

# Using Video For Sales

THE DO'S AND DON'TS OF AN EXCELLENT SALES DEMO





Gone are the days when sales teams were able to call up a customer and give them a demo purely on an audio platform. Web conferencing disrupted the landscape we were all familiar with. You were finally able to show your customers and prospects a live demo and provide them a visual without having to travel across the country. Today, video conferencing is the new normal, allowing you to demo from your mobile, desktop, or conference room. As more people become accustomed to joining video meetings, it is important to take advantage of that face time and put your best foot forward.

For sales teams, video conferencing can be a tool to help them achieve business goals. They want to close deals faster and meet their quotas. In order to achieve this, teams need more effective means of communicating with their customers and prospects. According to a recent HBR article, a face-to-face meeting can be 34 times more successful than an email, making a video sales demo a meaningful way to get in front of your prospects.

A sales demo is the perfect time to determine the challenges your prospect faces and provide them with a solution that will lead to positive business results. More importantly, if the sales demo is successful, the prospect will view this as a trusting partnership. Video conferencing can provide many of the benefits of a face-to-face meeting while also being flexible, cost saving, and scalable, but they can be tricky to master.

**We've gathered the do's and don'ts from our customers and internal Zoom and HubSpot sales teams to help provide you with a roadmap for delivering an excellent sales demo over video.**



# The Do's of an Excellent Sales Demo

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# The Do's of an Excellent Sales Demo

## Know Your Audience

Before we start talking demos, make sure you know who you're getting on a video call with. Whether this is someone you reached out to through prospecting, or someone who reached out to you, you'll want to make sure you **know as much as possible** about your upcoming caller. Some key pieces of information to get before your demo:

Which company do they work for? What do they do there?

What **buyer persona** might they fit into?

What does their business messaging look like?

Have they spoken to anyone at your company previously?

Which pages on your website have they visited?

Have they interacted with any content on your site, like a **webinar** or an e-book?

Have they previously used your product or service? Has anyone at their company?

Have they recently released a new product, feature, or service?

Which problems or issues might they be having?

Where do you see your product or service helping them, specifically?

Make sure to have all of this information in an easy-to-find place, whether that's in a handy notebook, a Google Doc, or **a CRM**.



## Get Face-to-Face with Customers and Prospects

It's true—video meetings are better than a traditional phone call or a videoless web meeting. When a prospect sees your face, they are more likely to empathize with you and listen to you. When you see their face, it's easier to gauge their reactions and interests. Don't just take our word for it, take a look at some of the research and feedback that has been collected over the last year.

A survey conducted of over 700 Zoom users found that video can improve trust between employees and help them feel more engaged at work. Eighty-two percent (82%) of users said there was greater trust with video, leading to more accountability and less multitasking, and 91% of users said there was greater engagement with video, leading to better understanding through nonverbal communication.

### When people turn on their video...

82% of respondents say there is a greater sense of trust

(86% in high-growth companies)

91% say there is greater engagement

(96% in high-growth companies)



According to a 2018 study conducted by Forbes Insights in partnership with Zoom, a survey of senior executives across verticals at companies with 500+ employees revealed that 73% of executives agree that video conferencing strengthens customer relationships. (81% among companies with higher than average growth). The study also found that 77% of executives think their company can improve the communication with external stakeholders (e.g. suppliers, customers, and business partners) via expanded use of video conferencing (83% among companies with higher than average growth). That's huge!

**“Video conferencing captures many of the benefits of face-to-face communication: Over three-quarters (78%) say video conferencing is much more effective than audio conferencing, and it also builds trust and engagement (72%) as well as improves team performance (71%).”**

In many cases, audio conferencing won't get deals won any longer. People want to jump on a video call to get a better understanding of your sales team, your company, and your product. Sharing your video allows prospects to see the human element in your business, and creates a personal connection that a simple audio call won't provide. You'll see greater engagement in your meetings and often times a faster sales cycle.

Getting comfortable on video, though, can be a bit tricky when starting out. Here are some tips to leave the nerves behind:

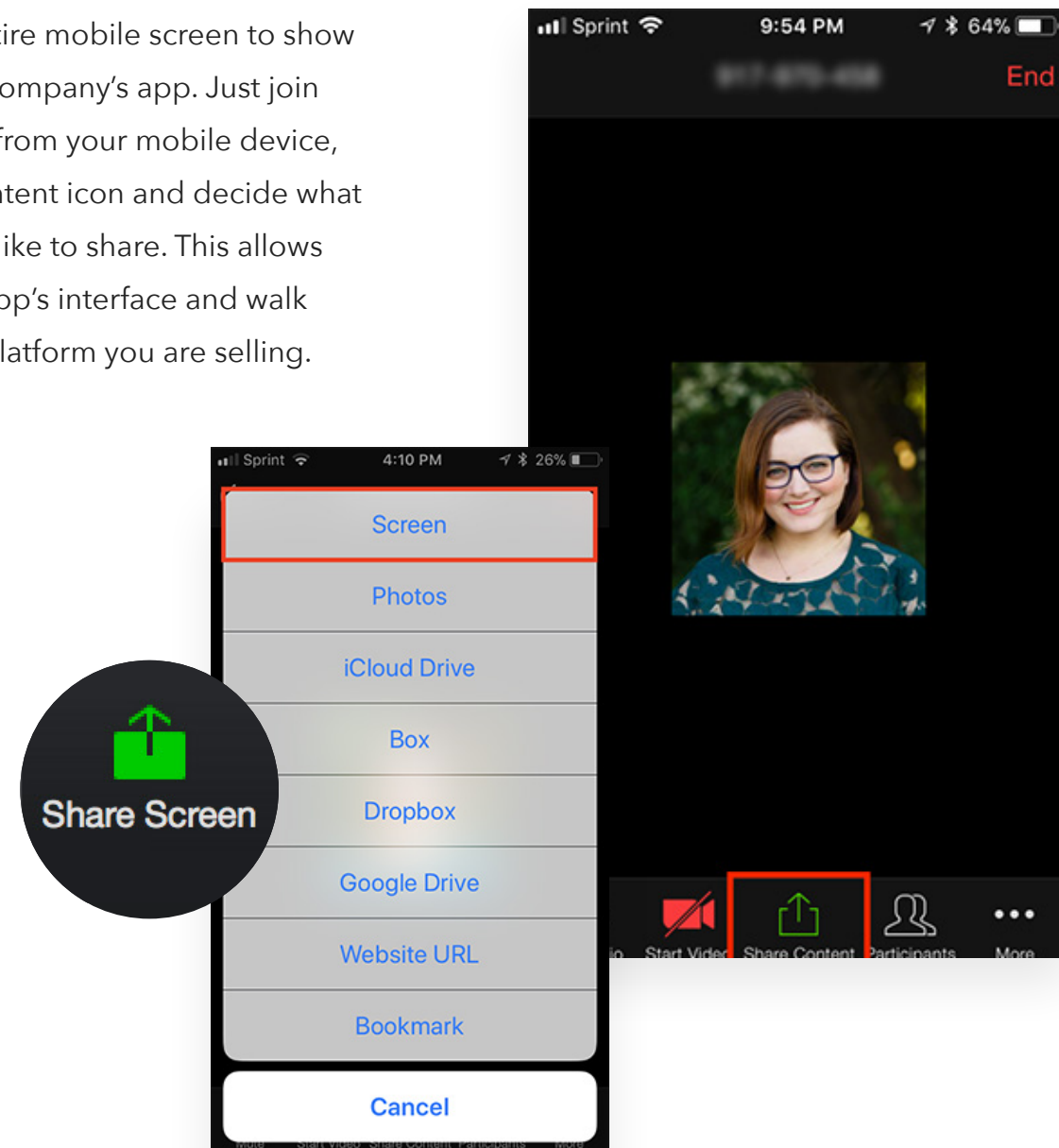
- ✓ Turn on your video with friends, family and colleagues to become comfortable when you're in front of customers and prospects.
- ✓ Raise your laptop to sit at eye level with you. If you don't have a desk that can get you there, stack some books under your laptop so you get the most flattering shot.
- ✓ Share something personal. Even if you're talking about the amount of snow outside or what you did over the weekend, sharing a small personal detail can make you feel a bit more comfortable on-screen.
- ✓ Bring some energy. On-camera energy often needs a little boost. Get excited about what you're talking to your prospect about—your high energy will get them riled up, too.
- ✓ Practice your demo with a friend or a teammate. Act as if your partner were a prospect, and get them to ask you some questions you may not expect. This will set you up for success, and get you ready to demo with some real live prospects.

## Screen Sharing

Screen sharing is not just for sharing PowerPoints anymore! If you're selling a software platform, walk the client through the interface. Designate specific applications, windows or area of your screen to share.

If you have the Zoom iOS or Android app, you can take sales calls from the road and even share your entire mobile screen to show the prospect your company's app. Just join the Zoom meeting from your mobile device, select the share content icon and decide what content you would like to share. This allows you to share your app's interface and walk them through the platform you are selling.

It is important to be specific and thoughtful about what features/functionality you should focus on. Your demo should be personalized to the problem the customer is trying to solve, and not all features are created equal. Customize the demo to address the customer's concerns and how your solution can help.



## Virtual Backgrounds

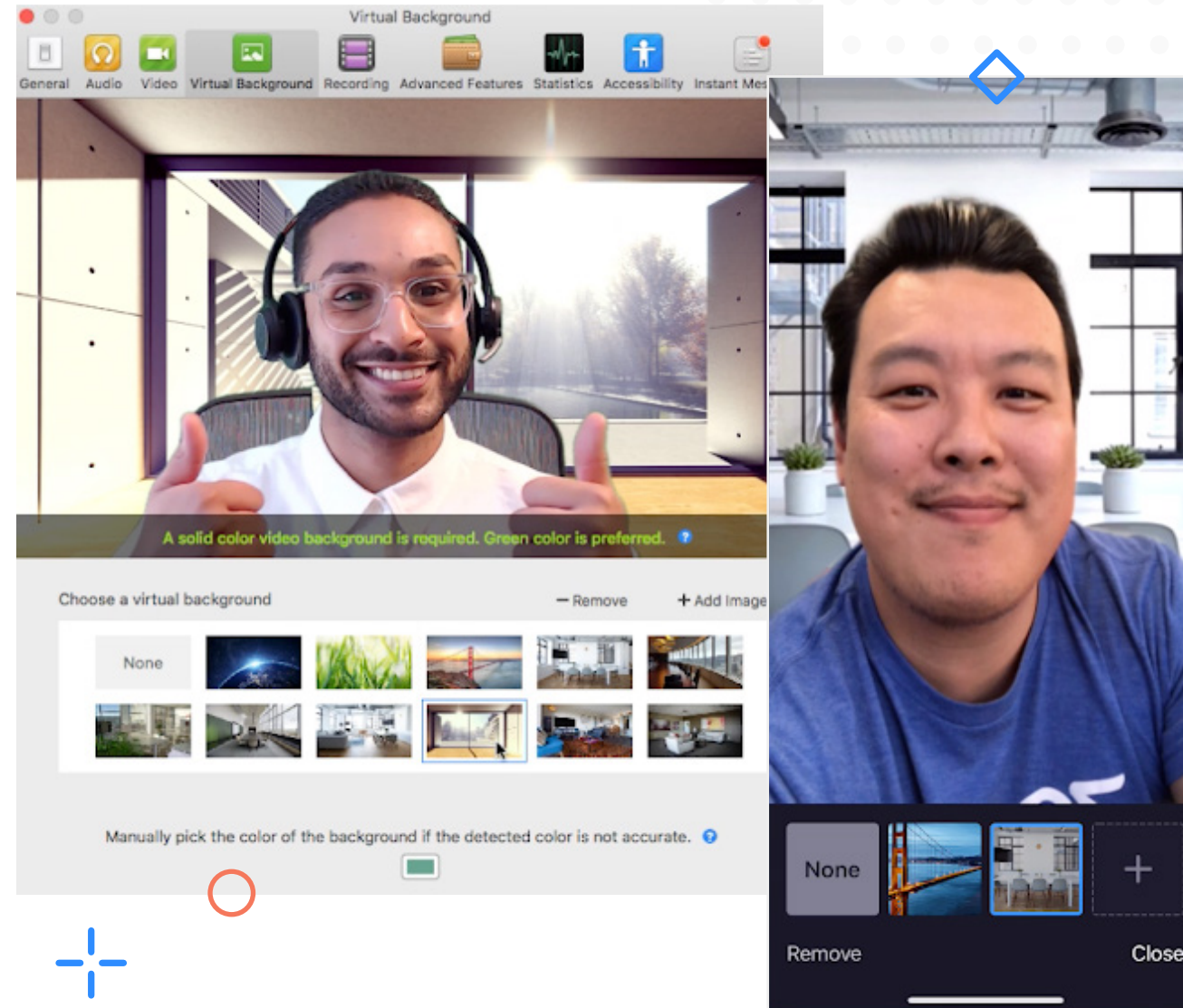
Whether your goal is to create a professional appearance or just have a fun conversation starter, a virtual background is a great asset. It's ideal for making your lowly cube look like a corner office with a view, displaying the logo of the company you are meeting with or showing your personality by seemingly joining from a yacht, the middle of the jungle, an image of your favorite sports team, anything to break the ice. Pretty much any image you can find, you can make your background. You can utilize the virtual background feature on both your mobile and desktop devices.



On your desktop device, login to the Zoom web portal and enable the virtual background feature. Then, download the Zoom Client and once you login into the client the option to set your virtual background appears in your settings.



Meeting on mobile? Just download the latest version of the Zoom app on your iPhone 8 or later models. Once you start a meeting you can choose which image you want to use. Pick from the preset photos Zoom has provided or browse your photo library to pick your favorite photo.



## Record your meeting

Recording your meeting can take the pressure off remembering specifics your prospect mentioned during your demo. You'll want to come out of the meeting knowing your next steps and action items, but you don't want to get distracted trying to jot down all your meeting notes. Record the meeting and be sure to enable a transcription feature so you can easily jump to specific points in your conversation, gather key action items, or evaluate your performance to improve for next time. Before you hit record, make sure your prospect knows your plans to record, and why you'll be recording.

## Practice your demo click path beforehand

Practicing your demo before you get your calendar slammed with requests is critical for an excellent experience, both for you and your prospect. Make sure you've practiced your click path and know what the prospect is going to be interested in, so you show them what's valuable to them.

Robert Falcone, best-selling author of *Just F\*ing Demo!*, recommends using the "You-They-You" framework:

**"You need to show your prospects only the specific features that they need to achieve what they want, so that you can get the result you're aiming for," he explains. "The success of a demo depends on your prospect's understanding the value you could add."**

Here are some tips for getting ready

- Get together with other members of your sales team and ask them for examples of click paths that have worked for them.
- Meet with your marketing team to find out which features your customers are most excited about.
- Ask your support team which features have been most difficult for folks to understand, or what kinds of information requests they're getting over and over.
- Dig into your marketing team's content strategy to find pieces of sales enablement content that might help you with your demo.
- Map out a click path—find which features you'd like to focus on for which of your company's buyer personas. Each persona will have different features or information they'll be interested in. Make a plan for each persona, so you're never caught off guard on a demo.



## Allow time for questions and feedback

Research has shown that most people's attention spans only range between 90 seconds and 10 minutes depending on the person and the subject matter. When faced with large amounts of information to process on long demos, where they're unfamiliar with the product or service, attendees can easily get lost. You can avoid this by taking short breaks throughout your demo to allow time for questions. That way, folks will go through the demo understanding your product or service, and can stay engaged throughout the process.

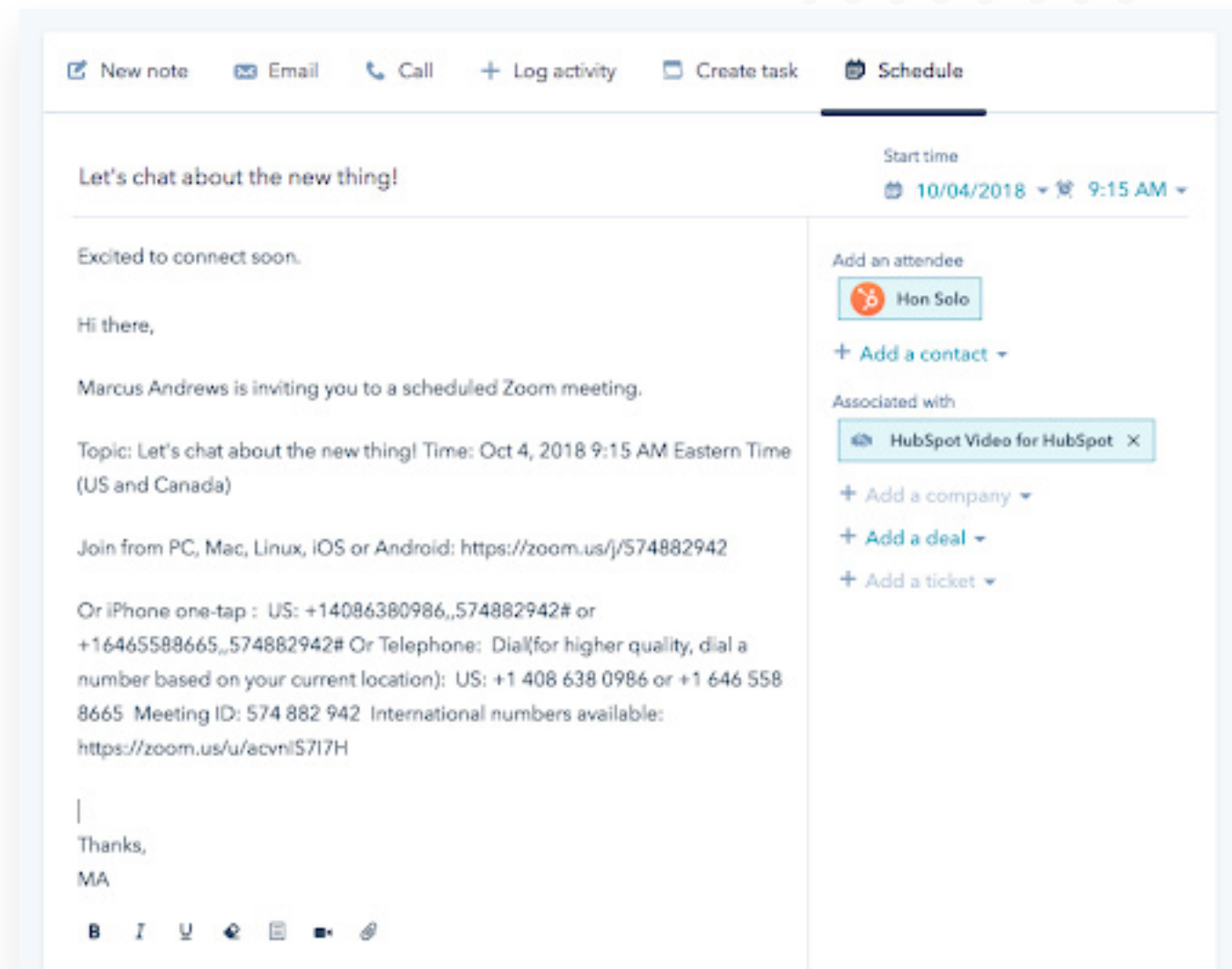
The questions you get on demos will often help you approach the prospect or customer in the right way. Depending on the questions they ask, you can zero in on specific features or information to help them make a purchasing decision, or to send follow-up content that can go a bit more in-depth than your demo time allows.



## Make the logistics of setting up demos work for you

When booking sales demos, make sure to optimize your time and your prospect's experience. Be aware of the set-up process for your prospect and create a meeting experience that's quick and easy for them. Zoom is particularly handy for external meetings because your prospects don't need to sign up for an account to join the meeting—all they have to do is click the link in your meeting invite.

With **HubSpot for Zoom**, all the prospect and customer meetings you schedule and track from the HubSpot CRM and meetings tool can now automatically be Zoom meetings. You no longer have to worry about setting meeting attendees up with a dial-in or conference solution, it'll all just work with Zoom embedded into your meetings. Using the Zoom integration with the HubSpot CRM means you can easily see all of the content your prospect has interacted with, who they've spoken to, and what stage of the buyer's journey they're in from the same place you'd book your live demo. Easy peasy.



The screenshot displays a HubSpot interface for scheduling a meeting. At the top, there are navigation options: New note, Email, Call, Log activity, Create task, and Schedule. The main content area shows a meeting titled "Let's chat about the new thing!" with a start time of 10/04/2018 at 9:15 AM. The meeting details include: "Excited to connect soon.", "Hi there,", "Marcus Andrews is inviting you to a scheduled Zoom meeting.", "Topic: Let's chat about the new thing! Time: Oct 4, 2018 9:15 AM Eastern Time (US and Canada)", "Join from PC, Mac, Linux, iOS or Android: <https://zoom.us/j/574882942>", "Or iPhone one-tap : US: +14086380986,,574882942# or +16465588665,,574882942# Or Telephone: Dial(for higher quality, dial a number based on your current location): US: +1 408 638 0986 or +1 646 558 8665 Meeting ID: 574 882 942 International numbers available: <https://zoom.us/u/acvnl57I7H>", and "Thanks, MA". On the right side, there are options to "Add an attendee" (with a "Non Solo" button), "Add a contact", "Associated with" (with a "HubSpot Video for HubSpot" button), "Add a company", "Add a deal", and "Add a ticket".



# **The Dont's of an Excellent Sales Demo**

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## Don't Get Distracted

No-one likes knowing that someone in your meeting isn't paying attention, replying to a message, or has their attention split between you and their notifications. Not being 100% present and focused on your prospect during a sales demo is a sure-fire way to lose their trust and respect for your business. Video chat is all about being human and being present. Make this the norm by setting your chat to "Do not disturb", turning off email, messaging, or chat notifications, and reducing the number of applications you have running to avoid distractions to both you and your audience.

## Avoid eating or drinking

The occasional sip of water or coffee is fine, but remember that you're on video! Everyone can see what you are doing, and there is nothing worse than someone talking with food in their mouth. Make sure to come into a demo hydrated, caffeinated, fed, and one hundred percent focused on your prospect or customer on the other end of the video call.

## Don't look sloppy

When you're on your demo video call, make sure your setting is just right. Jump into a conference room with good lighting that doesn't backlight you. Depending on where you are, lighting can get tricky. If you need to boost your set up, check out this [quick guide to lighting](#) from Wistia.

You'll want a background that does not distract from your demo (you can use a virtual background as well!), and make sure the room's sound quality is good. You don't want to start talking and notice that your voice is echoing off the walls of your conference room. Avoid being in a place that requires you to mute the background noise behind you. Invest in a great headset if you work in an open office environment.

When on camera, dress to impress. A good rule of thumb is to dress for your audience. Some companies expect to see sales reps in a collared shirt and dress coat, while others might be more casual. Even on video, it is important to appear credible to gain trust and engagement. Your company culture can help in setting the expectation for what to wear during demos and presentations.

## Death by PowerPoint

A few slides to help set expectations or offer some background information can be helpful, although most prospects or customers want to get to the heart of the meeting. Even the most beautiful slides can muddle the time that you have for your demo. Our advice—get to the live demo and get there fast. Be sure to ask the right questions up front around what your prospect is interested in or wants to hone in on, so you show off the aspects of your product or service that creates that "Ah ha" moment for your prospect.

If you think slides would be especially helpful, create a slide deck to send your prospects after your demo is over, so they have some key information they might need about your feature set or types of services you offer to help them convince their management and make a purchasing decision.



## Post Demo Follow Up

Once your live demo ends, it is important to follow up with your prospect to continue the momentum and stay top of mind.

**Follow these steps post-meeting, and you'll be on the road to closing**



- **Do** conduct an after action review. Immediately after the demo, figure out what went well, what you did poorly, how you thought the prospect reacted, and what follow up actions you should take to keep them engaged. Review the recording and grab action items from the audio transcript.
- **Do** talk to your marketing team. If you have sales enablement content available that will help you make the sale, use it in a follow up with the prospect. Make sure to sync up with your team to find out what types of content might be helpful.
- **Do** be quick. Send a follow up email within one hour of the demo's completion, so your prospect knows that they're top of mind for your team. Ask any follow up questions you need to know to help get the prospect the information they need.
- **Do** consider sending a follow up video. Getting back on camera and following up in a more human way than the standard email can help create a better rapport with your prospects and add a touch of delight. If you're comfortable, use these tips and jump back on screen!
- **Do** make it about them. Your follow up email should be centered on how your solution can help your prospect, not about how great your product is. Focus on the problem you are helping them solve, and remember that you're trying to build a trusting relationship with your prospect.



From here, you're all set to create an excellent sales demo process that will help you close more deals, and build more valuable relationships with your audience.

What are you waiting for?

Jump on video!

HubSpot | zoom