



BEST PRACTICES:

# How to Evaluate Software Demonstrations

# Get Organized to Stay in Control

Reviewing demonstrations is perhaps the most critical component of the software selection process. This is where you see the systems in action and learn what they can really do for you.

However, you are at a critical stage in your software selection - moving from online research to active engagement with software vendors. This requires a new level of organization and commitment to the software selection process. To make the most of these demonstrations, we suggest you adopt the following best practices for demo evaluation.

First, keep your process manageable by evaluating five or fewer software systems. Beyond five, you won't be able to drill down deep enough into each product. By now, you should have a "short list" of five or fewer products.

## GETTING ORGANIZED

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- Evaluate five or fewer systems
- Set a date for each demo
- Get the right people involved
- Know your key requirements
- Stay in control of the process

## Getting Organized (Continued...)

Second, for each software vendor, set a date and time to demo their software. Don't try to demo the system the first time the software salesperson calls; you'd quickly burn out. Schedule the demos a few days or even a week or two out so that you have time to prepare.

Third, get the right people from your organization involved. It's important to have co-workers from different parts of the organization involved to assess the software modules that they will use on a daily basis. The demo is also a great

**“ For each software vendor, set a date and time to demo their software. ”**

opportunity to get “buy-in” from all parts of the organization.

Next, be sure you head into these demonstrations knowing your key requirements. Build a list of your key requirements, and then ask the sales people to demonstrate those capabilities. Otherwise, you might end up watching sales people show off cool features that have nothing to do with your requirements.

If you get organized and drive the process, your demo evaluation will be far more effective.

# Educate Vendors on Your Needs & Process

The best sales people are focused on helping their prospects and customers solve business challenges. Help these people do their jobs by educating them on your software needs and selection process.

The more the software vendors know about your needs, the better they can communicate how their software can help. For example, if you highlight which functional capabilities are most important to your organization, the software vendors can spend more time demonstrating those capabilities in their software.

Meanwhile, educating the sales reps on your selection process will help them be more responsive. If they know what you need and when you need it, they are in a better position to deliver on-time and in-full.

## TELL THE SALES REPS

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- How they will be evaluated
- Your most critical requirements
- Who they're competing against
- Your timing and process
- What you want from the demo

# Prepare Demonstration Scripts for the Vendors

Software buyers miss a HUGE opportunity by letting the software salesperson dictate the flow of the demo. They should demonstrate how the software meets *your* needs, not just show their product in its best light.

The easiest way to take control of the demo process is to draft detailed demo scripts for the vendors ahead of time. Start by identifying the five most important processes that the software will automate (you can send more later for a second demo). Then draft a brief description of each process and send it to each vendor so they can show how their software automates each process. Now compare how each system did on each process.

Keep an open mind: vendors may have innovative ways to automate your processes.

## EXAMPLE DEMO SCRIPT

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### **Accounts Receivable Script:**

Please demonstrate the accounts receivable (AR) module. In particular, please demo:

1. An AR ledger of all outstanding accounts with aging statistics for 30, 60, 90 and 120 days.
2. Use the report to prioritize engagement with outstanding accounts.
3. Mail merge collection letters with different versions based on age of receivable.
4. Apply a partial payment to a specific invoice and one payment to multiple invoices.
5. Track account interactions for all activities related to collections.

# Focus on Ease-of-Use During the Demonstration

At Software Advice, the most common question we hear from software buyers is, “Which software is the easiest to use?” That makes sense, since your success with a new software system is dependent on your ability to quickly get up-to-speed and start using the system.

The demonstration is your best chance to answer that question for yourself. However, there is a real science to usability. You’ll want to consider the five ease-of-use criteria we list at right.

As you watch the demos, keep track of how many screens are navigated to accomplish a specific process. The fewer clicks and screens, the better. Again, keep an open mind about new ways of doing things. Don’t expect your new software to look and act just like your existing system.

## EASE-OF-USE CRITERIA

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- Are important features accessible from anywhere without too many clicks?
- Do the field labels and other application content speak the language of your industry?
- Are colors and visuals easy on the eyes and provide visual clues for intuitive navigation?
- Do all screens share a common organization and styles to create familiarity for users?
- Is contextually appropriate help available at important decision points?

# Keep Track of the Results with a Demo Scorecard

It's important to use a scorecard to keep track of each demonstration. That way you can remember what you liked and disliked, and then compare all the systems side-by-side when your demos are complete. You can build a table similar to what we illustrate below. Many people use Microsoft Excel for this.

	<b>Vendor A</b>	<b>Vendor B</b>	<b>Vendor C</b>	<b>Vendor D</b>	<b>Vendor E</b>
Accounts receivable	<b>5</b>	<b>5</b>	<b>4</b>	<b>4</b>	<b>3</b>
Requirement 2	<b>4</b>	<b>5</b>	<b>4</b>	<b>5</b>	<b>3</b>
Requirement 3	<b>5</b>	<b>3</b>	<b>3</b>	<b>2</b>	<b>3</b>
Requirement 4	<b>2</b>	<b>2</b>	<b>2</b>	<b>3</b>	<b>1</b>
Requirement 5	<b>4</b>	<b>3</b>	<b>2</b>	<b>1</b>	<b>2</b>

# Summary

If you evaluate your upcoming software demonstrations using the five best practices we just shared, you'll be ahead of 99% of software buyers.

Too often, buyers let the software sales person drive the demo process, they fail to prepare for the demos and they don't support the salesperson with the information he/she needs to do their job right.

Get organized before your demonstrations and you'll avoid costly software selection mistakes.

## BEST PRACTICES FOR DEMOS

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- Get organized and stay in control
- Educate vendors on your needs and process
- Prepare demonstration scripts for the vendors
- Focus on ease-of-use during the demonstrations
- Keep track of the results with a demo scorecard