Live Demo Guide

MarketingPlatform - Product Demonstration Walkthrough

Demo Duration: 15-20 minutes
Audience: Investors, prospects, partners
Goal: Show product value and ease of use

Pre-Demo Setup Checklist (30 Minutes Before)

Environment Preparation

- ☐
  Login to demo account (credentials saved in password manager)
- ☐
  Clear browser cache and cookies
- ☐
  Pre-populate demo data:
  - ☐
    1,000+ sample contacts imported
  - ☐
    3-5 contact groups created
  - ☐
    2-3 dynamic segments defined
  - ☐
    5-7 message templates ready
  - ☐
    2-3 campaigns (draft, scheduled, completed)
  - ☐
    1-2 active workflows

- ○ ☐
  Sample analytics data visible
- ☐
  Test all demo flows end-to-end
- ☐
  Prepare backup: Screen recordings for each feature
- ☐
  Close unnecessary browser tabs and applications

Technical Setup

- ☐
  Stable internet connection (test speed)
- ☐
  Backup internet (mobile hotspot ready)
- ☐
  Screen sharing software tested (Zoom, Teams, Google Meet)
- ☐
  Microphone and audio tested
- ☐
  Screen resolution set to 1920x1080
- ☐
  Disable notifications (Slack, email, OS)
- ☐
  Set "Do Not Disturb" mode
- ☐
  Have glass of water nearby

Materials Ready

- ☐
  FAQ.md open in separate window (for questions)
- ☐
  FEATURE_SUMMARY.md as PDF (for follow-up)
- ☐
  Pricing sheet ready to share
- ☐
  Customer testimonials/case studies ready

Demo Flow (15-20 Minutes)

Introduction (0:00-0:30)

What to Say:

> "Thank you for joining. I'm going to walk you through MarketingPlatform—our all-in-one SMS, MMS, and email marketing solution.
>
> I'll show you five key areas: contact management, campaign creation, workflow automation, analytics, and compliance. Feel free to ask questions anytime—I'm happy to pause and dig deeper into anything that interests you.
>
> Let's jump right in."

What to Show: Dashboard overview (30 seconds)

Demo Section 1: Contact Management (0:30-3:30)

Goal: Show how easy it is to manage and segment contacts

A. Contact Import (1 minute)

1. Click **"Contacts"** → **"Import"**
2. Select pre-prepared CSV file (100 contacts)
3. Show column mapping (automatic detection)
4. Click **"Import"** and show real-time progress
5. Show import summary (95 imported, 5 duplicates skipped)

What to Say:

> "Contact import is incredibly simple. Upload CSV or Excel, the system auto-detects columns, validates phone numbers and emails, and imports thousands of contacts in seconds. Here I'm importing 100 contacts—done in 5 seconds."

B. Dynamic Segmentation (2 minutes)

1. Click **"Create Segment"**
2. Build segment: "VIP Customers in California"
   - Rule 1: Tag = "VIP"
   - Rule 2: State = "California"
   - Operator: AND
3. Show real-time count (243 contacts match)
4. Save segment

What to Say:

> "*Now for segmentation. Let's create a segment for VIP customers in California. I'll add two rules—tag equals VIP, and state equals California. The platform instantly shows 243 matching contacts. These segments update in real-time as you add or update contacts.*"

C. Contact Detail View (30 seconds)

1. Click on a contact
2. Show timeline: messages sent, campaigns received, workflows entered
3. Show custom attributes and tags

What to Say:

> "*Clicking any contact shows their complete history—every message sent, every campaign they've received, every workflow they've entered. Plus unlimited custom attributes you can use for personalization.*"

Demo Section 2: Campaign Creation (3:30-7:00)

Goal: Demonstrate speed and ease of creating campaigns

A. SMS Campaign (3 minutes)

1. Click **"Campaigns"** → **"Create Campaign"**
2. Select **"SMS"** channel

3. Choose audience: "VIP California" segment (243 contacts)

4. Select template or create message:

   ◦ "Hi {{FirstName}}! Exclusive 25% off for our VIP members in {{State}}. Use code VIP25. Shop now: {{ShortURL}}"

5. Show character counter (145 characters = 1 SMS segment)

6. Add URL shortening for tracking

7. Schedule for tomorrow 10am PT

8. Preview message for 3 sample contacts

9. Save as draft

What to Say:

> *"Creating a campaign takes minutes. Choose SMS, select our VIP California segment—243 contacts. I'll use a template with personalization: Hi First Name, exclusive offer for our VIP members in State. Use code VIP25.*
>
> *See the character counter? 145 characters is one SMS segment. The platform automatically creates shortened trackable URLs.*
>
> *I'll schedule this for tomorrow at 10am Pacific Time. Before launching, I can preview how it looks for different contacts—here's John in San Francisco, here's Maria in Los Angeles. Perfect.*
>
> *From idea to scheduled campaign: under 3 minutes."*

B. A/B Testing Setup (30 seconds - if time allows)

1. Click **"Add Variant"**

2. Create Variant B with different message

3. Set test parameters: 20% audience, click rate metric

4. Show auto-winner deployment

What to Say:

> *"Quick A/B testing demo. Create a second variant, test on 20% of audience, the platform automatically sends the winning variant based on click rate to the remaining 80%."*

Demo Section 3: Workflow Automation (7:00-11:00)

Goal: Showcase visual workflow designer (key differentiator)

A. View Existing Workflow (1 minute)

1. Click **"Workflows"**
2. Open pre-built "Welcome Series" workflow
3. Show workflow canvas with multiple nodes
4. Explain flow: Email → Wait 24h → Condition (Opened?) → Branch to SMS or Email

What to Say:

> "*This is the visual workflow designer—our killer feature. This welcome series sends an email, waits 24 hours, checks if they opened it. If yes, send product recommendations via email. If no, send SMS reminder. All automated, no code required.*"

B. Build Simple Workflow (3 minutes)

1. Click **"Create Workflow"**
2. Name: "Abandoned Cart Recovery"
3. Set trigger: **"Shopping cart abandoned"** (webhook or Shopify integration)
4. Add node: **"Wait 2 hours"**
5. Add condition: **"Purchase completed?"**
6. Branch 1 (No): Send email with 10% discount
7. Branch 2 (Yes): Exit workflow
8. Add another wait: **"24 hours"**
9. Add node: **"Send SMS reminder"**
10. Set conversion goal: **"Track purchase within 7 days"**
11. Save and show activation

What to Say:

> "*Let me build a simple abandoned cart workflow from scratch.*

[Build while narrating]

Trigger: When someone abandons their cart. Wait 2 hours—give them time. Check if they completed the purchase. If no, send email with 10% discount. If yes, exit the workflow.

If they still haven't purchased, wait 24 hours, send SMS reminder.

Finally, set a conversion goal—track if they purchase within 7 days of entering the workflow.

Built in under 3 minutes. To do this in HubSpot requires their $3,200/month plan. We include it at $299/month."

Demo Section 4: Analytics & Reporting (11:00-13:30)

Goal: Show data-driven decision making capabilities

A. Campaign Analytics (1 minute)

1. Click **"Analytics"** → **"Campaigns"**
2. Select a completed campaign
3. Show metrics:
   - 5,000 sent
   - 4,875 delivered (97.5% delivery rate)
   - 2,437 opened (50% open rate)
   - 731 clicked (30% click rate)
   - 87 conversions (12% conversion rate)
   - $8,750 revenue
   - $37.50 spent on delivery
   - 233x ROI

What to Say:

> *"Analytics show complete campaign performance. This SMS campaign sent 5,000 messages, 97.5% delivered, 50% opened—excellent for SMS. 30% clicked, 87 converted, generating $8,750 in revenue.*
>
> *We spent $37.50 on message delivery. That's a 233x return on investment. This is the kind of ROI reporting that gets CMOs more budget."*

B. Dashboard Overview (1 minute)

1. Return to main dashboard
2. Show real-time metrics
3. Show channel comparison chart (SMS vs Email vs MMS performance)
4. Show top-performing campaigns

What to Say:

> *"The dashboard gives you everything at a glance: total contacts, campaigns running, messages sent today. Compare performance across channels—here we see SMS has higher open rates, email drives more revenue per conversion."*

C. Export Report (30 seconds - if time allows)

1. Click **"Export Report" → "PDF"**
2. Show generated PDF report for stakeholders

What to Say:

> *"Export polished PDF reports for your CEO or board. Everything they need to understand marketing ROI."*

Demo Section 5: Compliance Center (13:30-15:00)

Goal: Show automated compliance (critical for regulated industries)

A. Suppression List (1 minute)

1. Click **"Compliance"** → **"Suppression List"**
2. Show opted-out contacts
3. Demonstrate adding manual suppression
4. Show how system checks suppression before every send

What to Say:

> *"Compliance is built-in, not bolted-on. This suppression list contains every contact who opted out or bounced. When someone replies STOP to SMS or unsubscribes from email, they're automatically added across all channels.*
>
> *Before every campaign sends, the system checks this list. Zero chance of accidentally messaging someone who opted out."*

B. Consent Management (30 seconds)

1. Show consent logs
2. Show individual contact consent history (timestamps, IP addresses, sources)

What to Say:

> *"Every opt-in is logged with timestamp, IP address, and source. Essential for GDPR audits. You can prove exactly when and how someone consented to communications."*

C. GDPR Tools (30 seconds - if time allows)

1. Show data export feature
2. Show right-to-erasure one-click deletion

What to Say:

> *"GDPR compliance is one-click. A customer requests their data? Export it instantly. They want to be deleted? One click, permanent removal with audit trail."*

Demo Section 6: Integrations & Advanced Features (15:00-17:00 - Optional)

If time allows, show:

- **OAuth2 Login**: Google/Microsoft SSO for enterprise
- **Template Library**: Pre-built templates
- **URL Tracking**: Shortened links with click analytics
- **Shopify Integration**: E-commerce sync
- **API Documentation**: Swagger UI for developers

What to Say:

> "*Quick look at integrations. We support Shopify, WooCommerce, Stripe for e-commerce data. OAuth2 for enterprise SSO. Robust REST API with full documentation for custom integrations.*"

Closing & Q&A (17:00-20:00)

Recap (1 minute):

> "*To recap what we've seen:*
>
> - *Contact management with powerful segmentation—minutes to import, seconds to segment*
> - *Campaign creation in under 5 minutes with A/B testing and personalization*
> - *Visual workflow designer that competes with $5,000/month platforms*
> - *Real-time analytics with revenue attribution and ROI tracking*
> - *Automated compliance that protects your business and builds customer trust*
>
> *All of this for $99-$999/month depending on your needs.*
>
> *What questions do you have?*"

Common Questions (use FAQ.md for detailed answers):

1. **"How long does onboarding take?"**

   ◦ "Most customers launch their first campaign in under 30 minutes. We provide guided setup, video tutorials, and live chat support."

2. **"Can we migrate from [Competitor]?"**

   ◦ "Yes. We support CSV import from any platform, have migration templates for Mailchimp and HubSpot, and offer white-glove migration service for Enterprise customers."

3. **"What's the pricing?"**

   ◦ "Four tiers: Starter ($99/mo), Professional ($299/mo), Business ($599/mo), Enterprise ($999+/mo custom). Usage charges for messages beyond plan limits—$0.0075/SMS, $0.02/MMS, $0.0001/email."

4. **"Do you have a trial?"**

   ◦ "Yes, 14-day free trial with full feature access. No credit card required."

5. **"What about deliverability?"**

   ◦ "We maintain 97%+ delivery rates through partnerships with Twilio (SMS/MMS) and SendGrid (Email). Enterprise customers can use dedicated IPs and phone numbers."

Recovery Scenarios

If Demo Environment Breaks:

Option 1: Switch to pre-recorded screen capture

> "*Let me switch to a pre-recorded demo while we troubleshoot. This shows [feature]...*"

Option 2: Use slide deck

> "*I'll walk you through slides while we resolve the technical issue...*"

Option 3: Schedule follow-up

> *"I apologize for the technical difficulty. Let's schedule a follow-up demo where I can give you my full attention..."*

If Internet Connection Drops:

Have ready:

- Downloaded screen recordings of each demo section
- Slide deck with screenshots
- Mobile hotspot as backup internet

What to say:

> *"I'm experiencing connectivity issues. Let me switch to my backup connection... [or] I have pre-recorded demos I can show you..."*

If Questions Stump You:

Response:

> *"That's a great question. Let me make a note and get you a detailed answer from our [engineering/product/finance] team within 24 hours."*

Never: Make up answers or promise features that don't exist

Post-Demo Checklist

Immediate (Within 1 Hour):

- ☐
  Send thank-you email
- ☐
  Attach FEATURE_SUMMARY.md as PDF
- ☐
  Note all questions asked
- ☐

Schedule follow-up if requested

Short-Term (Within 24 Hours):

- ☐
  Answer any unanswered questions
- ☐
  Send demo recording (if permitted)
- ☐
  Provide pricing details
- ☐
  Share customer references if requested
- ☐
  Send trial signup link

Follow-Up (Within 1 Week):

- ☐
  Check-in: "Do you have additional questions?"
- ☐
  Offer technical deep dive for CTO/technical team
- ☐
  Provide financial projections for CFO
- ☐
  Schedule proof-of-concept or pilot discussion

Demo Tips for Success

Dos:

✅ Practice demo flow 3-5 times before live presentation
✅ Speak clearly and at moderate pace
✅ Pause for questions and reactions
✅ Show features relevant to audience's industry
✅ Use real-world examples and customer stories
✅ Demonstrate ROI and time savings

✅ Be enthusiastic but authentic
✅ Control the flow—don't get derailed

Don'ts:

❌ Rush through features without context
❌ Use jargon or technical terms without explanation
❌ Criticize competitors directly
❌ Make promises you can't keep
❌ Go over time (respect their schedule)
❌ Wing it—always have prepared environment
❌ Ignore questions or brush them off

Remember: The demo is about showing value, not every feature. Focus on benefits, not just functionality. Make it conversational, not a lecture.

Goal: Leave them thinking "This solves our problems and seems really easy to use."