Portal Demo Script

This is a sample demo script that shows what to cover and how to demo the Chanimal / SaaSMAX portal in seven minutes (it won’t work with other portals, but it may still show what should be covered (even if the structure is different)). It was created after watching a vendor take over an hour to review the portal with a reseller (who obviously cleared a lot of email during the call since it was deathly boring and a terrible start to your relationship (they now know to avoid any meetings with you since ). You don’t have to cover everything within the portal, just the main policy areas where resellers usually get in trouble, and the main content they should download initially.

It follows a linear left to right format and is not difficult to pick up (usually practice 4-5 times). If you demos last longer than 10 minutes—then memorize it since you are covering too much. You would usually start with the portal, then give a product demo (if they have not already seen it—it should also have a demo script and be in the 17 minute range). Do a search and replace to swap Acme with your own company and modify the areas in yellow. You would typically have the reseller logged in on their side during the demo since you will want to confirm that their login works and you’ll ask them to download a few files as you proceed.

Demo Script

Hi,

My name is \_\_\_\_\_\_, I’m the Partner Program Manager for **Acme software** and I’ll be taking you through a short orientation. I'll first cover the portal site, so you can see where your buckets of content are and a few of the policies you'll want to know about--including our jumpstart bonus. Next, you'll see a high level product demo. Then I'll show you how to place an order and talk about the next steps.

You should have the portal URL, plus your own password. You may wish to follow along within the portal since there are some files I'll recommend you download immediately.

Do you have your portal info in front of you? Good.

OK, let's get into the portal. This is the **Acme Partner Portal**. After you log in, the home page features the company news, partner news and current promotions.

You’ll notice shortcuts to several of the most frequently accessed areas like deal registration, MDF requests, links to your PowerPoints, and more.

As you'll notice from the menus above that the site is divided into buckets of content for policies (under My Account), marketing, sales and support.

Let’s start with the lead policy.

All leads are classified as A, B or C. "C" leads are not fully qualified, so we only send you A and B. The main takeaway is you need to reply with ACCEPT within 2 days after we send you any lead to claim it. You may or may not cover that region or have the time to follow up--in which case reply with NO. Otherwise, when you accept a lead, consider it "pre-registered." If the lead is an A, it is because they requested immediate contact--please contact them within 2 working days. If it is a B, then contact within 5 working days. If you can't then we'll forward the lead to someone else.

The nice thing is your lead will tell you the size and time frame of the deal, who else they are considering and more. It will also include detailed dialogues that will help you know how to follow up--resellers who get these leads love the helpful information.

Any questions?

On the left menu there is a copy of the partner agreement, a place to change your personal data and a sample of the reseller locator--which I'm going to select.

You'll want to notify us when you have the product on your website so we can get you on the reseller locator. Then you can come back here to confirm you are listed. We'll follow up with you after the orientation to give you sample product copy (usually a landing page) that you can list on your site.

For obvious reasons, we cannot send you any leads until we see the product on your website.

Now, let’s go to marketing tools.

The first item explains the MDF policy. Below is a request form that you can use so we can consider joint marketing activities for your area.

On the left menu you'll also see areas to order supplies, like product slicks, product descriptions--but let's click on the price list.

You may want to download this price PDF while we’re on this page. All pricing is MSRP--your cost is the list minus your margins. Are you able to download the pricing?

You'll also want to go into the PowerPoint section. This is a "persuasive" PowerPoint that can be used to sell the product--not just inform. We'll show how this is used within our product demo. You should click the link and download this PowerPoint so you have it for your files.

We also have a sample demo script and videos that show the advantage of the product and help with training.

The next section is Competitive Analysis--and you will definitely want to download this. It shows how our application(s) compare to the alternatives. I'll open it just for a second. In medical terms, all this red is "hemorrhaging." It will help you answer the question--why is it better. Are you able to download it?

We also have white papers that you can use to get leads on your website.

Plus, the promotional templates shown here will show how to optimize your website with SEO for local leads, plus how to introduce the product via email. You can come back later for the email template.

There's also sample testimonials and case studies you can use, plus market information that explains who uses the product, the avg deal size, the sales cycle and more--great if you are new to the market space.

Finally, there is a sample landing page that you can use to model your own product page. It is pre-optimized with the key words that will help you get local leads, but you have to swap out the company name and the single city you want to optimize for. When you use the copy and follow the instructions, it should put you on the top third of the first page every time—so you will have the best chance of getting local leads.

The next area on the top menu is Sales Tools.

Let's click on the deal registration policy so you'll know how to register a deal. I'll go through some of this with you--since it is critical to get your full margin.

We do not have territories. Instead, you have a chance to register your deals. Here's your benefits:

You get extra margin when you register the deal. This gives you a pricing and margin advantage over competitors. Currently we pay 10% more for every registered deal.

When you complete the basic form, we try to accept it within 24 hours, or email you if rejected--usually because someone else has already registered the deal. If you can register it, we will ONLY support you with demos, pre-sale support, helping you complete the quote--we will not help anyone else with these items. Plus, we won't sell into the account, or if they somehow place the order by contacting us--you will get full credit.

If you can't register the deal because another partner registered it first, then we can't help you with these items--we have to dance with the one who brought us to the dance. If you wish, you can still try to work with the account (we don't want to tell the customer where they have to buy)--but you don't get the extra margin and support and have to win it on your own.

Our advantage is we can better forecast the sales pipeline, but we also know which deals are happening so we can help you anyway possible to win the business.

If you read the details, your registration is valid for 90 days and may be renewed, and all pricing is locked for you during this period.

If we send you a lead--then it is pre-registered. But there is also a request to not introduce another product to a lead we provide, or we reserve the right to give the lead to someone else. The main thing--we are committed to win or lose the deal together and help you any way we can.

Any questions?

Ok. The next section is where you would register your deals--there is also a link from the portal home page. You would typically register just before you give them a demo--since that's when they would tell you if they've already seen it... which is a red flag that's its probably already taken and you'll have to decide how to proceed.

The deal reg process is fairly simple and shouldn't take more than a few minutes--but will increase your margin and help you get exclusive sales and tech support, so it's always worth it.

The next area is the Current Promotions.

The first is for NFR access. Notice the special promotions if you want access for individuals for demos and learning.

The second promotion is the 90 day jump-start bonus. You get an extra 10% for any deals you register (during the registration period) or close within your first 90 days. This will help compensate for the opportunity cost of learning the product--and provide an incentive to get started selling.

You can also click on the NFR page for more details about the program and to take the quiz.

The SUPPORT section gives you the contact information.

It will also list any product issues if any at the time, and then later it will contain information about additional training and certification. There is also a basic forum if you want to collaborate with other partners.

Let's return to the portal home page and see if there are any questions?

Feedback?

Ok, next we'll have a high-level product demo. You can see a copy of the demo script used within the Marketing Tools.

Now let me turn it over to... for the product demo.