LoftyBiz Demo Planning Worksheet

Plan a demo or presentation backwards from the decisions your buyer has to make, show a live result, and finish with a clear next step.

Companion download for LoftyBiz 128 — Demos and Presentations That End in a Decision.

Example figures. General education, not financial, legal or tax advice. Results vary. These are examples, not promises. Prices and close rates in the video are rough examples, not targets or sales forecasts.
You can keep the decision page, the section timings and your prep checklist as SOPs in one place in Systex, our own product. You can find Systex at loftybiz.net, or click the link in the description.

1. Write the buyer's three decisions first

Before you build a single slide, write down the decisions the buyer has to make. Everything in the demo should help with one of those decisions. If a slide does not, it goes. In the office fit-out example, the three decisions were:

The buyer must decide	Your wording for this buyer
Does this layout fit the way my team works?	
Can it be done before our move-in date?	
Does the price fit our budget?	
(Replace these with your buyer's three decisions)	

2. Cut what does not serve those decisions

In the worked example, the supplier slide went, the company history went, and twenty-five slides became seven. List every section you usually present, and keep only what helps with one of the three decisions.

Section or slide	Serves which decision?	Keep / cut

3. Plan one live result using their details

Ask for their details a few days before the meeting, then show a result built on those details — not a promise. In the fit-out example, that was a layout for their actual room, with their desks and storage, that the buyer could adjust in the room. For a committee, it was a before-and-after of their own property, plus an estimate clearly labelled as an estimate. Nothing in that plan was a promise. It was a plan they could check.

Live-result prep	Your notes
What details will you ask them to send beforehand?	
What will you show live, using those details?	
What can they change or check in the room?	

4. Give every section a job and a time

In the fit-out example, the timings were: two minutes to confirm what they had already told her; ten minutes on the layout; five minutes on the timeline, working back from the move-in date; five minutes on price, with two options.

Section	Job it does	Minutes
Confirm what they have already told you		
Live result / main proof		
Timeline or delivery		
Price and options		
Decision page		

5. Write the decision page, and a smaller step

The last page is not “Thank you, any questions?” It is a simple decision page. In the single-buyer example: “Option A or option B? Start date? Who signs off?” Read it out and ask, “Which of these can we settle today?” Three questions was the right number; six felt like a corner. Send the decision page the day before, so nobody is surprised. With a group, first ask: “What does the board need to agree on to make a change?” Then end with the biggest decision they can actually make in the room. In the landscaping example, that was a trial — one building for three months, at the same monthly rate as the full contract — plus a one-page summary for the minutes, with the trial terms and the date of the review. Do not push a board to decide something its own rules do not allow.

Decision-page item	Your wording
The main choice you will ask them to make today	
Start date, who signs off, or other settle-today items	
The smaller step if they cannot decide today	
For a group: what they said they can decide in the room	
Date you will send this page (ideally the day before)	

6. Your next demo

Task	Done
Write down the three decisions your buyer must make	■
Cross out every slide that does not help with one of them	■
Plan one live result using their details	■
Write the choice, and the smaller step if they cannot decide today	■
Put that decision page and the prep checklist into Systex	■

A clear no is better than a polite maybe. Put the routine in Systex so everyone on the team can run the same demo plan.