your sales reps as they won't have to prepare content for every single meeting.

Besides, with ready-made content, your sales reps don't need to prepare content for every single meeting anymore.

> *"reps spend a full 40% of their time searching for or creating content."*

Preloaded Presentation Content

Once standard Playbooks are set up for the team, with Demodesk you can automatically load them into your rep's meetings. The right content for every call and persona is already loaded and ready to go at the meeting start. Your sales reps can easily access the Playbook materials in the demo without leaving their browser or needing to share their screen.

With Playbooks in place, every sales rep always knows what to say during the demo and saves time on demo preparation.


## Battle cards

We've already outlined some best practices for how your team can handle sales objections, but the best answer might not always come to their mind during the demo. What if your team could have a covert sales expert, telling them the perfect reply to every objection? That's what battle cards help with.

Battle cards contain answers to common sales objections. They're especially helpful for new sales reps who are still getting familiar with your product. For example, if a prospect brings up a competitor, a corresponding battle card would help to clearly outline the differences between your solution and theirs. We recommend creating battle cards for all of the common sales objections discussed earlier in the chapter as well as for your competitors.

Sales leaders and reps can build battle cards within Demodesk and pull them up easily and privately during meetings. The answers live below the virtual screen and enable your team to handle questions effectively. They can also be shared across the team.

## Proper tech set-up

While an amazing product demo is mostly about delivering a solution that addresses your prospect's pain points, there is also an experiential aspect of virtual demos that greatly influences the sale.

As the first step, you need to make sure your prospect can join the meeting easily. Since you don't want to impose download, plug-in, and/or account login requirements on your customers, a web-based meeting tool can solve this problem for you.

With Demodesk sales teams can run issue-free online demos. Meetings are easy to join in just a click from any device and browser with zero firewall issues. It's also packed with features that were designed specifically to help sales reps close more deals. Here's a breakdown of a typical demo tech-set up with and without Demodesk.

## Typical screen-sharing software demo set-up process

- **Remove all distractions.** Turn off your computer's notifications so that there are no interruptions. Use a new browser without add-ons and extensions to remove distractions from the screen.
- **Open all the presentation materials**, slides, apps, pages, etc. you will need to use during the demo and minimize them in the background.
- **Hide your notes.** Open a text file or a notes app so you can record questions or comments that you'll want to address during the meeting.
- **Keep track of potential customer details.** To track the progress of the sale and collect customer information, make sure your CRM system is up and ready so you can manually collect information as quickly as possible.

## Demodesk demo set-up process

- **Relax knowing that notifications will not interrupt your call.** Your virtual meeting room is separate from your desktop. recordings into your CRM without leaving your demo.
- **Select one of your preset demo playbooks.** The right content for every call and persona is already loaded and ready to go. Easily access your materials in the demo without leaving your browser.
- Keep it simple with **in-meeting note-taking** so no external applications are crowding your screen.
- **Integrate your CRM software.** By connecting your CRM software you will be able to automatically log notes, call details, and recordings into your CRM without leaving your demo.

*"Demodesk has the absolute advantage that we can send the link to our customers relly easily - via email, via Whatsapp, via SMS.*

*And the customer doesn't have to register or download anything, he can just click on this link and we are right where he is."*

***Christina Terbille***
***CEO @Die Pferde App***

*"Tell me and I forget, teach me and I may remember, **involve me** and I learn."*

*-Benjamin Franklin*

## Share control for maximum prospect engagement

This quote from Benjamin Franklin can certainly be applied to demos. There has been a lot of research into memory retention rates for different methods of learning and the results are clear.

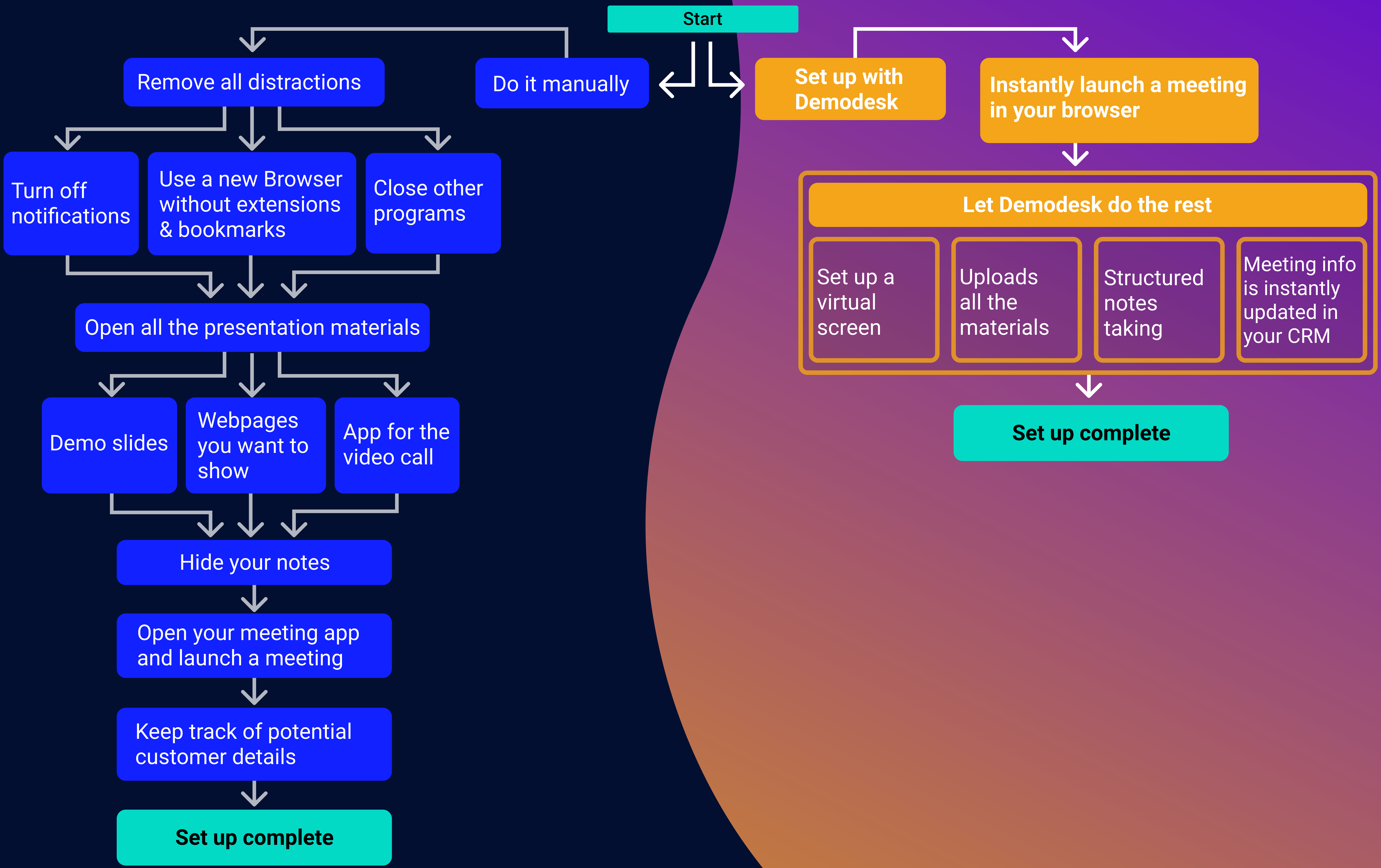
Even the most elaborate demos will yield memory retention rates of only up to 50%. This means that the prospect quickly forgets about half of the benefits you showed him. This will of course hurt your chances to close the deal.

How can you now increase retention and boost closing rates? Let the prospect discover the benefits of your solution himself.

With Demodesk, mouse and keyboard control can instantly be shared with multiple participants for real-time collaborative browsing and editing. Instead of you only explaining the advantages of your platform, the prospect experiences them firsthand, reinforcing the value of the product into their mind.

# Demo Tech Set-up

## The Manual way vs. Demodesk



Chapter 3

# CONVERT

# How to Follow up a Demo to Close the Deal

After setting up the perfect scheduling and demo processes, there's just one thing left to do - convert customers! If you're lucky, a good discovery call and demo might be all it takes to close the deal. For most SaaS sales teams though, a little more effort needs to be made after the demo to convert the prospect into a paying customer.

Having good post-demo processes in place is crucial. An incredible demo can easily go to waste without a proper follow up afterwards.

This chapter starts by covering important post-demo topics that your sales team should be trained on. The second part goes over processes and technology that sales leaders should put in place to improve conversion rates.

## Leveraging next steps to keep the sale moving

Get your prospects to agree on the next steps before you end your product demo and your chances of a sale will increase. When you use next steps as a tool to keep the momentum moving, you're taking one step closer to closing the deal. Sales reps who spend four minutes longer talking about next steps than their peers, win more deals.

Chris Orlob, Director of Sales at Gong.io, discovered that close rates can nosedive by over 70% when you fail to discuss the next steps. Needless to say, it is a critical step that should not be overlooked.

In this section of the chapter, you'll learn how to define and use "Next Steps" to your advantage.

## Know your next steps before the demo

Part of your demo planning should include preparing your next steps in advance for the meeting. Use the information you learned in the sales discovery call to anticipate what you will need to cover.

> Do you need to bring in more decision-makers?
>
> Are you ready to present the contract?
>
> What is their buying process?
>
> How can you move the sale ahead?

One idea is to include a short sentence in your demo scheduling email that teases the next steps, so the prospect already has it in the back of their mind. You can add a sentence like this:

*"Following the demo and Q&A, we'll send you the final proposal the next day for you to review and schedule a contract call time."*

## Change your question strategy

During the demo and discovery call, you should ask more open-ended questions to encourage your prospects to talk more and get them to explain what they are thinking. When the time comes to discuss Next Steps, change your question type from open-ended to pointed questions.

Pointed questions are more direct and are designed to elicit very specific answers. For example, you can ask questions like:

**Would you like to set up another meeting now to include your colleagues?**

**Is there anything else you need to see to help you make your decision?**

**Can you help me understand your internal next steps and timing for a final decsion?**

## End the demo with a call to action

Once you've identified your Next Steps, make sure your prospects are crystal clear on what you want them to do next. For example, if you determine you need to speak with someone else with more authority, you can say:

"Do you think *(name of stakeholder)* would be excited about seeing how our *X* feature can reduce your costs and solve *X* pain points? As an immediate next step, we should show them how it works. Do you have their availability to schedule something now?"

By reinforcing the value of your product before you introduce Next Steps, you'll help your prospects connect the dots.

### Define the next steps for your product demo

- Define your next steps before the demo even starts
- Ask pointed questions during the Q&A
- Make a strong closing statement
- Set your prospect's expectations for success
- Always confirm your next steps

This is a high-level overview of how to develop a successful "Next Steps" strategy. If you want to go deeper, check out our article: Why Defining Next Steps During Your Demo Can Make or Break the Sale.

## Writing demo follow-up emails convert

Every interaction with your prospects has the potential to improve the chances of a sale.

With that in mind, seize the opportunity to move the sale ahead with your demo follow-up email. Instead of sending an email that simply reminds your prospects of what is coming next, encourage them to take action.

Below you will find a follow-up email checklist and common mistakes to avoid. This section will help you to write product demo follow-up emails that maximize the momentum generated in the demo.

Want to dive deeper into follow up emails? Check out [Remote Sales Follow Up Emails That Convert (+Templates)]

## Creating scalable processes to convert

In this next section we'll show how sales leaders can use technology + processes to set their team up for success after the demo.

Every team's technology stack looks different and there are more tools than ever before, so we can't explain how to implement these recommendations for your particular tech setup. Instead, we'll use the setup in Demodesk as an example. No matter what tools you use, the main concepts remain the same.



# 6 Common Follow-up Mistakes

- **Don't follow up right away, but also don't wait too long. Generally, wait 12-working hours.**
- **Don't send emails when prospects are not there! (after work, weekends, holidays)**
- **Don't use first-person words like "I, me, my, we, us, & our". Instead, use "you & your"**
- **Don't give your prospect too many tasks. Keep it to one action.**
- **Don't forget to track your conversations or email metrics.**
- **Don't make grammatical or spelling errors. It seems simple, but it has a big impact.**

## Leveraging demo recordings

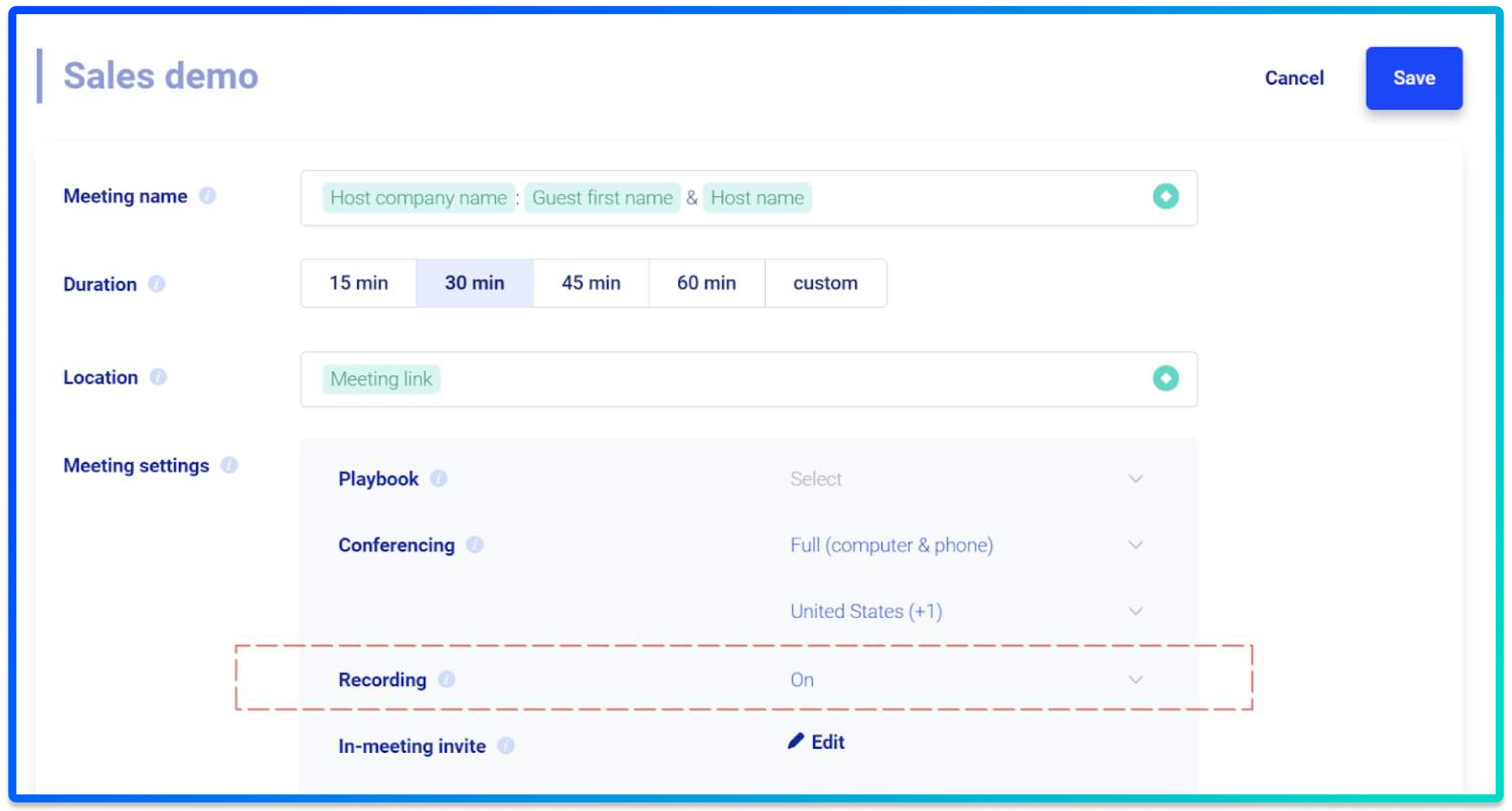
If you're not already, you might consider recording and storing all of your demos. Demo recordings are beneficial for a variety of reasons. They enable both your sales reps and prospects to recover key details from the meeting and are incredibly valuable in the long term when it comes to training and sales development.

Make sure the online meeting platform your team uses can record all of your meetings and has the following capabilities:

- Stores recordings in the cloud, not just on local desktops
- Automatically syncs to your CRM
- Easily shareable throughout the team & prospects
- Accessible through a URL
- Automatic recording

Within Demodesk, users can decide to automatically record all meetings for any of the Event Types they set up. As a sales leader, you should make sure that all discovery calls and demos are automatically recorded. It's too easy for sales reps to forget to record meetings, which means losing out on important details and opportunities for training.

### Event Type template

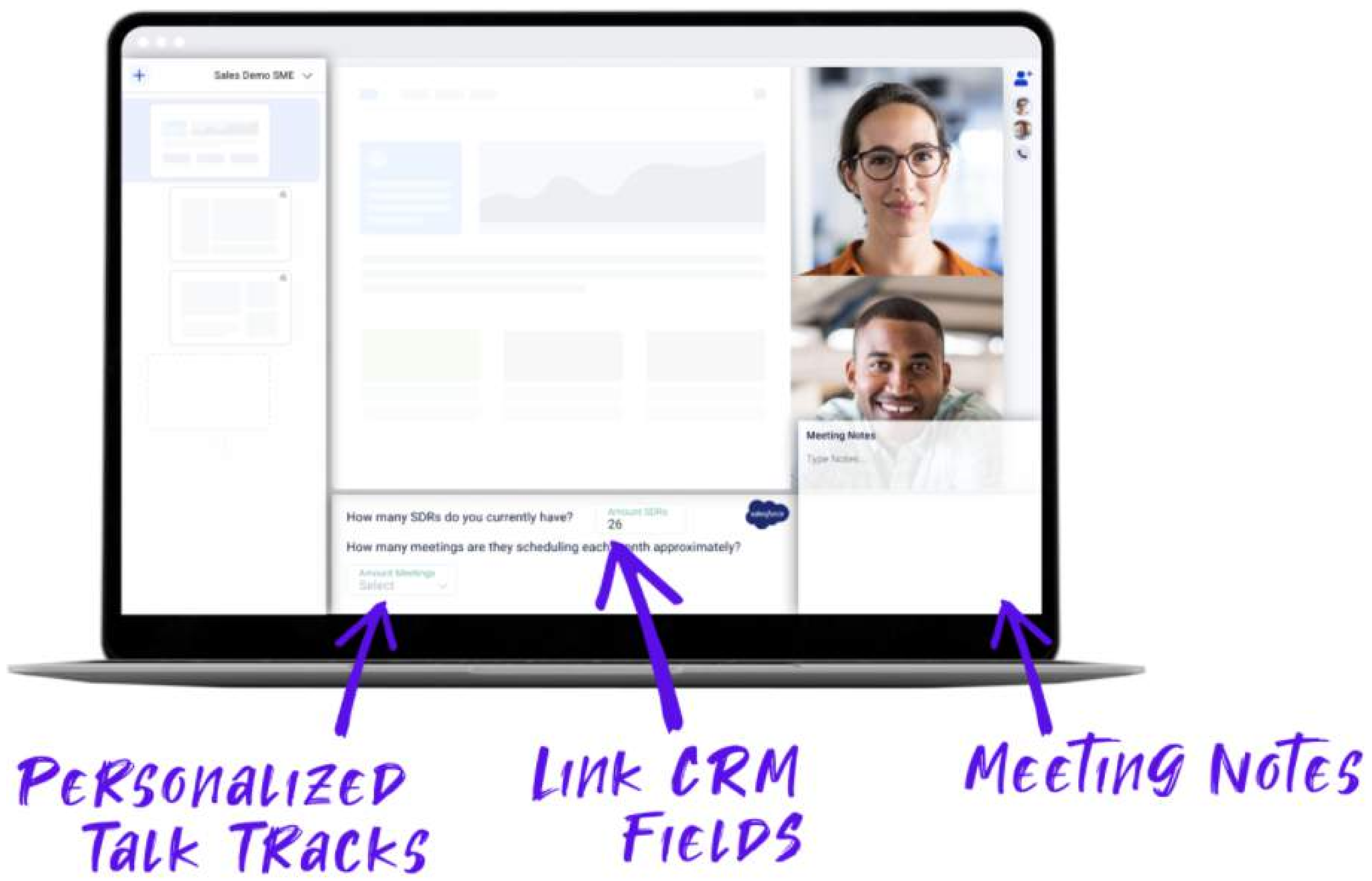



Make sure that your recordings are backed up in the cloud and are available online, as opposed to sitting in your team's local server files. Having them stored online ensures that they're accessible by other members of the team.

## Standardize note taking

Like recordings, there are a lot of benefits of taking notes during sales demos. It can help sales reps customize their follow up approach and gives them a greater chance at closing the deal. With a proper note-taking system in place, your sales reps likely won't have to spend time watching their recordings.

Like demo recordings, notes are more valuable when they're easily accessible by your entire team. They should automatically be synced to the lead/contact or meeting in your CRM so that sales reps and managers can use them in the future.




You can standardize some of your note-taking processes in Demodesk by including custom Tokens in your Playbook's Speaker Notes. **Speaker Notes** are customizable prompts/talk tracks that remind sales reps what to say during a particular part of the demo.

**Tokens** are dynamic information fields that can be inserted within the speaker notes that allow you to collect specific information about your prospect. When the meeting is over, this information is then synced to the correct fields in your CRM.

This also works in reverse. If this information is already present in your CRM, Demodesk will pull in the information for that field into the demo and allow it to be updated if need be.

CRM integration eliminates manual data entry and inaccurate reporting and tracks activities for ultimate efficiency - learn how.

*"All of that is possible with Demodesk. It is independent of the technology that your counterpart is using.*

*You can use it with every web browser, so it always works. We will be going on using it and growing our business."*

***Mark Hirtz, VP Revenue @ DataGuard***

Demodesk

# Final Checklist

## 1 Schedule

- [x] Use scheduling best practices to reduce no-shows
- [ ] Automate the scheduling processes for calendar invites and email reminders
- [ ] Use a team scheduling tool to route meetings to the right reps

## 2 Demo

- [x] Craft a Demo agenda that acts on the key pain point and pushes the sale
- [ ] Utilize premade playbooks to maximize efficiency & ensure use of best practices
- [ ] Have a tech set-up that increases prospect engagement

## 3 Convert

- [x] Leverage Demo recordings to help coach and improve processes
- [ ] Craft a follow up email that focuses on one key action item
- [ ] Standardize note taking to create data transparency and effectiveness

## 4 Implement