SOFTWARE DEMO CHECKLIST

Increase End User Adoption While Looking Like a Rock Star!

The fastest way get positive recognition and succeed is to increase your presentation skills.

Let's be honest, **very few of us have been formally trained in software demonstrations**. According to Anders Ericson, a leading expert in high performance, innate talent is not the secret to mastery. The key to mastering anything is deliberate practice designed to optimize improvement. (http://projects.ict.usc.edu/itw/gel/EricssonDeliberatePracticePR93.pdf)

The first step is **learning the basics and skills so you know how to improve**! I can't emphasize enough that requirements gathering and understanding the challenges of the end users is the most important part! We can't cover all of that in a checklist unfortunately.

The second most important thing is to **craft your storyline to engage your audience in how you will solve their pain**. Too many people focus on the technology and show features and functionality, but all that does is make the solution look overwhelming.

Let's get you started with our basic Software Demo Checklist. The detailed explanations of the items are listed below.

For more information, email us at Coaching@LodestarSolutions.com

Demo Checklist

PRE WORK

- ☐ Research Department / Company
- ☐ Requirements Gathering
- ☐ Requirements Checklist
- ☐ Create Your Storyline
- ☐ Practice, Practice, Practice
- ☐ Send Meeting Invites
- ☐ Assign a Wing Man
- ☐ Record Practice Video
- ☐ Create a PowerPoint of Slides and Screens
- ☐ Reminder Email Day Prior
- ☐ Test the Internet Connections in Room a Day Prior

PRESENTATION

- ☐ Creative Introductions
- ☐ Validate Requirements
- ☐ Bounce to Engage Them in the Story
- ☐ Tell Them What You are Going to Tell Them
- ☐ Show Them (Less is More)
- ☐ Summary of What Pain You Solved
- ☐ Call to Action

ROOM & TECHNOLOGY

- ☐ Technology Setup ie Webex, GoToMeeting
- ☐ Microphone
- ☐ Camera
- ☐ Camera Angle
- ☐ Background, if Virtual
- ☐ Lighting (Natural Window is Best)
- ☐ Moderator Assigned if Multiple Locations
- ☐ Check Screen Size
- ☐ Record Meeting

POST WORK

- ☐ Follow Up Email with Summary / Video Link

Demo Checklist

PRE WORK

- ☐ **Research Department / Company -** Get on Google and LinkedIn to start learning about the organization, people in the department, and strategic goals of the organization. If you can tie your solution into the strategic initiatives, you will look like a rock star.
- ☐ **Requirements Gathering -** This is the most important step and the most challenging as it can be difficult for end users to communicate what they really want. Unfortunately, the topic is too massive for me to cover completely in this checklist, but I am a big fan of giving people a stack of sticky notes and have them spend 10 minutes brain dumping what they want in a solution. Then as a group I have them prioritize them. When I do this, I set a timer. It's amazing what you can accomplish in a small amount of time when the timer is running.
- ☐ **Requirements Checklist -** I like to provide the client or end users a checklist that has them rank requirements we typically see and those they defined in the Requirements Gathering Session from 0-10. This helps me understand the importance of each one and focus on the big issues during my demo.
- ☐ **Create Your Storyline -** For thousands of years, history has been passed from generation to generation through stories because people remember them. You want to be memorable, so make sure you are creating a story for your audience to engage in. I have found that once I know my story and practice it, I am more confident that I won't forget something important because I remember stories better too.
- ☐ **Practice, Practice, Practice -** So many people think they know the technology, so they believe they don't need to practice. Failure to practice means you are practicing to fail. I recommend actually recording your dry runs and playing it back to learn. The first time you watch yourself it will be very painful, but that's how you improve!
- ☐ **Send Meeting Invites -** Sending a meeting invitation with login instructions or location and why they should attend seems basic, but many people forget to do it. I also like to send a polite reminder email the day before. While giving your demo, be respectful of time. Don't go over and if anything, end early. Your final closing call to action is essential to increase end user adoption, so you don't want to run out of time and not be able to tell them what to do next.

PRE WORK - Continued

- ☐ **Assign a Wing Man -** I like to have a wing man that knows enough about the solution that they can redirect the conversation if I'm having an issue. Before you start your demonstration, have a team member that knows that if you start to have problems and you have to cover the screen, that they are to walk to the back of the room and take over control of the conversation. They can ask a probing question or they could reiterate what you've showed them so far. The reason you want them to walk to the back of the room is so the audience is focusing away from you and the blank screen. This will reduce a lot of stress as you try to fix the problem. When it is clear that your problem is resolved, you can take back the conversation.
- ☐ **Record Practice Video -** I always like to have a recorded version of my demo that I can use in the event I experience a demonstration disaster. Typically, during my practice sessions, I will record the session so I have it as a backup. To do this, I use Camtasia, a simple to use recording software. Camtasia allows me to record my screen, edit any mistakes and create an MP4 file. I always recommend using a quality microphone when recording demonstrations with Camtasia. You can get a decent microphone like a Blue Snowball mic or an Audio-Technica microphone on Amazon. If you want to get fancy, you can even shoot an introduction video of yourself with your iPhone to put in the beginning of your video. With Camtasia, this is simple to do. In the event you do not have a demonstration disaster, you can use this recorded video for anyone that missed the meeting or anyone that would like to see it a second time. Note, you will want to make sure you have a copy of the video on your laptop as well as someone else's to ensure that if your computer crashes, you can still wow your audience with your demonstration.
- ☐ **Create a PowerPoint of Slides and Screens -** If you do not have time or the tools to record a video, take screenshots of your demonstration and put them in PowerPoint. This will allow you to have a backup that you can use to walk your audience through your story, demonstrating the power of your solution through PowerPoint. You can also use the PowerPoint deck to send out to attendees after the demonstration to remind them of your presentation.
- ☐ **Reminder Email Day Prior -** Remember to state the goal of the meeting and reiterate the time and location or login instructions.
- ☐ **Test the Internet Connections in Room a Day Prior -** Don't start off on a bad note being frustrated by not being able to connect to your server or experience ports you need open blocked in that particular room. So test your connections or have someone else test them for you.

PRESENTATION

- ☐ **Creative Introductions -** You want to energize the group, so I find it's best to have a fun introduction. Often times, I have them introduce themselves and tell me their proudest moment. By vocalizing their proudest moment, their physiology, or body chemistry, actually changes in a positive way. Another fun introduction is 2 truths and a lie where each person says two true facts about themselves and one lie, then people guess which comment is the lie. Watch out as this can eat up a lot of time, but in smaller group can be fun and get people to connect.
- ☐ **Validate Requirements -** I always start by reviewing what we learned in our initial requirements session. You never know when a priority has changed. If time permits, I like to use sticky notes to list the priorities and have them share what they want to see during the demo. Then at the end, I make sure we covered everything. If we don't have time, the open items are part of my follow-up.
- ☐ **Bounce to Engage Them in the Story -** Suck them into your story with bounce. Bounce is when you start to tell a story and you include them. It often starts with, "You know when you…" The audience is immediately thinking of a time that happened to them. I've found bouncing results in the audience joking that I must be spying on them or stating "Are you sure you have never worked in our department? I swear you are talking about us." That's when you know bounce works.
- ☐ **Tell Them What You are Going to Tell Them -** You want to start priming the pump so to speak. Give them a high level summary of what you will show them and how it will solve the challenges or pain they are currently experiencing.
- ☐ **Show Them** (Less is More) **-** This is where you tell the story while showing the solution. Remember less is more! Watch that you are not moving the mouse too much. If something bad happens, don't highlight it and make sure your wing man is right there to divert attention if needed.
- ☐ **Summary of What Pain You Solved -** This is the wrap up to remind them what you just showed them and how easy the solution is to use.
- ☐ **Call to Action -** Always conclude with some type of call to action or next step. Maybe you ask them to give you dates for their formal training. If you are in sales, maybe it's a meeting to define the final configuration of licenses. Always have a call to action.

ROOM & TECHNOLOGY

- ☐ **Technology Setup ie Webex, GoToMeeting -** Be familiar with your technology for the web meeting and watch out for updates that can screw you up. Always do a dry run. Ensure your web meeting doesn't have a limit on the number of attendees that is less that your attendee list as you don't want people getting locked out. I recommend having the ability to mute everyone during the meeting as the background noise gets annoying. You can ask attendees to raise their hand or use the chat feature if they have questions during the presentation. If people are going to cluster in various conference rooms, have someone test the connection, projector, and speaker phone in each of the rooms at least a day prior to the demo.

- ☐ **Microphone -** Use a good microphone. Don't rely on the mic in your computer. You can get a good microphone on Amazon. I use both a Blue Snowball mic and an Audio-Technica mic.

- ☐ **Go On Camera -** I know it's scary, but turn on your web camera and let them see you! They will immediately feel connected to you. It's argued that 93% of communication is non-verbal and it's a lot easier to show your excitement with your facial expressions. Typically, the audience will not be on web camera, so you won't see them but you can be so much more engaging when they see you. A couple tips on web camera:
  - **Camera Angle -** Camera angle is very important as it's like a selfie. You want the camera higher up so it eliminates any extra chins and a nostril shot is never a good thing. You might have to prop your camera up on some books. My Dell laptop has the camera way down in the lower corner (whoever thought to put it there?) so it almost always needs to be propped up!
  - **Background, if Virtual -** Look around to see what's in your background. Does it convey the professional image you want to be known for?
  - **Lighting -** The brighter the light, the better. Natural light from a window can make you look amazing.

ROOM & TECHNOLOGY- Continued

- ☐ **Moderator Assigned -** If your audience is clustered in various conference rooms at different locations, confirm in advance that they have a good speaker phone and designate a moderator at each location. They will be in charge of facilitating any questions, connecting a computer to the projector, logging in to the meeting, and helping you read the room. They should alert you if the group seems confused or has questions.
- ☐ **Check Screen Size -** Make sure the screen size is not too small on their end. The various web meeting tools can mess with the display settings. Ensure before you start, that the size of screen for the audience is something they can see. Especially if people are in a conference room.
- ☐ **Record Meeting -** I like to record the meeting with either GoToMeeting or Camtasia so if anyone misses the meeting, they can watch it. This also saves me time from having to do multiple demos. If you are in a conference room, you will want to have a good mic connected and set it to omnidirectional setting, this will help pick up all the conversation. The Blue Snowball mic is relatively inexpensive and works great.

POST WORK

- ☐ **Follow Up Email with Summary / Video Link -** I recommend you record your session and put it on a shared drive for anyone that wants to see it again or so anyone that missed it can access it. I also like to send a follow up email with a brief summary and the link to the video. In the email, you want to remind them what the next step or the call to action is. You might want to ask them to rate your presentation by stating, “I am trying to improve my presentation skills and would find your feedback very valuable to help me grow. What topics or areas do you think I could work on to help me become a master presenter?” Even if you get one person to answer, you are better off. Remember most people fear public speaking, so they will admire you for working on it.