Demo Planning Document

Purpose: The Effective Demo

When creating demos (unless requested for technical deep dives, configurations, or similar), we walk through a story from the target user's perspective and how any use-case scenarios they experience will lead us to features in the product that solves the problem.

Our goal is *not* to start with features themselves, but to start with the *problems* that those features solve; enabling the customer to imagine the experience of solving these or similar problems with ease, delight, and absolute clarity.

Requirements Questions

Use the following questions to help gather requirements needed for designing the demo:

1. Who is the target user?
   This is the user to benefit from using the product, feature, or solution being demonstrated.
2. What problem does this product, feature, or solution solve for the target user?
   This definition should not include any technical specifications (unless absolutely necessary from a foundational requirement) or any feature-facing capabilities.
3. What specific features solve the problems identified?
   Should they be presented in a particular order? What kind of data do they require?
4. What story can best cover the problems (and corresponding features) identified?
   This might follow a "day in the life" narrative or specific (and common) scenarios.

Gathered Requirements

Problem	Scenario	Feature	Data
The problem discovered in the target user's workflow during discovery	*A real-life situation that could better explain how this problem is experienced*	*The feature or solution that solves this problem and should be demonstrated*	*Data to populate the demo to make this problem / scenario resonate with users*

Technical Details

Login Credentials & Environment

URL	URL of Login
Email	Email used for target user's role
Password	Password to account
Environment requirements	Does it require a particular server?
Special Notes	Other important details for the demo's technical configuration or setup

Demo Script

Use this format

View / Screen	Scripted Language (Outline)	Action / User Control
E.g. Critical Path dashboard	* You can find details to discover "what happened" by hovering over the time block * This shows you ==activity, associated company, and any comments== left from other users	Hover * Over time block * Reveal information