



**DO
MORE.**

SOFTWARE DEMO AUTOMATION PLAYBOOK

**PRESALES
ROCKS.TARS**

10 STEPS TO CLOSE MORE DEALS

01 Offering a Full Screen View

02 Leading with a clear Problem Statement

03 Breaking it down into Micro Demos

04 Framing your Demo around Values, not Features

05 Choosing a compelling Starting Point

06 Avoiding Feature-Driven Demos

07 Providing Context at any Stage

08 Shortening the Path to Value

09 Capturing Leads after providing Value

10 Using appropriate CTAs



**BUILD AUTOMATED
DEMOS THAT SELL**

SOFTWARE DEMO AUTOMATION

Buying behavior has changed significantly over the past few years, and potential customers expect instant access to information and prefer exploring solutions on their own terms.

As a result, buyers conduct extensive research independently, spending minimal time interacting directly with vendors and sales. Providing an automated, interactive demo tour on your website is one of the options to meet your buyers' requirements and provide a more frictionless buying experience.

While providing immediate, interactive access to your product, it's essential to recognize that the effectiveness of these tools depends on their design and execution. **A poorly crafted demo can do more harm than good, misleading or frustrating potential customers.**

This guide dives into best practices of creating compelling, automated demos that not only engage but also accurately represent the value of your software.

We'll explore:

Strategic Design: Learn how to craft demos that are intuitive, informative, and aligned with your users' needs.

Avoiding Common Pitfalls: Understand the common errors that can turn an automated demo into an obstacle rather than an asset.

Personalization and Engagement: Discover how to tailor your demos to different user personas, making each interaction feel unique and relevant.

Leveraging Tools for Maximum Impact: Utilize demo automation platforms effectively to enhance user experience, not just for scalability.

In the following sections, we'll learn how to make the most of this technology.

By the end of this guide, you'll have a clear blueprint for creating demos that not only showcase your product effectively but also resonate with your audience, setting the stage for a meaningful engagement with your company.

Who Will Find Value in This Guide:

SaaS Businesses: Refine your approach to presenting your software solutions in a competitive digital market.

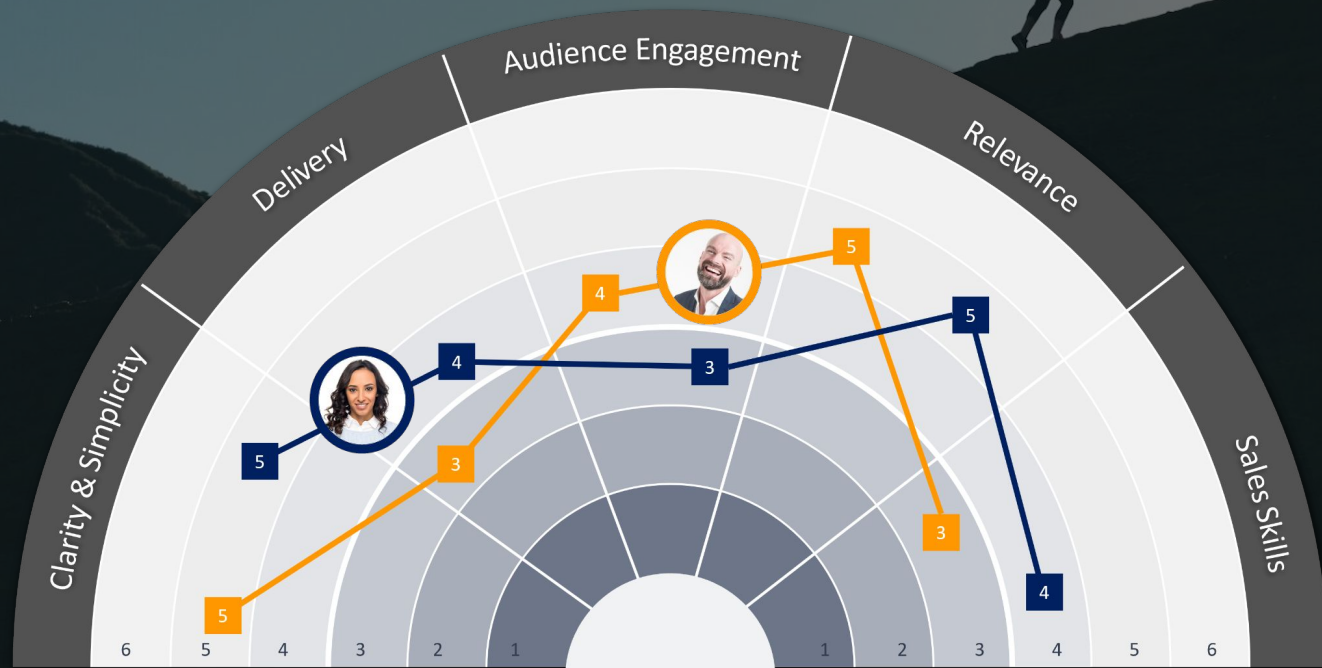
Marketing and Sales Teams: Align your strategies to provide insightful, engaging product experiences through your website.

Presales and Solution Engineers: Empower users to discover the full potential of your product, freeing your team for deeper, more strategic engagements.



FREE DEMO ASSESSMENT

Identify Strengths and Blind Spots in Your Demos to Systematically Improve Your Performance



Scope:

Objective 3rd-party evaluation of your software demo, offering unbiased feedback

In-depth analysis of essential demo success factors

Practical tips for enhancing demo delivery

BOOK FREE AUDIT

LIMITED AVAILABILITY

#1 OFFER A FULL-SCREEN DEMO

The way you present your product is as important as the product itself. This brings us to a crucial aspect of demo design - the decision to go full-screen.

It's not just a stylistic choice; it's about creating the most effective and engaging experience for your potential customers.



DO

Embrace a full-screen demo experience. Think of your demo as a real-life tour of what your software offers.

This approach lets customers see exactly how they'll interact with your product, building trust and understanding right from the start.



DON'T

Squeeze your demo into a small, limited space.

A tight display isn't just unrealistic; it makes using your demo hard. Customers might have to scroll a lot to see everything, and they can miss key parts of your interface. Instead of providing a great user experience, you cause frustration!

Why it Matters:

Realism and Trust: A full-screen demo allows viewers to visualize themselves confidently navigating and using your product as intended. This builds trust and establishes a sense of familiarity from their very first interaction.

Clarity and Focus: By removing the constraints of a small window, you allow the key features and design elements of your software to shine. Prospects can fully appreciate the interface's layout, workflows, and capabilities without the frustration of constant scrolling and zooming.

Positive Perception and Engagement: A small demo window can subconsciously leave prospects underwhelmed, even if your product is exceptional.

Extra Tip

Consider building in responsive design elements for your full-screen demo.

This ensures that the experience translates seamlessly across desktops, laptops, and tablets, guaranteeing a smooth and accessible viewing experience for every potential customer.



Govern cloud workloads

✕ Exit demo

Home Request Center Approvals Task Manager **Certifications** Search Admin

? | Jerry Bennett ▾

Active Completed

Identities that have not used App in 90 Days

analyze and correct unused or terminated accounts (group o...

Decisions Made **Overdue By**
91 of 6000 29 Days

[DETAILS](#)

CyberArk Privileged Access Review

Review of users with access to CyberArk Privileged Entitleme...

Decisions Made **Overdue By**
0 of 2 22 Days

[DETAILS](#)

Quarterly Manager Review

This review filters for Active managers and excludes ne...

Decisions Made **Overdue By**
2 of 261 20 Days

[DETAILS](#)

SailPoint Access

SailPoint Cloud Infrastructure Entitlement Management can deliver broad quarterly access reviews, as well as focused

Role Composition Review

Role Composition Review

Decisions Made **Due In**
0 of 6 11 Days

[DETAILS](#)

Uncorrelated Accounts

Uncorrelated Accounts

Decisions Made **Due In** **Reassigned From**
0 of 893 22 Days [SailPoint Services](#)

[DETAILS](#)

↺ Start over

Next feature: Streamline role creation →

Small frame makes it difficult to navigate; tooltip (left bottom corner) is cut off.

Coop & Co

how do i request to buy new software?

Ask a Question

Create a Card

Help

Workspace settings

Answers Beta

Disable Answers

General

Users and Collections

Apps and Integrations

Billing

Domain Discovery

Invite Preferences

Customization

Guru Tools

Assist

Answers

Tag Management

Knowledge Triggers

Recent Activity

Content Export

Ticket Linking

Org Chart

AI Enterprise search

See all of your team's questions in one place in the **Answers Dashboard**. Guru shows admins the employee questions and searches that produced no results, making it easy to identify and fill knowledge gaps.

Back

7 of 15

Next

Flagged 0

Marked correct 0

Assigned to Expert 4

viewing all Answers for the last 5 day

	Sources	↓ Date
request to buy new software?		Nov 21, 2023
connect to the vpn?		Nov 21, 2023
log sick time?		Nov 21, 2023
charge of sending marketing emails to customers?		Nov 21, 2023
What's the office wifi password?		Nov 21, 2023
Where can i get my W2?		Nov 21, 2023
How do i fix error code #98234?		Nov 21, 2023
How do i build a quote in salesforce?		Nov 21, 2023
When does open enrollment start?		Nov 21, 2023
What's the solution for error code #3045?		Nov 17, 2023
How do i log PTO?		Nov 17, 2023
Where do i log customer feedback?		Nov 17, 2023
What does KPI stand for?		Nov 17, 2023

APPROVED

Full screen makes it look real and easy to get an overview!

#2 LEAD WITH A CLEAR PROBLEM STATEMENT

Creating a successful software demo often depends on how you begin. This section focuses on the importance of starting with a clear problem statement, ensuring your demo is immediately relevant and engaging to your audience.

Starting with a precise problem statement makes it easy for your prospects to follow your storyline, and understand the bigger picture with ease.



DO

Begin every micro demo with a well-defined problem statement directly relevant to your target audience's industry. Craft a narrative that demonstrates a deep understanding of their pain points.



DON'T

Immediately launch into product features or capabilities. Resist the urge to focus solely on what your software does without first providing context around the problem it solves.

DEMO 101

**"IF YOUR CUSTOMER HASN'T
RECOGNIZED A PROBLEM YET,
THERE'S NO POINT IN PRESENTING
THEM WITH A SOLUTION."**

Why it Matters:

Resonance and Relevance: Grounding your demo in a problem statement instantly establishes a connection with prospects. They see you understand their world and are focused on addressing their challenges.

Customer-Centric Focus: This approach reinforces that your solution is about the customer's success, not merely a list of technical features.

Improved Storytelling: A problem statement creates a natural arc for the demo. You demonstrate how your solution leads the prospect from a familiar pain point to a positive, transformative outcome.

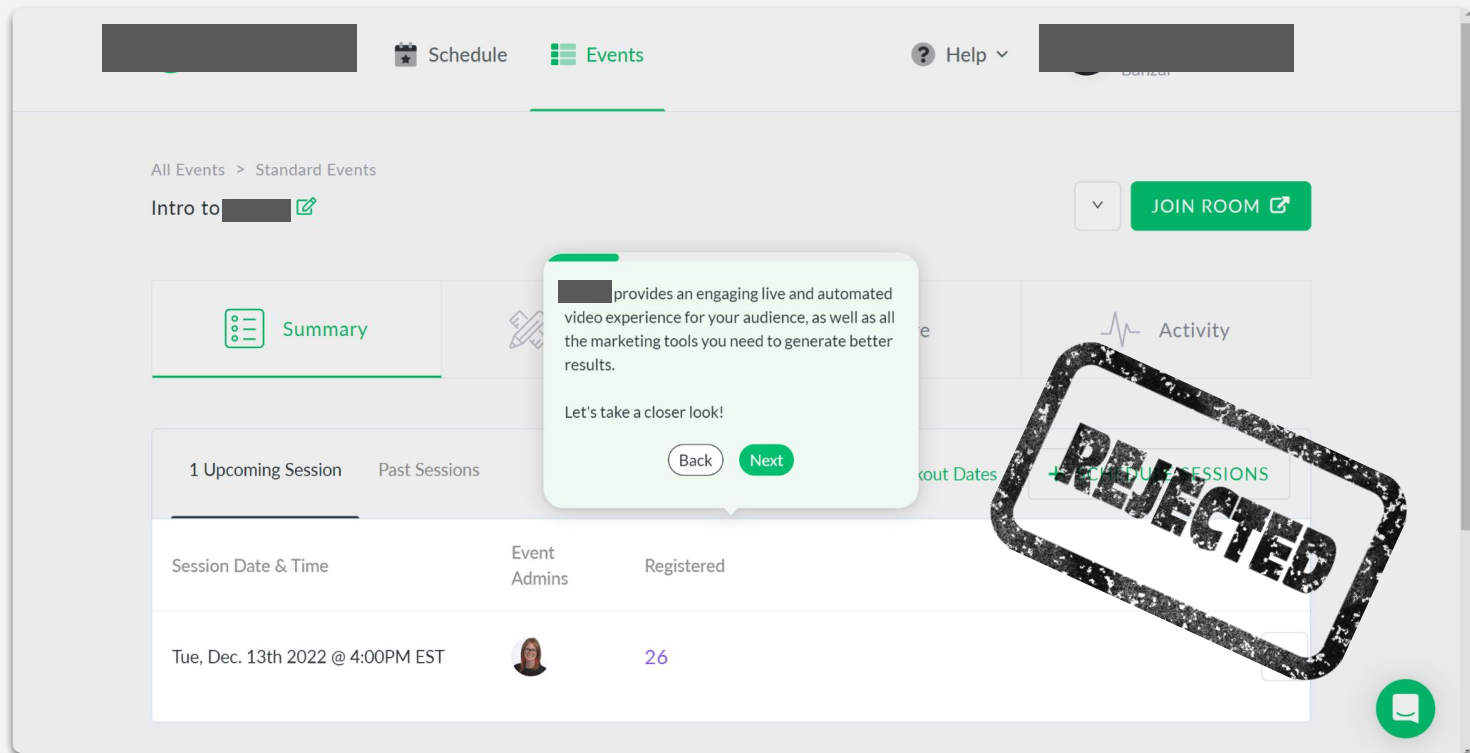
Bad Intro: "Our platform has a powerful data analytics engine..."

Good Intro: "Ever miss out on critical campaign insights because your data lives in scattered spreadsheets and dashboards?"

Extra Tips

Use the Prospect's Voice: Incorporate phrasing prospects would use to describe their problem. This helps them feel truly understood.

Open with a Question: Start with an insightful question that puts the spotlight on the problem. For example, "Are you spending more time searching for data than using it to drive growth?"



What problem are you solving here?

Back to Axonius

GET A DEMOGET A FREE TRIAL

AXONIUS

Discover Now

Use new color paletteAdd Dashboard

Dashboards

SaaS Executive Overview Last Updated 12 days ago

Total Discovered Applications

91

count of Name on ALL results
↑ 1 discovered_saas_applications (+1.11%) since 7 days ago

Total SaaS Applications

1,600

count-true (1,600) II No net change

Settings Count per source

Azure98

Google Workspace97

ServiceNow80

Zoom52

Okta38

Total 365

1 - 5 of 66 items

Total SaaS Application Spend

Users Per SaaS Application

User Activity Status (Utilization)

Welcome to the Axonius SaaS Management Tour!

Axonius SaaS Management helps customers control the complexity, cost, and risk associated with SaaS applications.

By connecting to all layers of the SaaS application stack, Axonius SaaS Management:

- Discovers the entire SaaS app stack, including unsanctioned, shadow, and unmanaged SaaS apps, 3rd/4th party extensions, and OAuth tokens
- Identifies and helps mitigate various security risks, and SaaS compliance gaps
- Delivers insights for better IT management and cost optimization

Let's Go!

APPROVED

Clear problem statements!

#3 BREAK IT DOWN INTO TARGETED MICRO DEMOS

Personalization and conciseness are key. This is especially true in software demos, where a one-size-fits-all approach is no longer effective.

Instead, breaking down your demo into targeted micro demos can significantly enhance the user experience.



DO

Design each micro demo around a specific customer problem or pain point. Avoid broad, feature-centric demos in favor of those that address a well-articulated challenge your prospects likely face.



DON'T

Force prospects into a single, lengthy demo that tries to be all things to all people. This approach dilutes the focus, reduces relevance for individual visitors, and creates the risk of information overload.

Why it Matters:

Personalized and Efficient Experience: Micro demos enable prospects to self-navigate content that speaks directly to their needs. They aren't burdened with information that doesn't matter in the moment, creating a smoother and more engaging experience.

Increased Message Clarity: When you focus on a single problem, you can craft a tightly-knit demo highlighting how your solution solves it. This eliminates distractions and maximizes the impact of your value proposition.


Easier to Remember: Prospects are more likely to retain the key takeaways from concise micro demos tailored to their specific interests. Lengthy demos tend to blur together in their memory.

Instead of a single, monolithic "Complete Product Demo," you could offer:

- Micro Demo 1: "Simplify Campaign Reporting in Under 5 Minutes"
- Micro Demo 2: "Streamline Onboarding and Reduce Customer Churn"
- Micro Demo 3: "Boost Sales Productivity with Data-Driven Insights"

Extra Tip

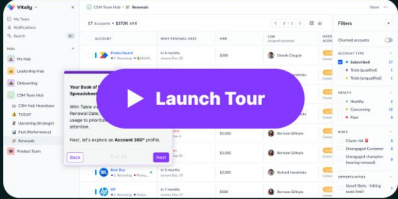
Clearly title and describe each micro demo on your website. This allows visitors to quickly identify demos directly relevant to their priorities.



Products ▾ Solutions ▾ Customers Success Network ▾ Pricing Company ▾

Sign In

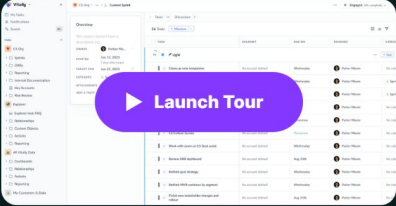
Get Started



Launch Tour

Platform Overview

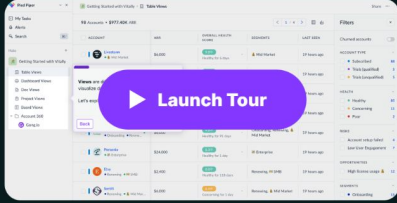
Take an in-depth tour of Vitality's Customer Success Platform.



Launch Tour

Hubs

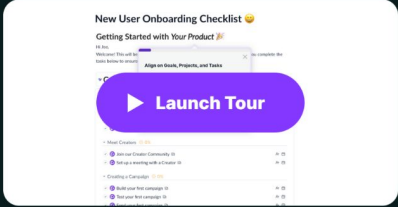
Create and manage workspaces that drive increase productivity and efficiency across your teams.



Launch Tour

Views

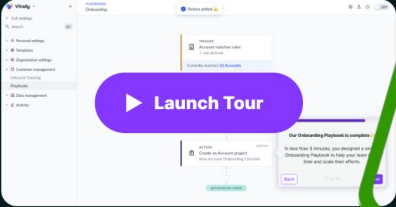
Build dynamic Views for organizing data, collaborating with customers, and more.



Launch Tour

Docs

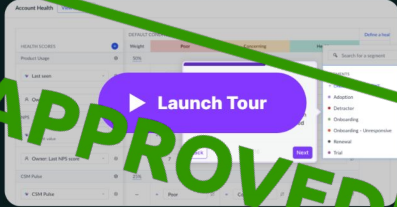
Collaborate with customers in real-time, leveraging customer data and insights from Vitality.



Launch Tour

Automation

Increase your CS team's productivity by automating account assignment, customer segmentation, and other day-to-day manual tasks.



Launch Tour

Health Scores

Achieve a more accurate picture of customer health. Create scores that dynamically change based on lifecycle stage, segmentation, and much more.

Pick from various micro demos; improvement: make them about problems, not features!

#4 FRAME AROUND VALUE, NOT JUST FEATURES

When it comes to effective software demos, it's not just about showcasing what your product can do; it's about highlighting how it can make a difference for your customers. This chapter dives into the art of framing your demo around the value your product brings, rather than just its features.



DO

Translate features into solution-oriented benefits.

Instead of merely saying, "this is what you can do with the software," always go the extra mile and explain, "this is what the software or feature can do for you."

Explicitly connect the capabilities of your product to the positive outcomes the prospect desires.



DON'T

Let technical details dilute the core message. While showcasing functionality is essential, don't let it become the sole focus of your demo.

Potential customers might not fully grasp the significance of a sophisticated feature if they don't see how it translates into a benefit or improvement.

Why it Matters:

Resonance: Your prospects care about solving their problems and reaching their goals. Show how your software helps with these, and your demo becomes more compelling and relevant.

Understanding: When you link features to real-life benefits, prospects get a better picture. They see how your product fits into their work and improves their day-to-day tasks.

Engagement: Highlighting the "what's in it for me" aspect keeps prospects interested. They start to see how using your solution could bring them success and benefits.

Bad demo phrasing: "You can build reports easily via drag and drop."

Good demo phrasing: "Our drag-and-drop report builder eliminates the need for complex coding. Now, you can easily generate the reports you need to track critical metrics and make informed business decisions in half the time."

Extra Tips

Use the Prospect's Language: Adapt your value statements to mirror industry jargon and the specific terms your prospects use to describe their challenges.

Quantify Benefits: When Possible: Instead of "save time," consider "save X hours each week."

Or, replace "improve efficiency" with "increase conversions by X%." Quantifiable benefits add weight to your message.

On average, customers use only **11%** of any software's features! Identify their **job-to-be done**, and fully focus on that one!

Comment and tag team members within DealSpace or add tasks that sync directly to Salesforce.

Back 6 of 8 Next

NA Enterprise deal review

1 of 52

cast category commit

Meetings to date: 6
Latest: 3 days ago

Deal Vitals: 5/5

Deal age: 61 days

Incomplete: 1 Roles: 3

Jane Cooper
Director, Enterprise Sales, NA Region
Champion

Cody Fisher
Senior Manager, RevOps
Evaluator

Cameron Williamson
No title
Decision maker

Roadblocks/Risks

- Champion tells us they're facing budget constraints due to economic conditions, so the org is hesitant to commit
- Seems to be delays in the decision-making process - we don't know why this is yet
- Sensing internal pushback or political resistance - just access to key executives and

+ Add Item

Plan of Action

- Recurring meeting with Gnar.Jy - Tuesdays
- Seeing what pricing options we have (flexible payment, term discount, etc.)
- Send estimated workback plan so prospect is clear on current timeline
- Setting up a demo for supporting BU
 - Jane intro'd me to VP of another business unit who's heard of us before and wants a demo for her whole team
- Facilitate meeting to address Q's & C's

Manager notes

Manager notes are only accessible to you

Add a note

How's this deal going?

Add

Notes on this deal

You 1 day ago
Prospect is still hesitant, but Quinn arranged for them to speak with one of our satisfied customers who had made the switch (TODO: confirm name) and has seen significant improvements in their workflow.

You 1 week ago
Prospect came inbound, solid expand potential. Might take time, but would be a great logo to add.

REJECTED

"This is what you can do with XYZ", instead of "This is what XYZ can do for you"!

Enjoy the tour? [Try Guru for free](#) [Watch a demo](#)

Search Coop & Co

Coop & Co

- Home
- Threads
- Drafts & sent
- Team
- Direct messages
- Channels
- # help-it
- Apps
- Guru
- Add apps

help-it Help from @it

Guru APP 6:10 AM
Suggested answers added to #help-it by @Matt

Guru will monitor this channel for questions and reply with a suggested answer based on the Guru content and connected sources you have access to. Try it out now by asking a question!

Craig 9:36 AM
I have a new phone and having trouble logging into Okta, what can I do?

3 replies

Kaiya 10:21 AM
How do I set up a new phone with okta?

6 replies

Davis 11:38 AM
I am trying to login to asana via okta but i noticed my security photo is

9 replies

Hannah 12:18 PM
@Matt I did a mini scrub of the acg-aws-rds-readonly group and Connor no longer needs access; can you remove? than

Message #help-it

AI Enterprise search

In Slack, Guru's personal assistant-like capabilities actively give answers without needing to be tagged. Guru automatically scans your existing knowledge base and replies with an answer in plain language—all within seconds.

Back 6 of 15 Next

Thread

Craig 9:36 AM
I have a new phone and having trouble logging into Okta, what can I do?

3 replies

Guru APP 9:37 AM

"I have a new phone and having trouble logging i..."

Filtered to Cards shared with All Members

Suggested Answer:

To set up a new phone with SSO, you'll need to set up at least one multi-factor authentication (MFA): SSO Verify, Biometric (using touchID on your Mac), or Google Authenticator (reference SSO Setup Card for the process for each). Then, you'll receive an activation email to finish the setup process.

Matt 10:38 AM
If this doesn't work, let me know.

Craig 10:40 AM
Thanks, Matt!

Reply...

☐ Also send to # help-it

This is what Guru does for me!

#5 START WITH A COMPELLING STARTING POINT

First impressions are everything. How you begin your (micro) demo can make the difference between capturing your prospect's interest or losing it.

This chapter focuses on the strategic choice of starting your demo with a compelling scene that directly addresses a key pain point.



DO

Begin your micro demo with the most impactful screen, feature, or dashboard view directly demonstrating how you solve the prospect's pain point.

Cut straight to the heart of the matter, ditching the traditional multi-click journey to get there.



DON'T

Default to starting your demo with the login screen or a generic product overview.

These initial steps add unnecessary friction and delay the prospect's experience of tangible benefits.

Why it Matters:

Immediate Grabbing of Attention: Prospects have limited attention spans. You need to immediately showcase how your solution connects to their challenges, demonstrating its relevance and potential value right from the start.

The "Aha!" Moment: Showcasing your solution's core value upfront can generate an exciting "aha!" moment, propelling the prospect to want to learn more.

Maintaining Focus: Zeroing in on your solution's core strengths maintains a problem-solving narrative throughout the micro demo. It avoids the dilution that can occur when the demo veers into less relevant features or areas.

Let's imagine your micro demo promises "Seamless Customer Onboarding in Minutes:

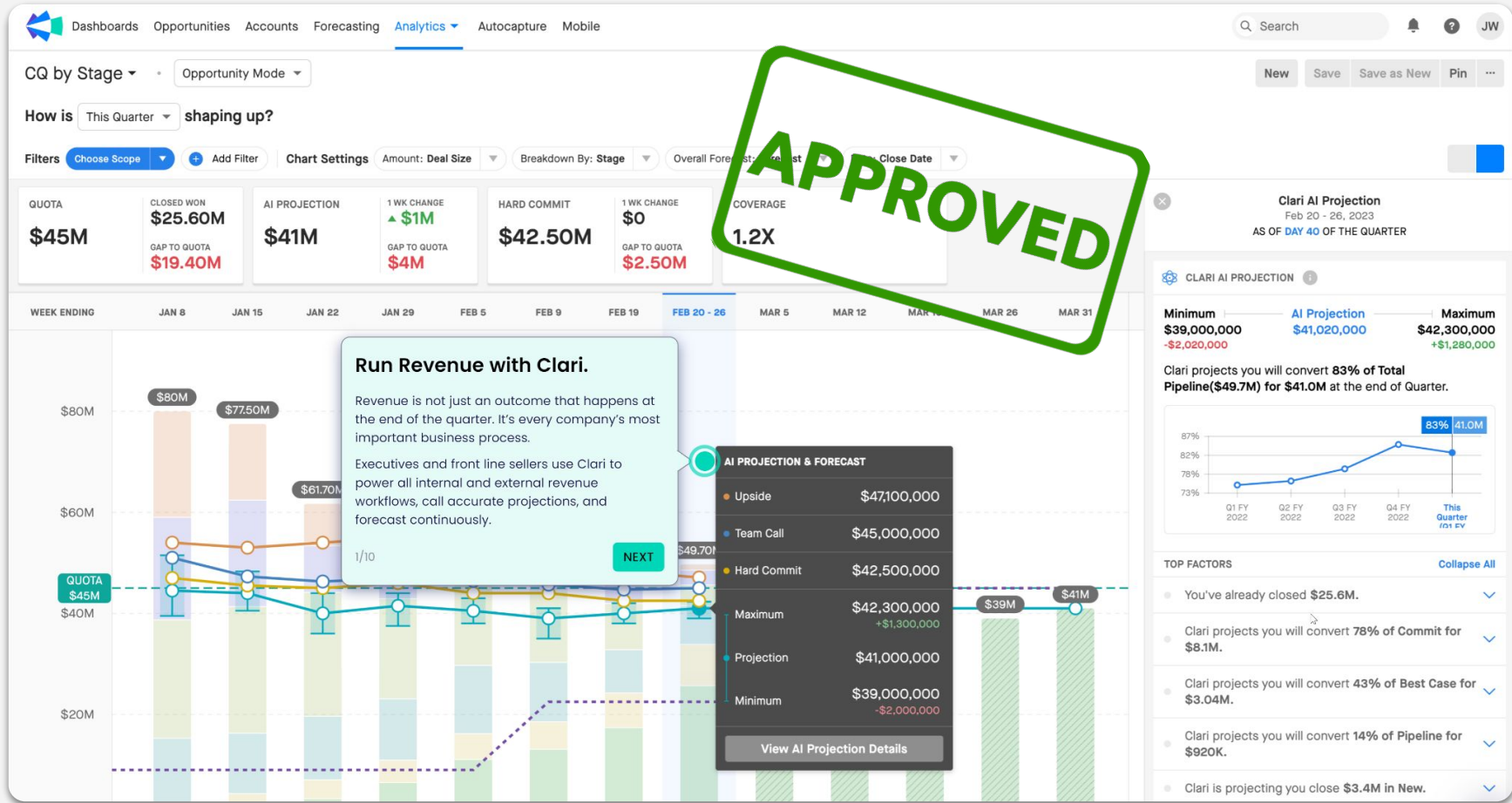
Bad Starting Point: Your general product homepage or a list of features.

Good Starting Point: A pre-recorded screencap of a successfully onboarded new customer within your system.

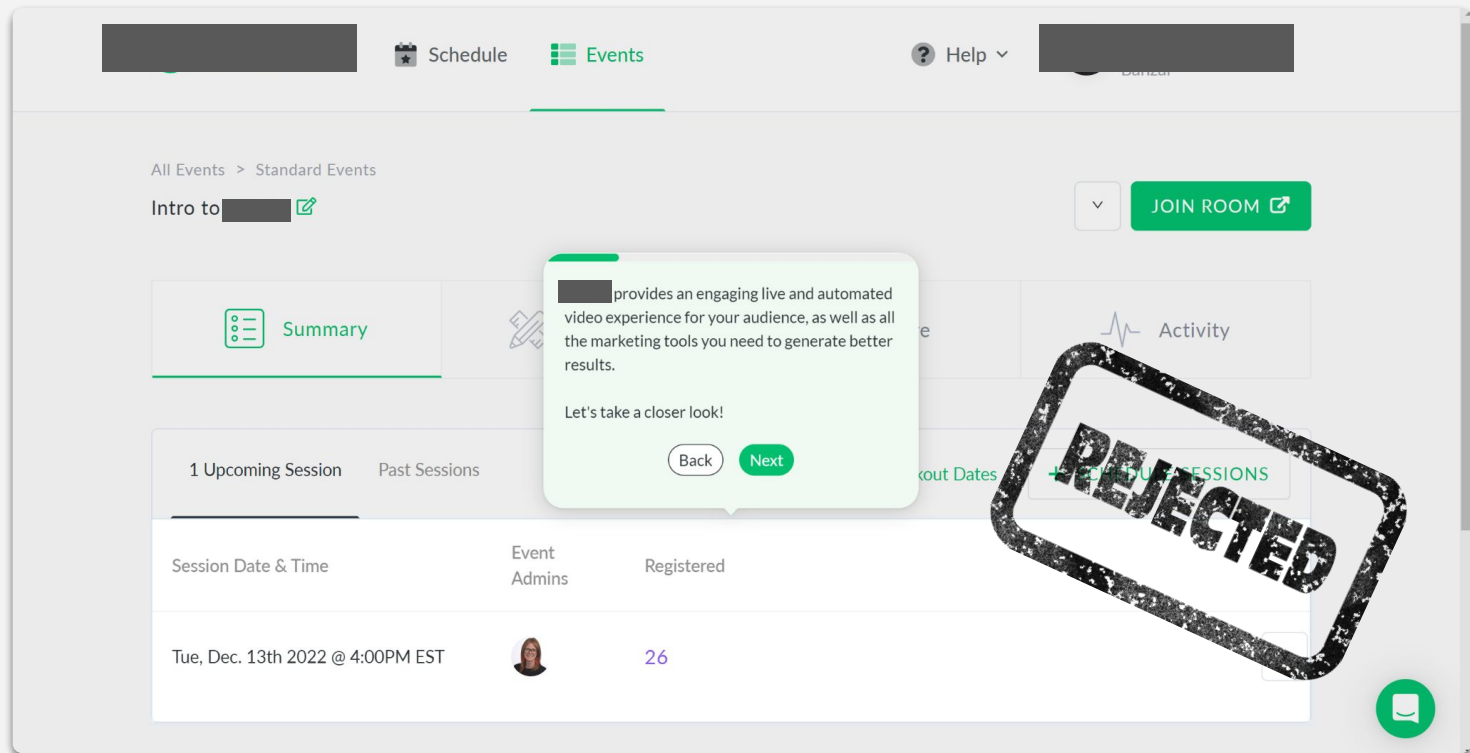
This immediately communicates the desired outcome and sparks curiosity about how your solution makes it achievable.

Extra Tip

Pre-Demo Teaser: Craft a short introductory sentence leading into your demo to further set the stage. For example, "Frustrated by complex onboarding causing customer churn? See how our solution gets your new clients up and running in record time."



Demo starting with full forecast and final figures!



What problem are you solving here?



#6 AVOID FEATURE-DRIVEN DEMOS

It's tempting to think a demo is the perfect time to showcase every impressive feature your product has to offer. However, this feature-centric approach can backfire spectacularly.

The most compelling demos ditch the feature focus in favor of solving customer problems. By framing your demo around the challenges your prospects face, you shift the conversation towards the transformative outcomes they seek.



DO

Clearly articulate the specific pain point you address with each feature or aspect of your solution.

Directly connect functionality to the positive outcomes and benefits for the customer.



DON'T

Recite a list of features without clearly stating how each solves a problem or improves the prospect's workflow.

Why it Matters:

Increased Relevance: Problem-focused demos immediately resonate with prospects. They see you understand their world and are focused on solutions, not feature bragging.

Value Over Price: You elevate the conversation beyond a checkbox comparison. Prospects understand the unique value you bring and how it justifies your pricing.

Memorable and Impactful: Stories about overcoming challenges stick with prospects long after the demo ends. A list of features fades quickly.

If you fall for the spray and pray approach, you are running in danger of the following issues:

The Comparison Trap: Listing features puts you on a dangerous path of direct comparison with competitors. Prospects start ticking off boxes on a checklist, making price a key deciding factor instead of the overall value you provide.

Lost in Translation: Technical feature descriptions rarely resonate directly with the business problems prospects are desperate to solve. You risk your demo feeling disconnected and irrelevant.

Missing the "So What?": Even if a feature sounds impressive, prospects may struggle to grasp the tangible benefit it offers them. This dilutes your message and weakens your value proposition.

The screenshot shows a data analytics dashboard interface. On the left is a vertical navigation menu with icons and labels for 'Dashboard', 'Formula', 'Workspace', 'Dictionary', 'Schedule', 'Incident', 'Setting', and 'Help'. The 'Workspace' item is highlighted with a yellow circle. A dark tooltip box is overlaid on the 'Workspace' icon, containing the text: 'Clicking on any of the items in the navigation panel will allow you to explore that section. Click "Workspace."'.

The main area is titled 'Query'. It features a search bar with the text 't(s) Any' and a 'Reset' button. Below this is a 'Global Filter' section with a funnel icon and a refresh icon. The 'Breakdown' section shows 'UTM Source' selected, with icons for refresh, download, and an 'Overall' toggle switch. Below the breakdown are several filters: 'Event' (dropdown), 'All Time' (dropdown), '2/27/2024 - 3/4/2024' (date range), and 'Subject None' (dropdown). An 'Execute' button is located at the bottom right of the query section.

A large, tilted, black stamp with the word 'REJECTED' in white, distressed font is placed over the right side of the dashboard. At the bottom of the dashboard, there is a section titled 'What sources are driving users into our product?' with a 'LIVE' indicator and a link icon. Below this title are icons for a line chart, a bar chart, and a 'Measure' dropdown. A date range '2/27/2024 - 3/4/2024' is also present. At the bottom right, there are two buttons: 'Add to Workspace' and 'PRODUCT TOUR' (with a '1' badge).

Explaining all menu items and where to click does not convey any value add for your customer.
This is no training!

INCIDENTS THREATS ALERTS

Agents Mobile Agents

Last 30 Days Threat mitigation status Not mitigated Incident status Unresolved In progress

Threat Actions Analyst Verdict Incident Status Group by Hash No Items Selected 814 Threat Groups

Status	Threat Details	Analyst Verdict	Incident Status	Endpoints	Reported Time
<input type="checkbox"/>	FreeTacos.docm	Undefined	Unresolved	Saratoga-191Y	Mar 4, 2024 • 12:22:49
<input type="checkbox"/> 242	mimikatz.exe (+241 More)	242/242 U...	242/242 U...	14 Endpoints / 5 Groups	Mar 4, 2024 • 12:32:47
<input type="checkbox"/> 4	Rubeus.exe (+3 More)	4/4 Undefi...	4/4 Unres...	Enterprise-4WUT	Mar 4, 2024 • 12:27:16
<input type="checkbox"/>	ResistancelsFutile.exe	Undefined	Unresolved	THEBORG	Mar 4, 2024 • 11:39:57
<input type="checkbox"/>	malicious.exe	Undefined	Unresolved	W2K19-AVCNT-STORAGE	Mar 4, 2024 • 11:31:32
<input type="checkbox"/>	Sodin.exe	Undefined	Unresolved	THEMELBOURNE	Mar 4, 2024 • 10:37:15
<input type="checkbox"/> 138	SharpChrome.exe (+137 More)	138/138 U...	138/138 U...	18 Endpoints / 3 Groups	Mar 4, 2024 • 09:21:59
<input type="checkbox"/> 106	AdFind.exe (+105 More)	106/106 U...	106/106 U...	17 Endpoints / 5 Groups	Mar 4, 2024 • 09:21:26
<input type="checkbox"/>	ResistancelsFutile.exe	Undefined	Unresolved	TheBorg	Mar 4, 2024 • 08:33:45
<input type="checkbox"/> 18	identity_attack_creds.bat (+17 More)	18/18 Und...	18/18 Unr...	9 Endpoints / 1 Group	Mar 4, 2024 • 08:02:17

Here's a curious one - 242 active instances of **Mimikatz**, a tool of choice for penetration testers and malicious actors alike. Let's dive in and see what we can uncover!

Next

APPROVED

Demo follows a nice story and use case; yet, a little more focus on the problem here could improve the message!

#7 CONTEXT IN SELF-GUIDED DEMOS

While self-guided demos allow for flexibility, it's crucial to remember prospects don't have a live presenter to set the stage for each screen.

Providing context through brief explanations is essential for a meaningful experience.



DO

Include a short introductory text blurb or overlay at the start of each demo section. Succinctly explain the screen's purpose, its role in solving the customer's problem, and what key benefits or actions are available.



DON'T

Launch directly into visuals without any framing. Prospects will feel disoriented and less likely to grasp the value of what they're seeing.

Why it Matters:

Eliminating Confusion: Contextual introductions ensure prospects understand why they're looking at a particular screen and how it connects to the larger problem-solving narrative.

Maintaining Focus: Clear explanations keep the demo aligned with the prospect's pain point, reinforcing the message that your solution is designed to address their specific needs.

Enhanced Engagement: When prospects understand the "why" behind what they're seeing, they remain invested and eager to learn more.

Bad Approach: Abruptly transitioning to a screen filled with customer data without an introduction.

Good Approach: A brief overlay stating, "Our centralized customer dashboard provides a 360-degree view of your client interactions. Let's see how you can quickly surface key insights."

Extra Tips

Use clear, concise language tailored to your target audience's terminology.

Avoid technical jargon that might obscure the core message of value and relevance.

The screenshot displays the Gnar.ly 2023 (NB) dashboard. At the top, a header bar includes the Gnar.ly logo, the title "Gnar.ly 2023 (NB)", and a navigation menu with icons for list, calendar, chat, and settings. Below the header, a "Main Metrics" section provides a snapshot of deal performance: Amount (\$14,500, up from \$9,200), Stage (Validate, 3 days in stage), Close date (Jul 31), Forecast category (Commit), Meetings to date (6, latest 3 days ago), Deal Vitals (5/5), and Deal age (61 days). A large green "APPROVED" stamp is placed over the top right of the dashboard.

A central tooltip box contains the following text:

Track a deal's progress in seconds 🕒

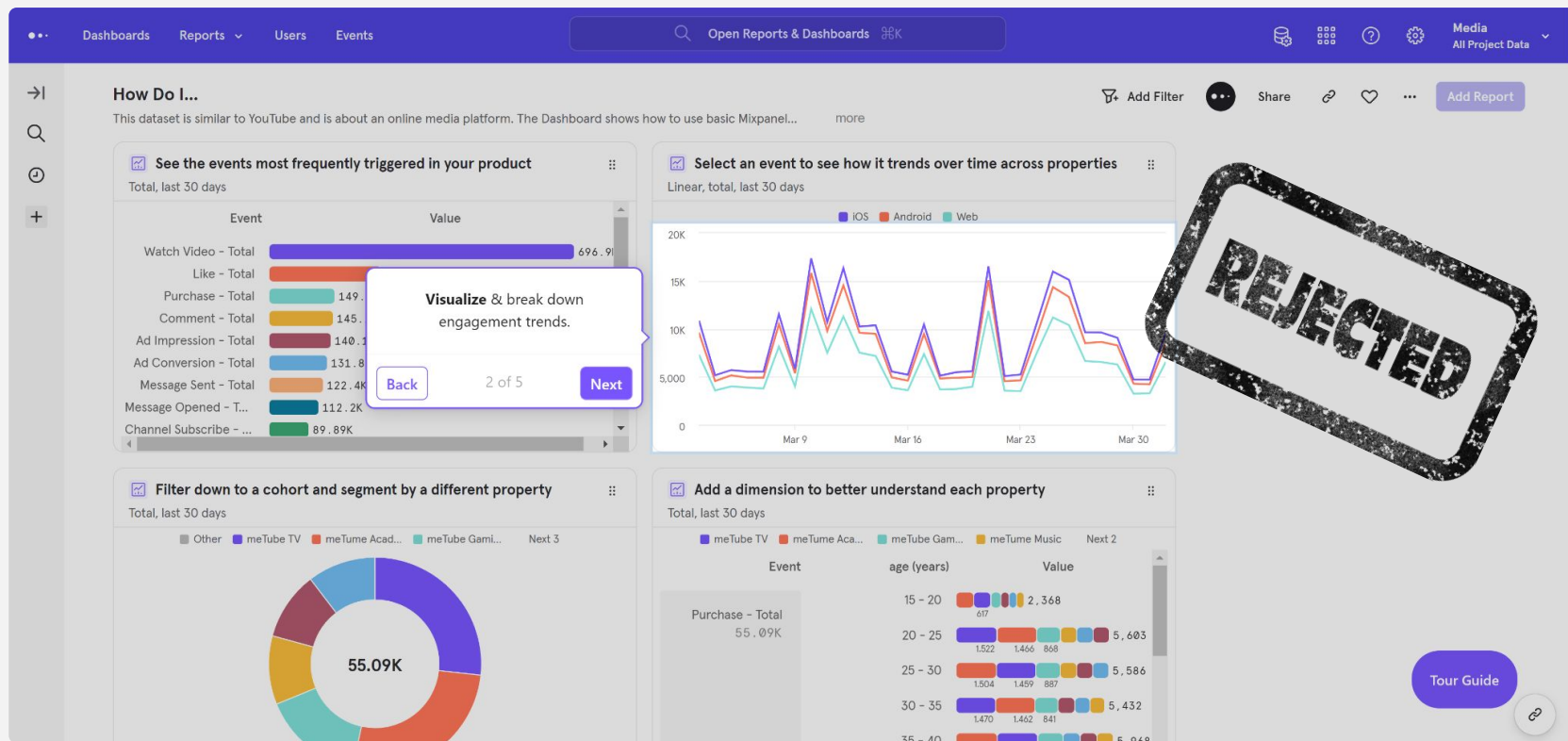
At a glance, learn how a deal has progressed, or hasn't, with **Main Metrics** and insights.

The tooltip includes "Back" and "Next" buttons and indicates "2 of 8" items.

The dashboard content is organized into several sections:

- MEDDIC fields:** A table showing fields in set (6), incomplete (2), and complete (6).
- Pains / Gains (MEDDIC):** A list of customer pain points and gains, such as "Currently only using email campaign to target customers" and "Wanting to diversify outreach methods".
- Success metrics (MEDDIC):** A list of success metrics, such as "Increase email response rate by 50%" and "Increase # qualified leads by 15%".
- Economic Buyer (MEDDIC):** A list of economic buyers, including Cameron Williamson and Jane Cooper.
- Champion (MEDDIC):** A list of champions, including Jane Cooper.
- Decision Criteria (MEDDIC):** A list of decision criteria, currently blank.
- Decision Process (MEDDIC):** A list of decision processes, currently blank.
- Plan of Action:** A list of action items, including "Recurring meeting with Gnar.ly - Tuesdays", "Seeing what pricing options we have (flexible payment, term discount, etc.)", "Send estimated workback plan so prospect is clear on current timeline", "Setting up a demo for supporting BU", and "Facilitate meeting to address Q's & C's".

Very brief explanation of the screen and its purpose - answering the "so what?" question



No context provided for this screen - tour goes straight into individual chart - and then another, and another...

#8 DEMO THE MOST EFFICIENT PATH TO VALUE

One frequent mistake when creating automated demos is an overly complicated demo workflow. Prospects crave solutions that make their lives easier, not add new layers of complexity. When demos get overloaded with feature tours or mimic everyday use of the product, several problems arise.

The most effective demos are laser-focused on delivering value. They prioritize a clear, efficient path that showcases the most impactful way to achieve the desired outcome.



DO

Begin with the outcome. Open your demo with the screen or feature that directly illustrates how your solution addresses the customer's biggest pain point.

Then, carefully design the most streamlined, logical path to illustrate the steps that led to that positive result. Prioritize showcasing ease of use over exhaustive technical demonstrations



DON'T

Don't: Replicate the complex, multi-step workflows that users might take during everyday use.

This adds unnecessary detail, obscures how quickly value can be achieved, and risks making your solution seem complicated.

Why it Matters:

The "Aha!" Moment: Again, immediately showcasing the desired outcome creates a powerful "aha!" moment, generating excitement and a strong desire in the prospect to learn how they can achieve it themselves.

Highlighting User-Friendliness: A streamlined demo filled with easy-to-follow steps reinforces the message that your solution is designed to save time and simplify processes. Busy prospects seek intuitive tools, and this demo style reassures them.

Overcoming Complexity Concerns: By showing the simplest path to achieving results, you proactively address potential anxieties about your software being difficult to learn or use.

Maintaining Focus: A concise demo focused on the essential actions ensures the prospect retains the key takeaway: Your solution delivers a powerful outcome without a steep learning curve.

Bad Approach: Walking through every form field, menu option, and setting a new customer might encounter in your software. This feels laborious and overwhelming.

Good Approach: Showcasing a successfully onboarded new customer, then demonstrating only the most essential and intuitive actions (perhaps 3-5 clicks) that lead to this outcome.



Back to

GET A DEMO

GET A FREE TRIAL

Dashboard

Assets

Asset Graph

Queries

Findings

Enforcement Center

Reports

Data Analytics

Cloud Compliance





Adapters

Activity Logs

Adapters

Adapt

Search Adapters...Search Categories...

Name	Connection Status	Description
 1E Tachyon		1E Tachyon is a remote endpoint management solution built on a single agent for speed, visibility, and control of all endpoints.
 1Password		1Password is a password manager providing a place for users to store various passwords, software licenses, and other sensitive information in a virtual vault.
 7SIGNAL MOBILE EYE 7SIGNAL Mobile Eye		7SIGNAL Mobile Eye is a Wi-Fi performance management and monitoring SaaS application that helps enterprises optimize wireless device connectivity.
 A10		A10 provides load balancing for application deliverability, availability, and security

The first step in compiling a complete asset inventory is connecting to existing tools in your tech stack—we call these Adapters.

supports over 800 Adapters in many different categories, including EDR/EPP, Networking, IoT, and much more. Scroll down to see all the different Adapters we support.

Back4 of 21Next

21 steps is likely a little too much to illustrate the efficiency of achieving success - this often is a cue that the framing is a little off the mark.

#9 VALUE BEFORE LEAD CAPTURE

It's natural to want to gather contact information early in the sales process.

However, prematurely asking for details can create friction and turn off potential customers. Focus on delivering value first to foster trust and increase the likelihood of getting qualified leads.



DO

Begin your demo by showcasing a compelling solution to the prospect's pain point.

Deliver an initial "aha!" moment before shifting into lead generation mode.



DON'T

Make contact details a barrier to entry.

Resist the urge to place a registration form as the very first obstacle before allowing demo access.

Why it Matters:

Improved Customer Experience: Prospects feel valued when you prioritize showcasing your solution over an immediate data grab. This builds goodwill and positive perception.

Higher Quality Leads: When prospects experience the potential benefits your solution offers firsthand, they're more likely to provide contact details willingly and be genuinely interested leads.

Long-Term Trust: This value-first approach demonstrates confidence in your product and reinforces the idea that you're focused on the prospect's success, not just collecting leads.

Bad Approach: A demo landing page with a prominent form requiring name, email, company, role, etc., before any access to the demo.

Good Approach: A landing page highlighting the problem your demo solves with a teaser of the solution to come.

A simple "Start Demo" button leads to the initial compelling view, with a contact form introduced towards the end.



don't
just take,
give.

The image shows a screenshot of the Vitally CSM Team Hub interface. A large, tilted, black and white 'REJECTED' stamp is overlaid on the right side of the screen. In the center, a white modal form titled 'Access the tour' is displayed. The form asks for 'Name', 'Email', and 'Company' details to access a tour. Below these fields is a checkbox for 'I have read and accept the terms and conditions.' and a 'Submit' button. The background interface includes a sidebar with navigation links like 'My Tasks', 'Notifications', 'Search', and various 'Hubs' (My Hub, Leadership Hub, Onboarding, CSM Team Hub, etc.). The main content area shows a 'TASKS' section with a list of tasks (Review, Schedule, Churn) and a 'DAILY FOCUS AREAS' section with a large '0' and a 'Pending Conversations' section with a message from 'Kenyatta - Interested in a Pied Piper demo?'. A table on the right shows data for 'Created On', 'Duration', and 'Status'.

Vitally CSM Team Hub TODAY

My Tasks
Notifications
Search

Hubs
My Hub
Leadership Hub
Onboarding
CSM Team Hub
CSM Hub Homebase
TODAY
Upcoming (Strategic)
Past (Performance)
Renewals
Product Team

Access the tour
Please provide a few details to access this tour of

Name
Your Name

Email
your.name@email.com

Company
Your Company

☐ I have read and accept the [terms and conditions.](#)

Submit

REJECTED

TASKS
Due > Today
TASK
Review
Schedule
Churn

DAILY FOCUS AREAS
Outdat...
0

Pending Conversations
MESSAGE
Kenyatta - Interested in a Pied Piper demo?
Hi Kenya, Now that you've had some time to play around with Pied Piper, I just wanted to reach out and see if I coul...

Kenyatta Hyatt
CrowdTwist
in 7 days
Unknown

Created On	Duration	Status
Sep 7, 2023	0 days	Churn ...
Sep 9, 2023	-1 days	Active Onboar...

Please don't ask for contact details at the beginning of the tour; most vendors offer to ask for details later on!

#10 AVOID TOO MANY CALLS TO ACTION

Bombarding prospects with multiple CTAs throughout a demo experience can backfire. Too many options lead to confusion, dilution of your core message, and ultimately, decision paralysis on the part of the prospect. Streamlining your CTAs is essential for conversion success.



DO

Determine the primary goal of your demo and align your CTA with that objective.

Frame it as the logical next step for the prospect.



DON'T

Overwhelm prospects with a list of possibilities. Avoid pushing "schedule a demo," "start free trial," and "explore more" all at once.

Why it Matters:

Reduced Friction: A single, compelling CTA creates a smooth and intuitive experience for the prospect, guiding them towards the desired action.

Goal Alignment: Focused CTAs help you achieve specific objectives. It clarifies whether you want to capture leads, drive trial sign-ups, or book consultations.

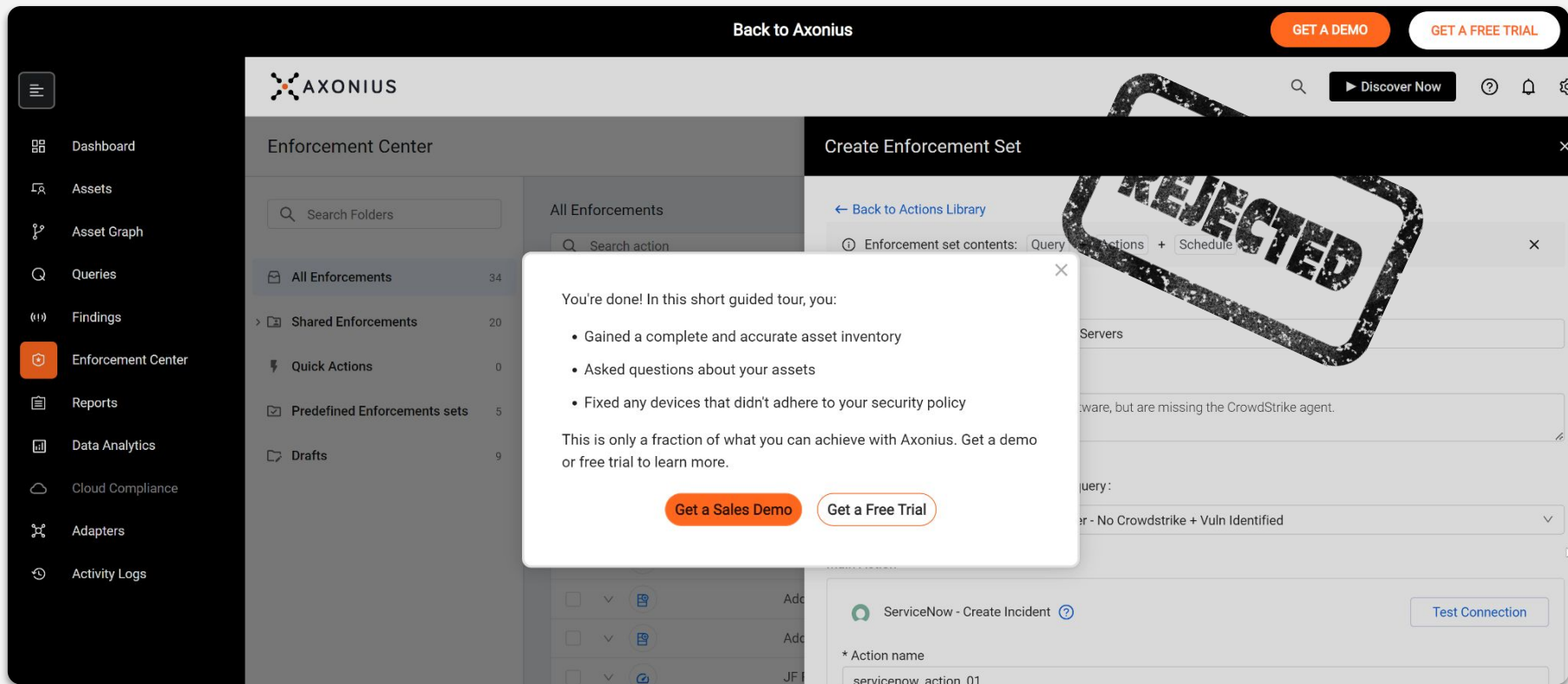
Improved Conversion Rates: By making it clear what you want the prospect to do, you increase the likelihood of them completing the desired action.

Bad Approach: Ending a demo with "Start your free trial now!" "Schedule a live demo!" "Explore more case studies!" This scattershot approach leaves the prospect unsure where to focus.

Good Approach: If lead generation is the primary goal: "See how [product name] solved similar problems. Leave your email for tailored use cases."

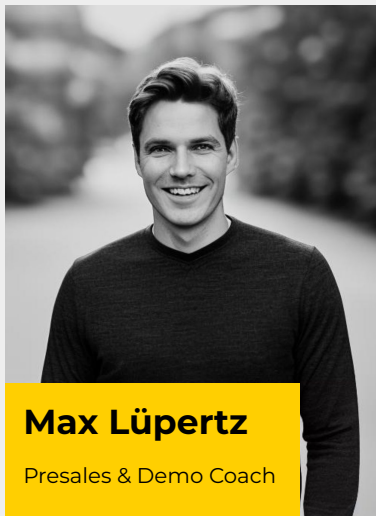
Extra Tip

Consider using dynamic CTAs based on the prospect's engagement level with your demo. Someone who spends significant time exploring might be presented with a more high-touch CTA (like scheduling a live demo) compared to someone who briefly skimmed.



Better focus on one CTA based on what you think is most important to guide your customers and help them progress with their decision!

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Unlock Your Presales Potential

As a (pre-) sales coach, my mission is to unlock the potential in presales in competitive enterprise software sales.

Elevating presales and solution engineers as key players, they can become your '**Unfair Advantage**' in closing more enterprise deals.

This strategy involves guiding your customers through their journey with a focus on more than just product expertise, offering a unique buying experience that truly sets you apart in the market.



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MORE.**

SOFTWARE DEMO AUTOMATION PLAYBOOK

**PRESALES
ROCKS.TARS**