How to Get the Most Out of Demos

What you learn during the demo session will probably be the most important inputs to your overall vendor evaluation scoring. You could simply sit back and let the platform provider to take you through their usual pitch but, if you focus on a few of the following things, you can get the most out of your session.

Setup

Make sure you schedule ample time to go through the demo. If this is just a preliminary session, you may be able to get an overview but, generally, you will want at least an hour when you are doing your deep dive. Because you will only be doing demos with your short list of platform candidates, do not feel that you might be wasting a provider's time – the demo is their best chance to sell to you.

When it comes to scheduling, bring your team. You may not be able to invite everyone, but you definitely want to get input from the actual people who will be using the platform on a daily basis. If you have technology leads, bring them too as you may need their input or signoff later and they may find showstoppers about the rest of your technology that would be best to be surfaced now.

On the vendor side, it's a good idea to find out who will be attending to make sure they will be able to ask all of the questions you have. So, for example, if you are a gaming company and will be paying special attention to mobile capabilities, you should let them know that so they can bring the appropriate people to the demo.


Agenda

Most enterprise-level social ad platforms may take hours to go through in detail so it's important to set a solid agenda to see the most you can in the shortest amount of time. Platform providers have done a million demos so they'll have their flow and script ready to go. A good seller will reach out to you beforehand to check in and make sure to tailor the session based on the things they know you will be interested in seeing.

The session should start with a quick round of intros if the teams haven't all met each other yet. The evaluation team needs to know about the provider speakers so they can put into context the information they will be receiving. The same applies to your team as well. When one of your team asks a question, it will help provide the platform team the context they need to craft a useful answer.

Q&A

Many demos are often derailed when someone from the evaluation team attempts to dive very deep into the platform in order to understand how his or her most important issue is being addressed by the solution. It's okay to interrupt the demo speaker and ask clarifying questions, but it's best to instruct your team to write down their deep questions during the session and ask them either at the end or at stopping points throughout.

Sometimes it's even best to set up another time to dive into these types of complex inquiries so that you can continue the demo. You should coach your team about on this issue beforehand but, if you notice that one person is monopolizing the conversation, break in and request that you move on so that the demo time can best serve everyone's needs.
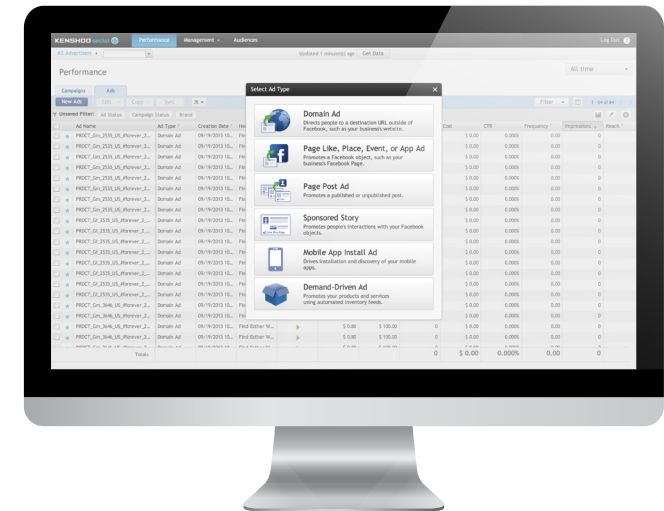
Test drive real scenarios

As you're taken through the demo, the best way to evaluate a social ad platform is to be taken through actual scenarios that are common to your team. For example, ask the vendor to take you through the campaign creation process for ad formats you typically use. Request to build a report on the fly so you can see how it works. This is the only way to really judge if a social ad platform will work for you.

Look for page and report load times. Ask about some of your current pet peeves at each step to see how the solution addresses them. Definitely try to push the envelope. The platform may work well for basic operations but it could have limitations that you can only discover using real scenarios.

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Show me – don't just tell me – your differentiators

At this point, you've heard their pitch and read their marketing materials. The demo is where you can see if the proof is in the pudding. Some solutions may oversell their capabilities and sound amazing but then fall short in reality. The demo is your time to test the bells and whistles the solution claims to be earthshattering – sometimes they will and sometimes they won't.

You will also want to use this time to double check that the key differentiators that have attracted you to this platform are actually in the platform. Some platform providers tout their features and benefits in their pitches but sometimes that functionality just doesn't make it to the UI. They may have back end processes and tools to be able to perform that function, which is fine, but it's good to know what's actually self-service in the UI before you make your final decision.

What's on the roadmap?

After you've seen the demo, it's a good idea to now talk through the roadmap as most of it will probably be improvements on the current platform versus brand new functionality. Some of these things may get surfaced throughout the demo but it's good to have a section just devoted to this so everyone on your team can get on the same page.

Although you should judge a platform just on its current capabilities, you should also take into account what might be launching in a few weeks or months. That might be the difference between choosing one platform over another. That being said, many marketers can get wrapped up in the pie-in-the-sky roadmap and end up scoring a platform a bit too high based on planned functionally that never gets added or is pushed back quarter after quarter.

Find more resources like this one in:
The Kenshoo Guide to Evaluating Social Advertising Technology Platforms

The Bottom Line: Make sure you know everything that's not in the base pricing and package

Technology platforms are generally modular in design so that clients who only require core functionalities can pay the lowest price. Some of the bells and whistles you see in the demo may actually have their own, separate pricing. Make sure to ask the demo provider before you start to identify any functionality that is not included in the base pricing.