



A Presales Leader's Guide to Influencing Sales Strategy

How to claim your seat at the table as an essential part of the revenue organization with a comprehensive demo program

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What is a “Demo Program,” and Why Do Demo Programs Matter?

A **demo program** is a top-down approach to building, centralizing, sharing, and analyzing product demos. Companies that invest in demo programs are usually interested in weaving high quality product experiences into multiple touchpoints across the prospect journey, with the goal to accelerate sales cycles and ultimately grow revenue. Effective demo programs improve go-to-market productivity through scalable, measurable, and repeatable demos.

Demo programs, like the presales role itself, can vary widely between companies. Despite their various approaches and implementation paths, the common thread is this:

Well-constructed demo programs empower presales teams to make a greater impact on the business.

This impact is usually measured in one of the following ways:

- 1** **Faster, shorter sales cycles:** Demo programs put product into the hands of prospective users early and often throughout the buying journey. Prospects are better equipped to self-qualify early on, and to educate themselves without needing 1:1 guidance from a presales resource -- which we all know can be a bottleneck when presales skillsets are in limited supply. Demo programs also make it easy to share product experiences with stakeholders across the buying committee asynchronously, without the headache of scheduling (and often rescheduling) time for multiple live, bespoke meetings.
- 2** **Presales efficiency gains:** By standardizing the demo process and packaging up demo resources that can be tailored and shared at scale, presales teams spend more of their time on the outliers – highly strategic and/or well qualified prospects that warrant their technical expertise.
- 3** **More consistent messaging:** Demo programs ensure the entire team is aligned on core messages and how they articulate the benefits of each feature, which improves positioning and brand strength.

Demo Programs Take Different Forms

Each company may have a unique interpretation of what a demo program entails, depending on their product, selling motion, team, and other factors. Many demo programs encompass multiple use cases including customized live demonstrations, guided product tours, sales leave-behinds, and dedicated demo or sandbox environments.

But most demo programs start with a single use case – which usually aligns with the biggest pain point or bottleneck in their go-to-market motion – and expand into a scalable, repeatable program.

Here are a few of the most common approaches we've seen at Reprise, where we've helped [hundreds of organizations](#) stand up enterprise-grade demo programs.

Starting Point A: Grow the Funnel with Interactive Product Tours

Many organizations today are under pressure to generate more leads with leaner sales and presales teams. Meanwhile, buyers increasingly are PLG-forward and want on-demand, self-service options to see and try software products before engaging with a human. The culmination of these trends is leading more and more SaaS providers to launch demo programs, starting with interactive product tours.

[Interactive product tours](#) are on-demand demos that provide a self-guided product experience. Buyers can understand how products work at their own pace and on their own time, allowing them to wait to engage with a salesperson until after they've self-qualified. For SaaS providers, product tours have become a lead generation engine that allows sales and SE staff to spend their time with more qualified leads instead of chasing the top of the funnel.

[Pendo is one example](#) of a SaaS provider that launched a demo program with product tours, after deciding they needed an easier way to showcase their product experience platform than by spinning up trials, which often required presales support.

Today, Pendo's website serves more than 40,000 product tours per week. Their product tour library has become the highest performing CTA on the Pendo.io website, and trial support is reserved for well-qualified prospects.

Organizations that begin with product tours focus initially on measuring their success based on top of funnel growth and marketing conversions, and then often expand that library of demos into shared resources for a sales team. Integrating with CRM and marketing automation tools is important for demonstrating ROI. Once value has been realized, many teams widen the aperture of their demo program's impact further down the funnel, whether via live demo support or sales leave-behinds (or both).

Starting Point B: Accelerate Opportunities with Customized Live Demos

Companies with complex technology products and/or those selling to a diverse customer base (i.e. covering a wide range of industries) often rely on live **product demonstrations** as the linchpin of every sales cycle. Live demos are instrumental in showing how to apply the technology to a particular use case and/or company, but it's time-consuming and costly to maintain multiple dedicated **demo environments**.

Lining up the right resources, preparing, and delivering custom demos mid-funnel can become quite the bottleneck. Many organizations end up with a demo environment that doesn't include the latest and greatest features simply because keeping the **demo environment** up to date with every new feature that's released becomes a backlog task that falls down the priority list.

This was the case for eCommerce solution provider Digital River when they decided to bring in a demo creation platform. They'd historically relied on sales engineers to set up demo environments before each live demo, which required some effort to adapt the environment to be customer-facing, since some demo environments served multiple purposes. They couldn't jump into a demo on the first call, which created risk of losing a prospect between the first call and second.

Implementing a demo creation platform has transformed the Digital River team's ability to showcase the product in early sales cycles. Sales reps can now demo "instantly and at will" using Reprise, without needing SEs to join every early prospect conversation. They can also be much more adaptive when speaking with customers, showing aspects of the product they'll care about most based on the real-time feedback they receive. This real-time feedback helps to qualify whether the solution is relevant earlier in cycles, improving sales cycle efficiency.

Companies that start with live demos often repackage that work and tackle sales leave-behinds as their next demo program use case, as is the case at Digital River. From there, they mature their program further by building libraries of assets that can be customized, shared across teams, and added to the website as guided tours.

The long-term goal for most companies starting their demo program journey with live demos is to automate parts of the demo process that will help them scale while maintaining a high level of personalization. Finding the right balance of customization with scalability is key.

Starting Point C: The All-in Product Experience via Dedicated Demo or Sandbox Environment

For organizations that want or need the ability to deliver deeper demos offering a complete application experience, cloning the entire application in a dedicated demo or sandbox environment can be the preferred starting point. But maintaining these environments and their infrastructure gets very costly, very fast.

Demo creation platforms can alleviate these headaches by hosting end-to-end application clones in a secure environment. This approach frees sales engineering resources and equips both sellers and end users with a demo environment that works perfectly every time, without any of the maintenance headaches or anxiety of wondering whether the software might fail.

Companies that begin their demo program with a dedicated demo or sandbox environment appreciate the cost and SE resource savings that can be achieved with [demo software](#). They identify use cases where less customized product experiences are possible, and expand their demo program to encompass support for live demos, leave-behinds, or product tours.

Databricks is one example. Their complex product had historically leaned heavily on proofs-of-concept (POCs), which required a significant presales investment in terms of human capital and time for every sales opportunity. In an effort to scale, they've implemented a demo program where customers can engage with live demos, product tours, workshops, leave-behinds, and custom demo environments all as alternative options to the POC. This has led to greater alignment across the team and shorter sales cycles.

Identify the most important use cases to your team and the one(s) where you can make a quick win, and focus there first. Then, expand and prove it out again.

“Keep the customer journey in mind. It’s more important than the tool you’re using.”

ASHITA SALUJA

Senior Director of Field Engineering
Strategy & Scale, Databricks

How to Build a Demo Program Based on Your Stage of Presales Maturity

Another approach to building a demo program is to take a look at your team's stage of maturity. Some presales teams are at an early stage of maturity, are reactive to client demands, and may not have the processes they need in place. Others are highly optimized, and are positioned within their organization as a strategic partner in driving sales strategy.

Regardless of where you're at, it's possible to get started with a demo program to advance your maturity level. A demo program will show the value of [presales](#) by equipping your organization with the tools they need to successfully demo your product and close more deals.

Let's explore how you can get started with (or advance) a demo program at each stage of maturity, as defined by the [PreSales Collective](#).

Maturity Stage 1: Chaos

The PreSales Collective defines the "Chaos" stage of maturity as heavily manual, inconsistent, and highly adaptable. These teams may not have the processes or tools in place to support tasks. Efforts may be sporadic and uncoordinated, and the team's isolation makes it difficult to collaborate cross-functionally. As a result, they have limited influence on sales strategy, and tend to respond to client inquiries as they arise (without a structured approach).

This stage of maturity is all too common among presales teams, who are tasked with supporting sales staff and technical client inquiries, but do not have the adequate tools and/or processes to keep up with demand. Starting a demo program at this stage of maturity will make a dramatic difference in the day-to-day lives of your SEs.

What to do with your demo program:

Make the case for a demo program by keeping track of the amount of time your SEs spend building demos from scratch, or maintaining your demo environment. Calculate the costs of these hours. If your SEs were able to spend less time on repetitive or administrative tasks related to your demos, would they be able to speak with more prospects, and in turn close more deals? You have the beginnings of a great case to investigate a [demo creation platform](#) that can help your team scale the creation of demos via reusable templates and demo libraries.

Measuring success:

You've successfully made the case for a [demo creation platform](#), and/or have identified an initial set of demo assets that can be repurposed and templated for a larger program.

Maturity Stage 2: Defined

The PreSales Collective says that in the “Defined” stage “tools, documentation, and processes are starting to be defined,” but with inconsistencies. Team members are beginning to collaborate more frequently, with some defined roles and responsibilities, yet their influence on sales strategy is still limited.

What to do with your demo program:

At this stage, presales teams are starting to be called upon for their expertise and product knowledge within their clients’ specific scenarios and environments. This is a great stage to align key stakeholders who need to present your **product story** to prospects — that might include members of the presales, sales, marketing, and product teams. This alignment phase should focus on not only the role of demos at each phase of engagement; it should also include key messages you’d like to convey and the core audiences you’re trying to reach.

Measuring success:

You’ve understood the priorities of each stakeholder group, and have mapped out the key messages you’d like to use in demos for each of your core audiences.

Maturity Stage 3: Progressive

At this phase in maturity, tools, metrics, and processes are widely adopted, yet onboarding and training is inconsistent. In this stage, presales is seen as an integral part of the sales process, with end-to-end support throughout the sales cycle. However, the product story may still have some inconsistencies, which may result in less-than-optimal sales outcomes and inefficiencies.

What to do with your demo program:

At this stage, take your demo program to the next level by organizing demo libraries. A library of templated demos for different audience segments will set your team up for success. You can organize your demo library according to industry verticals, customer pain points, **sales plays**, or however your team may find the most value from them. These demo templates are also terrific enablement tools, ensuring that every sales and marketing team member is using the correct messaging to convey product value to prospects. Demo templates can be customized based on the prospect’s unique requirements.

Measuring success:

You’ve created and shared initial demo templates for each of your stakeholder groups, and have organized them in a folder or file system based on what makes most sense for your business.

Maturity Stage 4: Mature

Mature presales teams may find that their processes are becoming streamlined. They have tools in place for efficiency, and have established consistent training. These teams have seamless, well-defined processes, and are considered as subject matter experts who can provide tailored solutions to meet client demands. Considering the highly mature presales team's grasp on product story, they can begin to drive strategic value for the product and sales team, and increase their influence in the organization.

What to do with your demo program:

At this stage, you likely may be seeking broader adoption of demos throughout your organization. Formalizing your demo program and scaling it to meet the needs of more functions within the organization is a great step to take to increase the presales team's influence. If you haven't begun doing so already, measure the success of specific demos. For example, ask yourself, how well do certain demos perform in terms of close rates? Which team members do best with certain demos? How do demos work within your self-service marketing motion, and how can they be optimized or improved? From there, take action on improving your demos, and enabling team members to be more successful with them.

Measuring success:

You understand which demos work best for your core audiences, and can start to improve or phase out the demo assets that aren't converting for your team.

Maturity Stage 5: Optimized

In this stage of presales maturity, your team is operating like a well oiled machine. There's alignment between various cross-functional stakeholders who need presales' support, and the team is highly efficient. The presales function is seen as a primary driver of sales growth, and has a seat at the leadership table in determining sales strategy.

What to do with your demo program:

At this point, your team is likely embracing demo automation, and may have a full-scale demo program already in place across multiple departments or use cases. However, consider how your demo program can drive even more strategic value for your organization. As you increase the adoption of demos throughout the enterprise, governance and **security** becomes a major priority. Using the right demo creation tools can help establish these security and governance foundations, making it easier to track role-based access control and keep privacy and anonymization in check.

Demo optimization should also be taking place regularly, with continuous improvement processes in place based on presenter and prospect feedback. As products or features get updated, your demo assets should be updated accordingly. For self-service demos used in marketing materials and with buying committees, demo analytics can reveal how to optimize based on what prospects care most about. They can even inform the next best action for deals that may have stalled, giving your sales team a valid reason to reach out with a highly relevant message.

Measuring success:

You have established a successful governance system, and are able to make the case to IT or security teams that you're following the proper security and compliance protocols. You've also created a system for collecting feedback, reviewing **demo analytics**, and continuously improving your demos to drive more effective sales and marketing outcomes. You can measure an increase in organization-wide adoption of your demo program, or more use of demos across different teams.

At any stage of maturity, a demo program can elevate the strategic importance of your presales team, helping you evolve from a reactive, on-demand function to one that's proactive and central to leadership team's decision making process. The goal is to unlock more capacity for the presales team, while revealing new ways for demo stakeholders to convey the right product story to the right prospect, at the right time.

Presales Leaders: Here's How to Gain Credibility with the Executive Team

Is your presales team constantly in reactive mode, racing to keep up with ad-hoc requests from sales reps and clients? If this sounds familiar, you may feel like your team isn't collaborating well across functions. It might even seem as if you have limited influence on strategy or sales outcomes. As we've demonstrated in this eBook, a demo program can elevate your team's position from transactional to proactive and strategic, gaining credibility with the executive team in the process.

Presales can own a demo program from end-to-end — with a mission to drive better conversations with prospects and close more deals through scalable, repeatable demo storytelling. Many teams in your organization likely use demos (or could be using demos more effectively). These teams include marketing, product marketing, sales, and more. By establishing a demo program, presales can extend the strategic use of product experiences across the organization — driving better sales and marketing outcomes in the process.

Key takeaway 1: Setting up your demo program

Like any strategic priority, a demo program requires buy-in and participation from cross-functional stakeholders. The goal is to gather key stakeholders in the planning phase, and align on the best way to demonstrate value to your prospects via your product story. In the beginning, you'll want to nail down a set of capsule stories that can be used across teams. You'll also want to decide where and how demos will be used (for example, in a live sales demo setting, on your website, or as a leave-behind for committee decision-makers).

From there, it's time to start building your demo library. A demo creation platform can make this job much easier, helping you organize and scale content management and distribution. Think of your demo library like a Netflix menu of available options for stakeholders. You might choose to organize your demo library by sales play, prospect pain point, vertical, feature, or whatever makes most sense to your team. The goal is for demo stakeholders to have access to the customizable demos they need, on demand.

Key takeaway 2: Measuring progress and driving revenue with demos

The best part about a demo program is that it's measurable. You can gather demo presenter or user feedback, prospect feedback, and demo analytics to refine and focus your demos over time. Over time, you can track metrics such as which demos win the most opportunities in sales, or convert the most leads on your website for marketing. Demo analytics gathered through your demo creation platform can reveal how website visitors or buying committees are interacting with your demos.

You can report those success metrics to the executive team, and establish a continuous improvement process for your demos based on what drives the best sales and marketing results. This process helps elevate presales teams away from the ad-hoc service model and toward a strategic advisory role, where they can add most value with their technical expertise.

For presales, gaining a seat at the executive table starts with a little foresight and planning. A demo program can proactively establish presales as the keepers of the product narrative, while empowering other stakeholders to scale the use of demos across the organization. The goal is to reach even more prospects with the right product story at the right time, opening up more strategic capacity for SEs — and ultimately driving more revenue for the company.

Want to get started with a demo program?

Reach out to the experts at Reprise today [➤](#)

