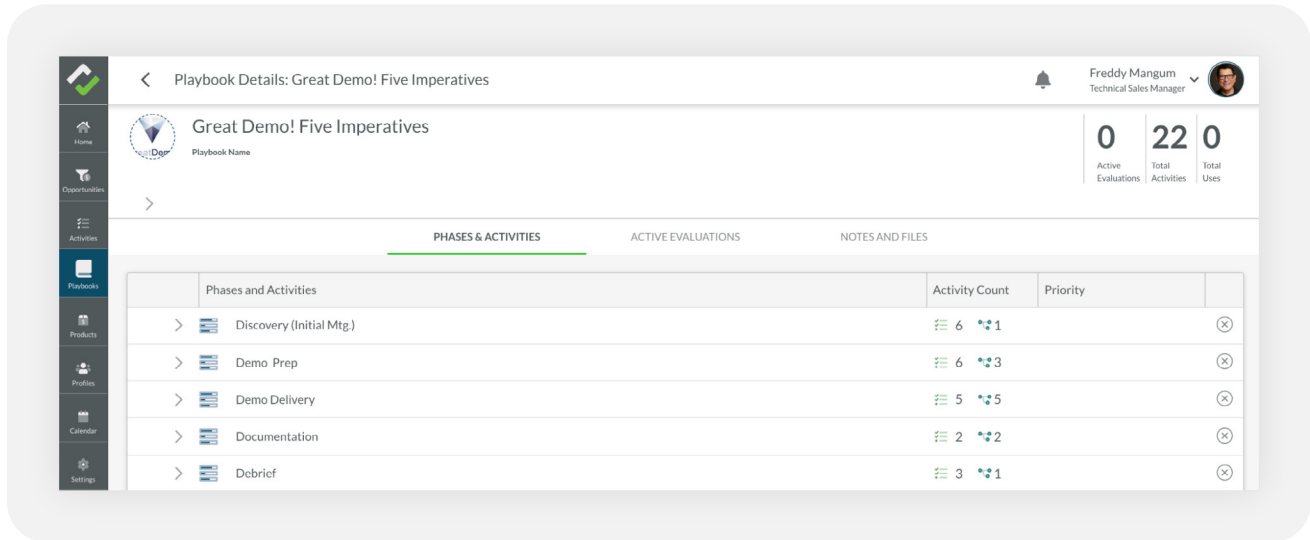


The Sales Engineering Methodology: Great Demo! 5 Imperatives



For decades, [Great Demo!](#) has provided training to sales engineering staff, managers, and presales leadership that dramatically increases their success in closing business through substantially improved software demonstrations. Offered via workshops, webinars, seminars and coaching, the training draws upon the experiences of thousands of demonstrations, both delivered and received from vendors and customers.

Based on this experience, [Paul H. Pearce](#), a Great Demo! Training partner, created a proven sales engineering methodology called the "Great Demo! Five Imperatives." The methodology is now available within the [Hub](#) unified presales productivity platform to help sales engineering organizations consistently uplevel their performance.

To illustrate how sales engineers can utilize the Great Demo! Five Imperatives playbook within the Hub platform, we show a prescriptive set of steps below that a presales engineer should follow in context of the opportunity they are working on. Think of it like a pilot's checklist before takeoff. When sales engineer professionals follow each critical step, they effectively establish value and increase win rates for their offerings.

According to Pearce, "If you want to be a world-class company, you must have a world-class process. World-class companies grow 10X faster than their competition, primarily because of their ability to shorten the learning curve of new employees through automation of best practices. The five imperatives provide the process and repeatable methodology. Hub provides the automation of the process and the intelligence to accelerate best practice refinement."

Let's expand and examine each of the Great Demo! Five Imperatives more closely.


First Imperative (I1): Discovery































The greatest foundation to any sales campaign is rooted in discovery. From building rapport and trust to truly understanding a client's situation, this first imperative helps ensure you have a sales opportunity that is qualified and that you have the information you need to prepare for a winning demonstration. To carry this out successfully, you'll need to identify important pieces of information, including the key components of a Great Demo! Situation Slide. These include fully understanding the client's critical business issue (CBI), the current pain and/or problems they are facing, an understanding of the specific capabilities needed to solve those problems, when those problems need to be resolved, and how much value the client will receive when problems are solved.

Proper discovery also includes the technical background and system preferences of the buyer as well as an understanding of the client's buying authority.

Large buying committees remain a prominent trend and challenge in enterprise sales. Knowing the role and biases of each decision maker is key to understanding how and what to present and demonstrate to each one of them. Different groups and individuals may have different CBIs, different problems and unique ways of realizing value. Before you can effectively prepare a winning demo, you must know how each decision maker and group perceives value and what each one needs to recommend a solution.

The illustration below highlights the steps in the discovery phase required to determine that you have the information you need to prepare the demonstration effectively.



	Phases and Activities	Activity Count	Priority
	 Discovery (Initial Mtg.)	 6  1	
>	 Build rapport with customer	 1	 Medium Priority
	 Understand Customer Critical Business Impact		 Medium Priority
	 Discover the Economic Buyer and the process how they purchase		 Medium Priority
	 Understand how our solution solves the problem		 Medium Priority
	 Understand and acknowledge the win Criteria		 Medium Priority
	 Understand how win Criteria will be measured		 Medium Priority
>	 Demo Prep	 6  3	
>	 Demo Delivery	 5  5	
>	 Documentation	 2  2	
>	 Debrief	 3  1	































Second Imperative (I2): Demo Prep

Robert Schuller once said that spectacular achievement is always preceded by unspectacular preparation. There is always a good amount of behind-the-scenes preparation, and it is easy to rely on the information previously captured for a demo. However, for you to achieve greater levels of success, each demo should be tailored to highlight the client's information and processes. One of the goals of a demonstration is to dispel any client concerns and convince the client that your solution will solve their challenges. They need to visualize themselves using your solution, which means that preparation is a critical step that must be fully supported.

A key step in preparation is to ensure your demonstration environment is up to date and ready. Do you need to reserve a system? Do you need to modify its look and feel to represent your client's environment? Before continuing to the next phase of the methodology, consider your true understanding of the client's situation. The methodology suggests that in this phase you should assemble, create or perform the following:

- A demo outline and agenda
- A menu of the possible demo scenarios needed
- Situation slides and illustrations for all major areas of your demonstration
- Your "Do It" and "Follow-on" demo pathways
- Your data to reflect the client's data
- Customer reference stories highlighting the value your organization creates
- Your engagement techniques, e.g., probing questions and/or polls
- Readiness To challenge and/or teach your client something. Can you re-engineer their vision for a preference of a capability that only your organization can deliver?



	Phases and Activities	Activity Count	Priority
>	 Discovery (Initial Mtg.)	 6  1	
⌵	 Demo Prep	 6  3	
	 Confirm and Agree on Demo Agenda/Objectives		 Medium Priority
>	 Understand customer setup/infrastructure	 1	 Medium Priority
	 Build Demo Environment		 Medium Priority
>	 Prep/Update Demo Data	 1	 Medium Priority
	 Demo Dry Run		 Medium Priority
>	 Sales/Account Team Sign Off	 1	 Medium Priority
>	 Demo Delivery	 5  5	
>	 Documentation	 2  2	
>	 Debrief	 3  1	

Third Imperative (I3): Demo Delivery

You've done the hard prep work. Now It's showtime! By the time you complete this third step, you should feel confident that your demo presented a solution that would provide significant value to your client. During the demo, show the highest priority items first in your demo. And be sure to ask questions along the way. This allows you to present a dynamic demonstration that puts your client's needs first. Asking questions and being conversational helps in other ways, too. You can learn in real time how your audience perceives the value of your solution and what additional information they need to make a decision.

	Phases and Activities	Activity Count	Priority
>	Discovery (Initial Mtg.)	6 1	
>	Demo Prep	6 3	
⊙	Demo Delivery	5 5	
>	Know the Audience	2	Medium Priority
>	Confirm Customer Situation/Use-Case		Medium Priority
>	Presentation Flow	1	Medium Priority
>	Summarize All Major Demo Points	1	Medium Priority
>	Feedback	1	Medium Priority
>	Documentation	2 2	
>	Debrief	3 1	

Fourth Imperative (I4): Documentation

Presales teams and consultants often feel that once the demonstration is over that their contributions diminish, yet there are several additional steps to consider. Research shows that nearly 75% of what you present in a demonstration will be forgotten by your audience within a week. The fourth imperative, therefore, includes follow-up steps with your clients to ensure they retain the most critical parts of your demonstration. Share the situation slides and illustrations you created in the second imperative with your clients. This empowers them to share the highlights of your demo, including the value you established, with others within their organization, particularly the aforementioned buying committees.

	Phases and Activities	Activity Count	Priority
>	Discovery (Initial Mtg.)	6 1	
>	Demo Prep	6 3	
>	Demo Delivery	5 5	
⊙	Documentation	2 2	
>	Send Follow-Up Material	1	Medium Priority
>	Schedule Follow-Up Mtg.	1	Medium Priority
>	Debrief	3 1	

When you consider the customer lifecycle within your organization, one of the largest opportunities for long-term success and value creation for your client begins in the implementation phase. The fourth imperative ensures your follow-up activities have been discussed, organized and executed to enable your client for a successful implementation. Proper documentation of the critical business issues, the pain the customer experienced, and the value created by your solution is vital to ensuring a successful implementation. When documentation is created and shared, implementation and support projects can focus on solving the client's CBIs, and the solution's value and your referenceability are enhanced.

Fifth Imperative (I5): Debrief

No deal is complete without a thorough debrief of the opportunity. This imperative ensures that best practices are discussed and reinforced between all parties that were involved in the sales cycle. This stage allows the team to acknowledge and discuss ongoing technical risks, discuss what went well that should be repeated, what should be excluded next time, as well as things that were not done that might be considered. With this information, you can ensure your next sales cycle is improved and that the team learns from every campaign.

Phases and Activities	Activity Count	Priority	
> Discovery (Initial Mtg.)	☰ 6 1		⊗
> Demo Prep	☰ 6 3		⊗
> Demo Delivery	☰ 5 5		⊗
> Documentation	☰ 2 2		⊗
Debrief	☰ 3 1		⊗
> Acknowledge Technical Risk	1	Medium Priority	⊗
Discuss what went well		Medium Priority	⊗
Discuss Areas for Improvement		Medium Priority	⊗

Summary

Great sales engineering performance requires not only experience, but executing proven methodologies that have been established and refined over time. Utilizing the Great Demo! Five Imperatives within the Hub platform enables both seasoned and new presales engineers to follow critical steps throughout each sales campaign. With presales performance and metrics tracked automatically within the system, Great Demo! and Hub are aligned to increase sales velocity, collaboration and growth.

If you are interested in learning more about how you can utilize the Great Demo! Five Imperatives and/or the Hub unified presales productivity platform, feel free to visit either provider anytime to learn more.



Paul H. Pearce has over 20 years of leadership experience in Sales, Presales, Field Enablement, and Business Development. As the first certified Great Demo! training partner, he has mastered the methodology and today contributes to its ongoing success having recently authored the industry's newest Presales Methodology called the "Great Demo! 5 Imperatives." Paul has consulted and trained dozens of organizations, hundreds of Presales Consultants and recommends ways to increase sales through proven methodologies and real-world experience.



Hub provides the most comprehensive SaaS solution to help technical sales professionals win more business. For more information visit www.hub.inc



Great Demo! helps software organizations make their demos surprisingly crisp, compelling, and successful. For more information visit GreatDemo.com