HOW PRESALES CAN LEVEL UP WITH DEMO AUTOMATION

vivun.

Introduction

Before you read any further, stop and think about the last software demo you were given. What did you think was done well? What bothered you? What did you remember about it?

Customers spend as much as half their time in the buying process doing independent research, and a demo is often their first introduction to the product. As B2B technology companies continue evolving their go-to-market motions to become product-first and expert-led, the ability to quickly connect buyer needs with product capabilities with a great demo is only going to become more important.

However, a recent Gartner® report shows that teams struggle with their product demonstration strategy despite the heavy emphasis go-to-market teams place on demos. Research shows that at least 3 demos are required to close a deal, and that team members spend approximately 3.5 hours preparing for each demo—yet 30% of those demos are given to audiences who are poorly qualified.

Challenges with Demo Delivery

3
DEMOS OR MORE ARE REQUIRED TO CLOSE A DEAL

3.4
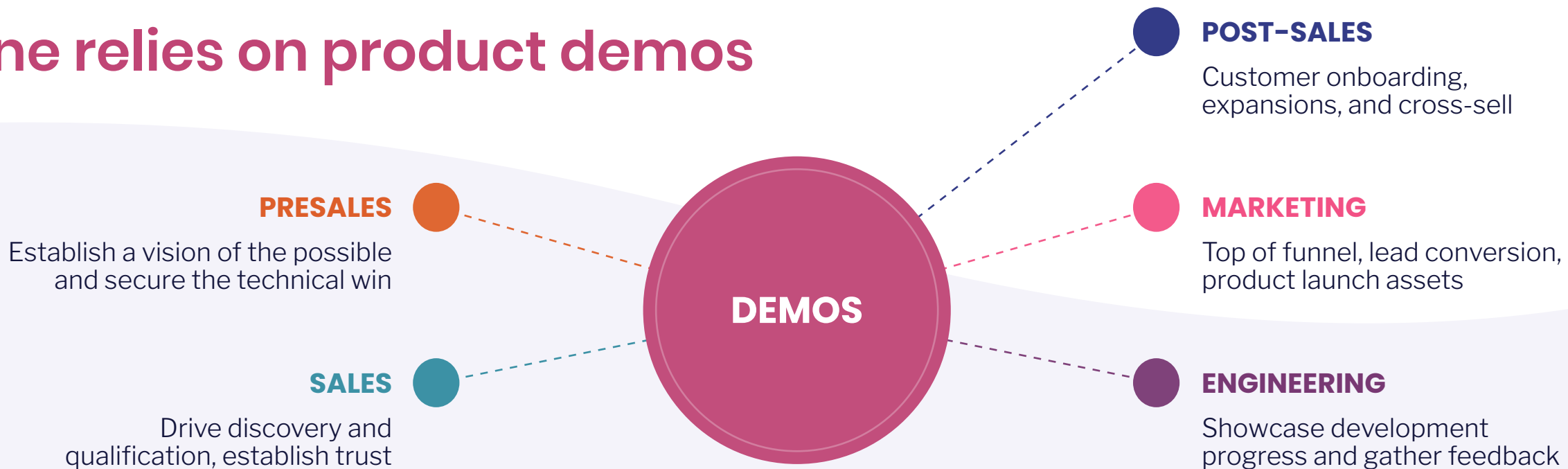### HOURS SPENT BY TEAM MEMBERS ON PREP PER DEMO

30%
OF DEMOS ARE POORLY QUALIFIED

Source: Gartner

Demo Automation solutions have emerged in order to help address these challenges—and the solution space has seen massive growth. According to G2, 60% of Demo Automation vendors currently operating were founded in 2020 and 2021, and the category has only grown in importance as companies look to reduce the length of their sales cycles and reach more customers without needing to grow headcount or overextend their current teams.

By providing the ability to quickly build, customize, and share demos, demo automation solutions can increase the capacity of the teams responsible for creating product demos, and eliminate the need for them to spend time showing the product to unqualified buyers.

Everyone relies on product demos

PRESALES
Establish a vision of the possible and secure the technical win

SALES
Drive discovery and qualification, establish trust

DEMOS

POST-SALES
Customer onboarding, expansions, and cross-sell

MARKETING
Top of funnel, lead conversion, product launch assets

ENGINEERING
Showcase development progress and gather feedback

Every team in a B2B technology company relies on product demos:

- PreSales has long been considered the group responsible for delivering demos to secure the technical win in the sales cycle.

- Product Marketing crafts product demos to illustrate newly launched features, serve as top of funnel content, and drive lead conversion from the website.

- For Sales, the ability to give a demo instead of holding the product at arm's length is critical to building credibility and establishing trust with buyers, and can be used to drive discovery and qualification.

- Post-sales, account management, and customer success teams can leverage demos to aid in customer onboarding, expansions, and cross-selling by showcasing product capabilities not currently in use by their accounts.

- Product and Engineering teams craft demos to show development progress to internal stakeholders and gather feedback from existing customers.

While the particular needs of each group vary somewhat, there's no single group with sole ownership of product demos, or a demo automation solution. In the vast majority of cases, it's mainly the PreSales team who is responsible for creating and sharing demos that the rest of the company puts to use. In other companies it might be the Product Marketing team, or mainly driven by Sales if the product doesn't require as much technical expertise to operate. Regardless, it's important to understand that product demos can be used in pursuit of many different organizational goals, and balancing those competing objectives can be difficult.

Demo Automation takes on many different forms

On top of the fact that demos are used by everyone in a modern B2B company, people have wildly differing views of what Demo Automation actually is—and product experiences can take on many different forms of media.

For some, Demo Automation is as simple as trying to scale the distribution of pre-recorded videos with a platform that enables users to easily share them with buyers and capture insights on key engagement metrics (views, completion rate, conversion) to understand what demos resonate most deeply with buyers.

Others want to build product tours where potential buyers can explore what the product looks and feels like without needing to spend time on a free trial of the software, or running a lengthy evaluation with the help of Sales and PreSales.

Sometimes, it just involves making the day-to-day responsibilities of a certain group more manageable, such as eliminating the need to manually set up and configure a demo environment for your software by offloading that to a vendor-managed application.

PreSales gains the most leverage from Demo Automation

While everyone in a B2B technology company benefits from the ability to quickly create and scale demos, PreSales stands to gain the most from the adoption of Demo Automation, while also generating the most lift for the rest of the company

Putting PreSales-created demos in the hands of sales reps and SDRs lets those groups build trust more quickly with buyers, and eliminates the need for sales engineers to be present during calls with unqualified customers.

PreSales is also asked to customize demos more frequently than any other group in the company, going beyond specific industries and product use cases to directly addressing individual stakeholders and customers on how a solution connects to their specific needs.

Making it easier for sales engineers to tell compelling and differentiated product stories translates to more time spent on solution architecture, POVs and pilots, technical objection handling, and other higher-value responsibilities.

The most effective medium for product demos…is all of them

If making demos as interactive and engaging as possible is the most effective way to win over buyers, then what is the most effective format for demos? Demos that engage buyers through a variety of different media will be more compelling than those limited to a single format (i.e. only video or captured screens).

This is because people rely on a variety of learning modalities—the sensory pathways through which human beings process information, and tend to prefer one or two of their senses (touch, sight, hearing, taste, and smell) over the rest when it comes to retaining newly presented concepts.

Learning Preference		Demo Examples
Visual	Prefers the use of visual aids, strong preference for seeing while learning	Tooltips and visual aids
Auditory	Prefers audible material, listening, and discussions	Narration and spoken explanations
Tactile	Prefers to learn by touch and doing	Simulated user interfaces, prompts to click on buttons and manipulate charts

Visual learners might prefer a product walkthrough where tooltips and visual aids guide them through a screenshot of the product, while auditory learners might prefer to watch a video so that they can listen to a verbal explanation. Tactile learners might benefit more from being able to click through a user interface, rather than simply looking at a screenshot of your application.

Even more importantly, buyers have all kinds of preferences when it comes to the type of media used to deliver demos, and while video may not necessarily be more or less effective than a live demo or clone of your application's frontend, choosing the right format to communicate specific kinds of information can go a long way towards winning buyers over.

A well edited video might let you deliver a concise overview of your product in exactly the company's brand voice, or directly address viewers on more detailed topics like implementation and onboarding when asking them to click through steps or read pages of documentation might be too burdensome.

Capturing screens of your application and embedding clickable links inside of them can provide a level of interactivity that tactile learners desire, and break up the monotony that can often result from needing to watch a series of consecutive demo videos. Buyers might be curious about technical details and request longform written content that they can peruse on their own time, or share with key stakeholders in IT, Security, and Ops.

Regardless of format, buyers want to get hands-on with products on their time and terms, and not be forced down a narrow path when it comes to demos—communicating relevant information to your buyers via multiple forms of media is the most effective way to give product demonstrations.

The Digital (Pre)Sales Room

WHAT ABOUT THE DIGITAL SALES ROOM?

Sales enablement and content management platforms have popularized the concept of the Digital Sales Room (DSR) as a microsite with multiple pieces of content relevant to buyers as they evaluate a solution. Because modern buying journeys don't follow a perfectly straight line from initial interest to purchase, being able to track how your buyer engages with what you've presented and then tailor follow-up efforts accordingly can be a powerful tool for the sales team.

That said, Sales may not always have the technical knowledge required to understand how product features and capabilities connect to customer needs. As a result, Digital Sales Rooms tend to rely heavily on sales collateral that may not be relevant when buyers are conducting technical validation.
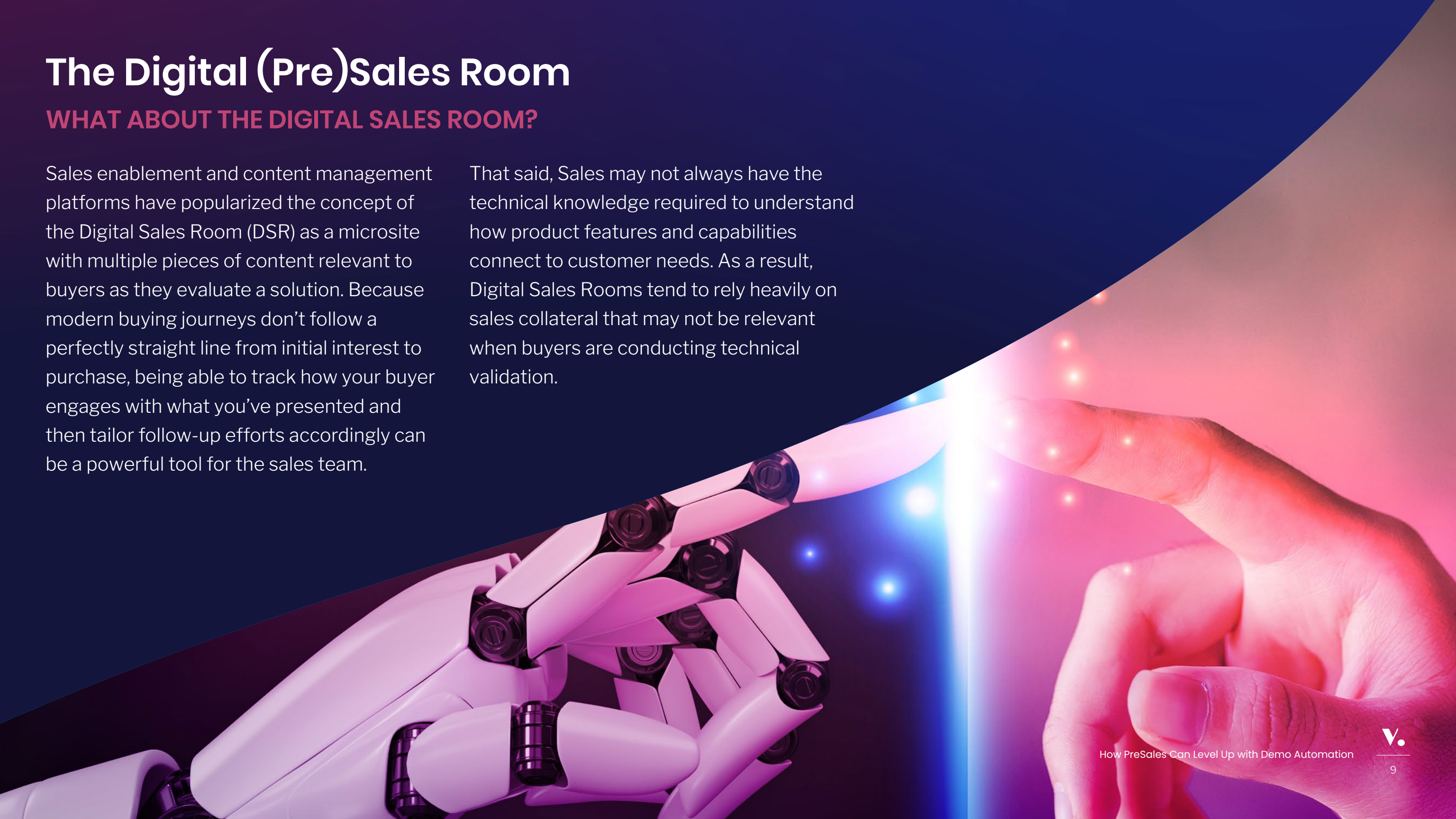
Illustrative Modern Buyer's Journey
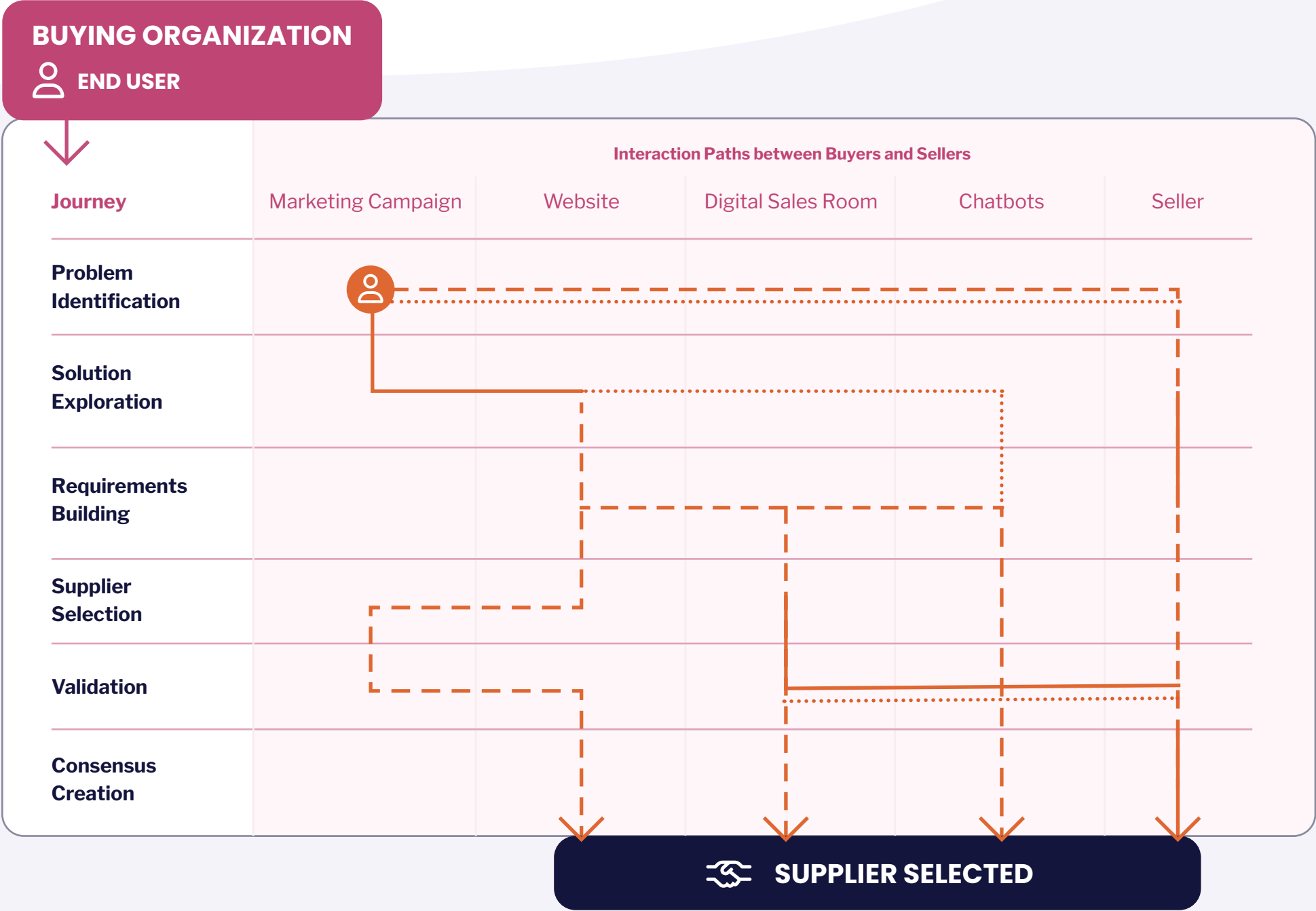
PreSales could provide their buyers not just with resources for the commercial aspects of the deal, but also a rundown of technical requirements, personalized demos to help a project team familiarize themselves with the solution, a video walkthrough of implementation steps, documentation on key product integrations, answers to questions from IT and Security, and relevant customer stories—all delivered in a voice that speaks directly to the customer.

BUYING ORGANIZATION

END USER

Interaction Paths between Buyers and Sellers

Journey	Marketing Campaign	Website	Digital Sales Room	Chatbots	Seller
Problem Identification					
Solution Exploration					
Requirements Building					
Supplier Selection					
Validation					
Consensus Creation					

SUPPLIER SELECTED

— Primary Engagement

- - Secondary Engagement

···· Iterative/Repeated Engagement

Individual Starting Point

Key Digital Sales Room Challenges

Persistent Microsite

Personalization

Video Conferencing

Conversation Intelligence

Embedded Configure, Price and Quoting

Electronic Signature

Bi-directional Content Sharing

Collaboration

Conversations Transcripts

Contract Negotiation

Embedded Digital Commerce Platforms

Buyer Engagement Analytics

How PreSales can make the most of Demo Automation

PreSales teams can see incredible gains in efficiency with demo automation. The ability to quickly build and customize product experiences to a wide range of buyers while also eliminating unqualified demos means more time spent selling and coming up with solutions for customers.

But there's potential to go further by closely examining your company's product demonstration strategy. Insight into how buyers engage with your demos can help determine adjustments to positioning and messaging or sales process to increase win rates. Understanding which product features are well-received in demos and comparing that with usage metrics could highlight potential adoption friction, or areas of the product that the go-to-market team is less effective at proving the value of.

To truly serve the needs of the PreSales team, it's essential for the insights generated from demo automation to exist alongside data on active sales opportunities. PreSales, Sales, and Product could analyze the data from demo automation and PreSales management solutions together to drive more repeatable wins and build more customer-centric product roadmaps. Failing to do so would instead result in islands of insights, making it harder for all teams to get valuable information from the data, and more difficult for PreSales teams to prove their contributions to the rest of the organization.

Deliver amazing demos with VivunOne

What if you could not only build and deliver compelling demos at scale, but also enhance visibility into PreSales and provide actionable insights to the company on how to drive better outcomes?

With VivunOne, sales engineers have a single platform to scale PreSales, drive Product alignment, and deliver more demos, and AI-powered assistance in the form of SE Copilot and the Vivun Intelligence System, the industry's first-ever AI domain model for PreSales.

PreSales can pull up an opportunity being tracked in Vivun and see suggestions on which demos to send over based on next steps, key competitors, and the buyer's technical requirements, then use insights on how they've engaged to further refine their company's sales and product strategy.

Rather than burden the PreSales with additional work, Vivun easily captures PreSales data, makes informed recommendations, and amplifies the collective intelligence of the team.
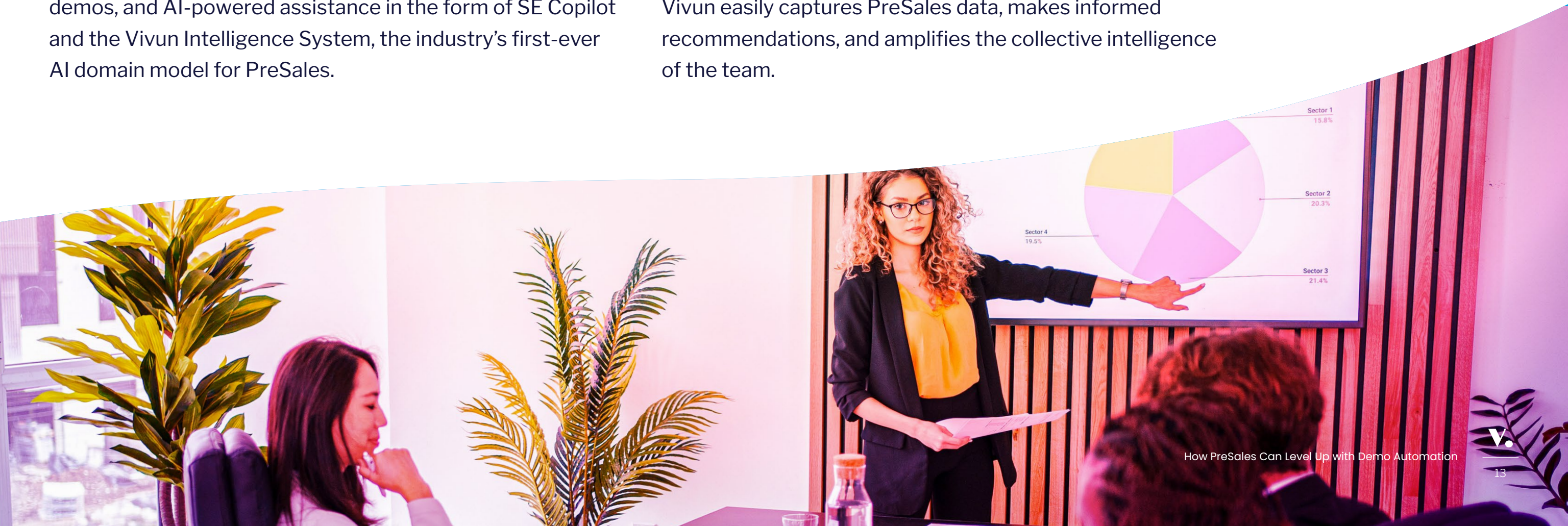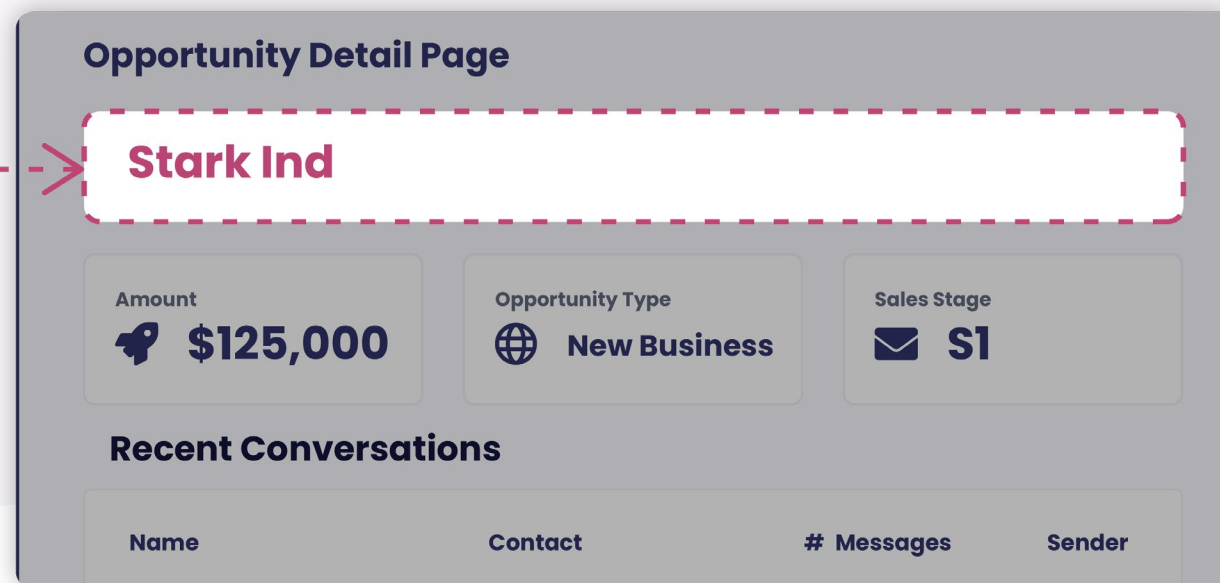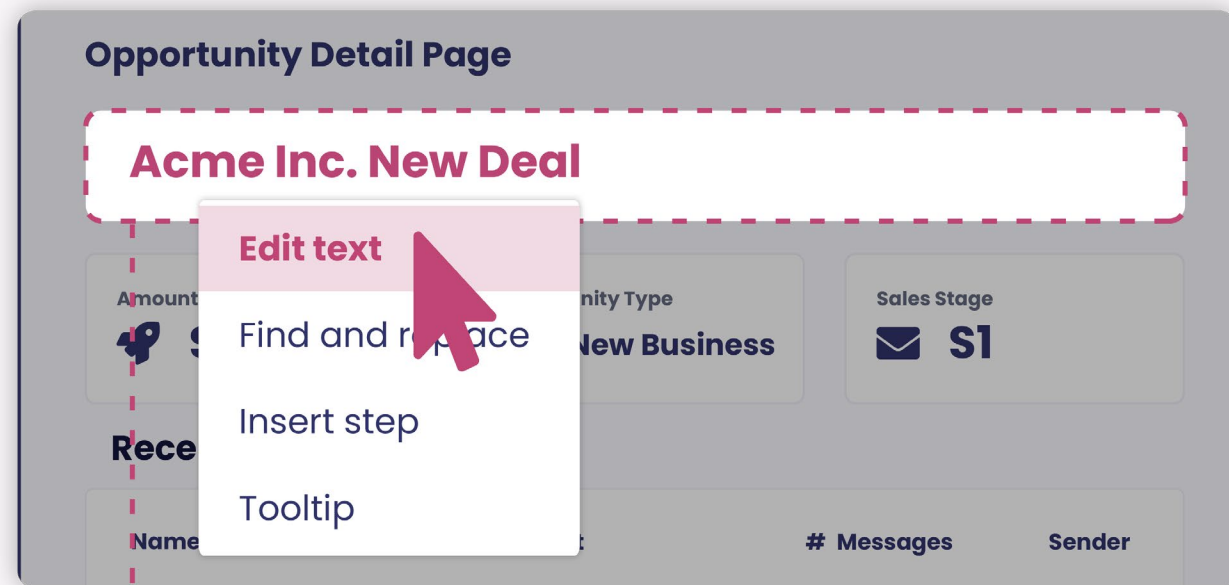
How Vivun levels up PreSales with Demo Automation

PRODUCT CAPTURE

Free up time for more impactful PreSales activities by taking demo creation from hours to minutes. Seamlessly capture screens from your application to start building demos.

vivun.
You are capturing screens for **Contactial Guide**

Opportunity Detail Page

Acme Inc. New Deal

Amount	Opportunity Type	Sales Stage
🚀 $125,000	🌐 New Business	✉ S1

Recent Conversations

Name	Contact	# Messages	Sender

Account Details

Name		# Employees	Licenses
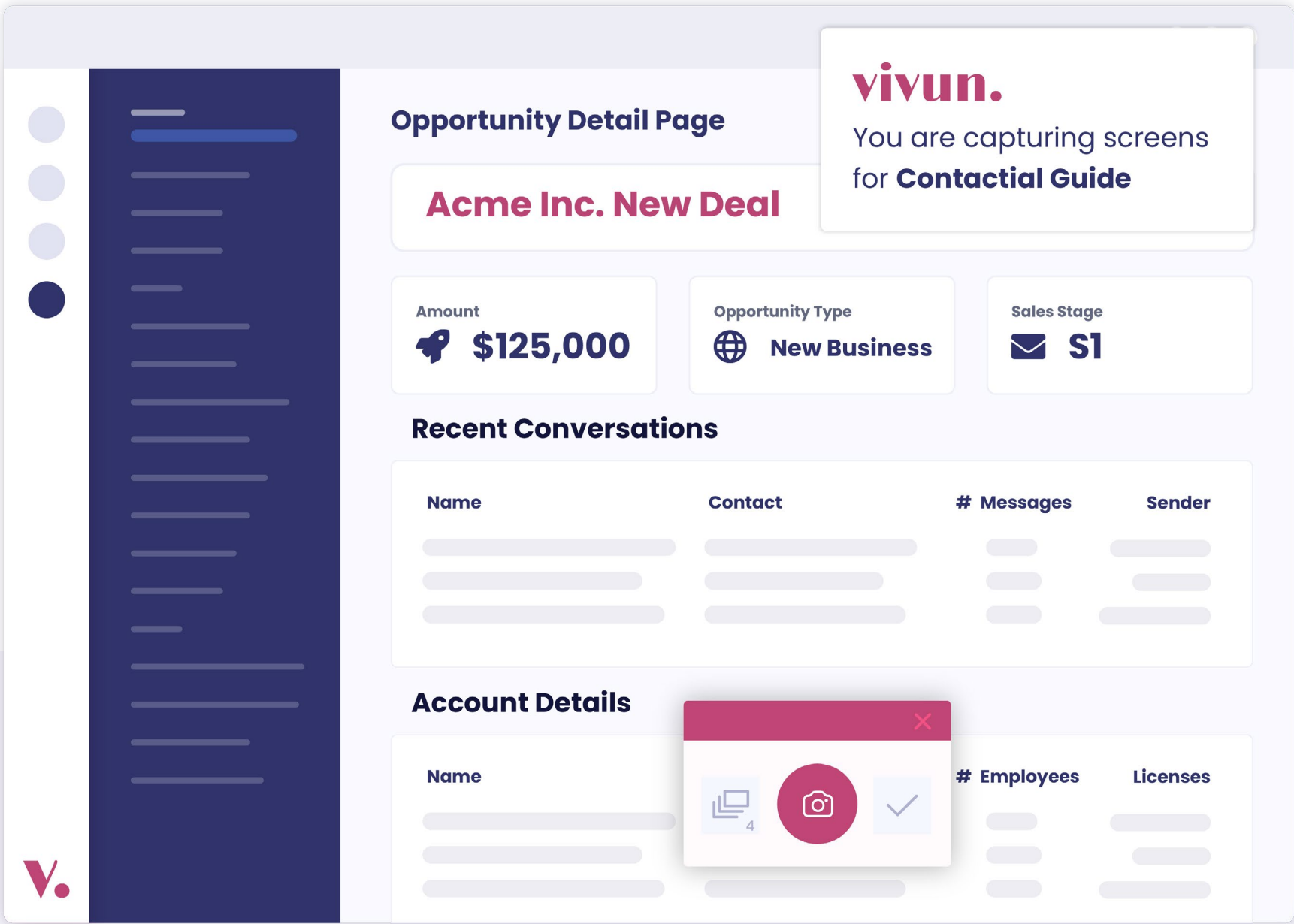
DEMO BUILDING

Create highly interactive demos, quickly tailor them to buyers, and leave a lasting impression. Customize text on captured screens, add tooltips, and embed images and videos.

DEMO COLLABORATION

Scale demo creation instead of always needing to start from scratch. Quickly share demos with your entire organization and use existing work as a base for more tailored product experiences.
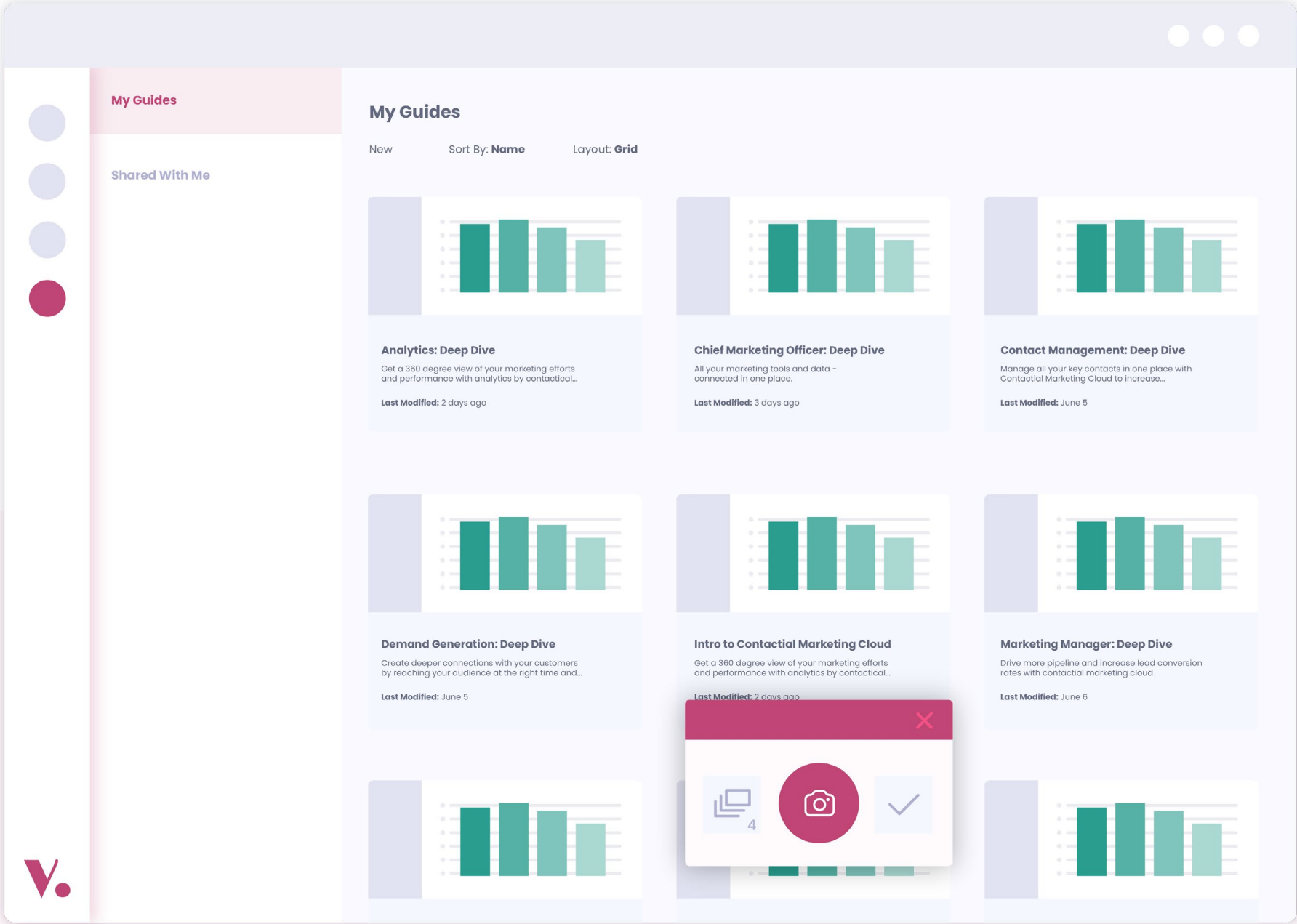
Contactial Onboarding: A General Guide to Managing Your Accounts

Created April 6, 2023   **Last modified** 3 days ago

Total Guide Views	Total Unique Guide Viewers	Average Guide View Duration
🖥 **12,227**	👤 **5,127**	⏱ **27m**

Guide Views

Viewer ID	Step/View	Completion Rate	Duration	End Time
Brett Crane	12	98%	1h 32m	March 30, 2023, 4:55pm
Clay Killgore	13	99%	2h 12m	March 2=, 2023, 4:35pm
Brett Crane	5	2%	58s	March 27, 2023, 2:35pm
Anonymous 00001	2	54%	32m	March 25, 2023, 8:03am
Anonymous 23575	11	98%	56m	March 30, 2023, 11:06pm

DEMO INSIGHTS

Clearly see how your buyers engage and identify winning demos. Track key engagement metrics for each of your demos and scale winning talk tracks across the team.

PERSONALIZED DEMOS AT SCALE

With VivunOne, PreSales needs less time and effort to complete the top PreSales activity – delivering compelling demos. Make it easier to showcase your highest-value use cases, support demand generation efforts, and guide the sales process with insights on engagement.

About Vivun

PreSales teams are essential to delivering the experience today's technology buyers demand. Providing Solutions leaders with the AI-powered ability to automate routine tasks and turn data into actionable insights lets them manage teams more effectively, align sales with product, and find ways to turn deal wins into repeatable best practices.

Vivun is the leading provider of PreSales software. Its AI-powered platform supports a family of products that enable B2B businesses to accelerate sales and drive revenue more efficiently. With PreSales at the forefront of the modern go-to-market, organizations can manage their solutions teams globally, provide immediate access to products that fit, and scale their demo abilities without more headcount. The world's leading companies power their go-to-market motions with Vivun.

vivun.