

[Account Name] Pre-Demo Planning Sheet

Demo Objectives

1. We need to enable [next decision & buying behavior] to keep our deal on track.
2. If we see [evidence] by the end of the meeting, the conversation was successful.
3. We also need to ensure [key contact] feels [emotion] after, based on [context].

Current State / Negative Outcomes

Despite trying [failed solutions], they still can't reach [positive outcomes] because of [problem / root cause], which is costing them [negative outcomes].

Why Now?

[Executive] is pushing to reach [strategic priority], with a project labeled [internal language] to support this. Their goal is to have [required capabilities] in place by [compelling event].

Future State / Positive Outcomes

Customer's Metrics	Current Measures	Target by [Date]
Executive KPI #1	X	XX (+Y%)
Executive KPI #2	X	XX (+Y%)

Threats & Alternatives

If we lose this deal, and they don't invest in [our product], it will be because:

- e.g. Alternative #1 — buying [Competitor X], even though [our differentiator is...]
- e.g. Alternative #2 — CTO is exploring an in-house build project.
- e.g. Competing Priority — customer team may be re-focused on [X].

Meeting Attendees

Customer Contact	Key Objection: What do we need to address or resolve for them?
Name & Title	
Name & Title	
Name & Title	

Demo Roles & Goals

Agenda	Owner	Role
Intro + Objective	AE	
Framing + Context	AE + Champion	
Demo	Sales Engineer	
Discussion	AE + CRO + Champion	
Next Steps	AE	
Follow Up	AE + Champion	

Value Map:

Customer Problem	Root Causes	Negative Impact	Required Capabilities	Unique Differentiator	Desired Outcomes	Metrics
#1 Focus:	Frame root cause.	Recap current state.	Agree on approach.	Showcase 1 - 2 core features.	Visualize outcome.	Confirm value in convo.
#2 Focus:	Frame root cause.	Recap current state.	Agree on approach.	Showcase 1 - 2 core features.	Visualize outcome.	Confirm value in convo.
[Example] Slowing revenue growth is falling below plan.	We can't break into the enterprise segment.	Our average contract value stays in 5 figures, we struggle to win large logos with 6 & 7 figure deals.	Develop champions who can help navigate complex buying groups and long cycles.	[Feature] Collaborative process that builds greater sense of ownership and tests for commitment.	40% of net-new revenue in the next two years driven by 10% of our new accounts.	Growth Rate Average Contract Value
	Our close rate is too low, we only close 15 - 20% of our pipeline each quarter.	Scrambling to build more pipeline, overspending on top-funnel that doesn't convert, driving up CAC.	Build compelling business cases that sell value aligned with priorities, not just product.	[Feature] Messaging built with buyers, and using their own, internal language.	Close rates rose above 30% and spending on top-funnel slowed to get costs under control.	Close Rate CAC