

How to Make the Most of Your Next Tech Demo



In my free time, I sit on the board of a charity that means a great deal to me. And after 12 years, we found ourselves in a situation I talk about with advisors every day: We have outgrown our current system and processes. At this critical point in our operation, we're asking many of the same questions you are:

- Do we have the right leadership in place?
- Is our branding still relevant?
- Do we need to hire more employees?

But most importantly, we're evaluating whether it's time to leave spreadsheets and our homemade system behind and move to a third-party technology.

To answer our last question, we needed to find and research major providers of peer-to-peer fundraising technology and start attending demonstrations.

Now that I'm on the receiving end of technology demos, I've noticed that giving demos myself day in and day out has made me very good at attending them. It's also given me a brand new respect for advisors who are reviewing technology for their firms. It's not easy to make time to evaluate tech while still fulfilling day-to-day responsibilities. So I wanted to share a few ways you can prepare for demos in order to make the most out of them.

Before the Demo

Make a List

Here's what we know for sure: Outsourcing to a modern, third-party technology is going to be critical to the growth of our charity. It's also going to be highly

disruptive and take a lot of time and work to implement. Thinking ahead about what we're looking for in a new technology helps cut through the noise that can be distracting and inefficient during demos.

Make a list of the functionalities and workflows you need, and separate it into categories. I suggest the following:

- Absolutely Need
- Nice to Have
- Needs Improvement
- Can Live Without
- Not Necessary

As an aside, be cognizant of exactly what falls under "Not Necessary". It's possible that some features you don't consider necessities could actually be beneficial tools that boost efficiency or enhance your value. Do yourself a favor and at least take a look at these items.

Make sure you're prepared to share your list during the demo or, even better, send it ahead of time to the technology provider so they can tailor the demo environment and presentation to your firm.

If the provider has an online profile, fill it out! Doing so will only make the hour you spend in the demo more beneficial.

Go to Their Website

Do your due diligence: review the feature information on your potential tech provider's website. The company information and executive bios can wait. Go straight to the features information and compare what you find to your list. At minimum, they should check off all the "Absolutely Need" features you've selected. You should also look for tools you hadn't previously considered, and add them to their respective segments on your list.

Visit the Integrations page to make sure the new technology works well with third-party tools you're already using. Last, check the Resources page: Is their blog up to date? Do they offer free webinars and release notes? You don't have to comb through it all with a magnifying glass, but review it at a high level to see if the content inspires you.

By the way, I know what you're thinking: "How obvious, he's referencing the Orion website." Nope. The tech I've been evaluating can be found at <https://kindful.com/>. Their website does a great job hitting on all the points above.

Demo Day

Beginning of Demo

Be prepared to talk about your firm and your needs. A good demonstrator should ask for this up front, but most don't, so take the time to tell them. If not, it's likely they'll make assumptions about your firm, and the demo will not be as effective as it could have been.

Take the first few minutes to explain your firm, its structure, the types of clients you work with, and the functionality you expect to see.

Tech demos help you make critical decisions for your business — so come prepared to make the most of them. Click To TweetFinally, avoid vague requests. The one I hear most often is, "I want to see reporting." Well, what does "reporting" mean to you? Are you referring to client reporting, operational reporting, compliance reporting, business intelligence, or something else entirely? Being specific will ensure you see the functionality that's critical for running your unique business.

During the Demo

Please talk!

Trust me as someone who gives demonstrations all day: If I am the only one talking, it makes for a very boring demo. If I'm getting sick of hearing my own voice, you SURELY are!

So when you see or hear something of interest, ask to see it in greater detail. Think of a critical workflow or two: Think through each step, explain it, and have them show it. Make *sure* they show it! I cannot stress this enough. It's easy to say, "Yes, we can do that," and maybe they can. But what you're not seeing is the 347 steps it takes within the system. Make sure you see and understand how the platform works, not just looks. If you're still unsure if the system can handle specific functionality, ask how other users do it and if you can speak with them.

It's important to be extremely open to change, especially if you built your own system. The third-party system you're evaluating wasn't built for your firm specifically, so think about those items you marked as "Nice to Have" or "Can Live Without" and envision how some of your workflows would work in the new system. The process may be different, but that doesn't make it wrong.

In most cases, these demos will give you an opportunity to consider approaching your workflows in ways you've never thought about before. Take advantage of this — seriously. Be open to change and adopting new best practices.

Beyond the First Demo

Don't worry about getting through everything on your list during the first demo; in fact, this should really just be an overview.

Be prepared to schedule at least two more calls to allow you to dive deeper into critical functionality. Ideally, users from your firm who will be performing the tasks in question will be present on these calls.

You may be faced with concerns from your team members that the technology you're evaluating will actually be replacing them. Remember, it's likely you're making this change to scale your firm, meaning there's opportunity for everyone to master the new technology and free up the capacity to grow.

One of the best suggestions I've ever heard for vetting a new system? Talk to other tech providers who integrate with them. If it's easy for third parties to work with them, chances are it will be easy for you, as well.

Finally, follow up with the technologies you didn't choose and let them know why. This feedback is extremely important — and not just to them. Given the pace at which technology companies evolve, many use this feedback to improve their offerings, which could benefit you one day. (This is also just downright polite. Don't be rude.)

These decisions are important. This change is going to completely redefine how we run our charity; the same thing goes for your business. It's critical to put in the necessary time to prepare for and attend demonstrations. The decision you make for your company now will directly affect what your company becomes.

Ready to put your new demo skills to the test? Contact us today for a closer look at the Orion features that make your “Absolutely Need” list.

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