



FIELD NOTES / 03 / DEMOS AND BUYING PROGRESS

A good demo is not a buying decision.

End the demo with a task the buyer agrees to do, the blockers that matter and a clear next commitment.

WHAT YOU WILL DO

After a demo, agree what the buyer still needs to establish, who will do the work and what decision the result will support.



SOURCE



INSIGHT



APPLICATION

ARTICLE / FILLABLE WORKSHEET / SOURCE NOTES



“Looks good” tells you very little.

If you manage account executives, read the notes from a recent successful demo. Do they explain what the buyer will do next, or just what the salesperson plans to send? A polished presentation can establish interest. It does not establish that the customer can implement the product, fund the purchase or persuade the people who were missing from the call.

Consider a fictional sales opportunity. A revenue operations manager watches your renewal-planning software identify accounts needing attention. They like it. The salesperson promises a proposal. But nobody has established whether the customer's renewal dates are reliable, who would maintain them or whether the customer success lead would use the output. The proposal could price a job neither side has properly defined.

Our recommendation is to end a useful demo by agreeing the next piece of buying work. That might be a task, a review by another stakeholder or a specific technical check. It does not have to be a formal trial. It does need an owner on the buyer's side and a clear explanation of what the answer will let them decide.

Choose one question the buyer needs answered.

Before presenting more features, ask what remains uncertain. In our fictional deal, the useful question is whether the customer success team can produce a credible renewal-priority list from its current records. Showing another dashboard will not settle that. A short evaluation using a permitted sample could. Agree what a useful output contains before asking the customer to do the work.

Here, the list needs an account owner, renewal date and an understandable reason to follow up. The revenue operations manager prepares the approved sample. The customer success lead reviews whether the list is useful. Your team provides access and explains the setup. These are proposed responsibilities for this example, not a standard package every buyer should be forced to complete.

Keep the work proportionate to the uncertainty. If a documented security answer resolves the concern, send it to the person reviewing security. If a brief overview is all an early conversation needs, do not manufacture a trial. Use hands-on work when the decision depends on practical use. An evaluation that consumes the buyer's time without settling anything is just more sales theatre.



Agree the work on both sides.

State what each person will do and by when. Ask the buyer whether they can make that commitment rather than quietly assigning homework in a follow-up email. In the fictional example, the operations manager agrees to supply the approved sample before a working session. The customer success lead agrees to assess the output at that session. The seller prepares access and records any help provided.

Name the blockers separately. Permission to share data may be missing. A stakeholder may lack time. Budget may be unapproved even if the task succeeds. Put an owner and a next action against each relevant issue; do not mark the whole opportunity as ready just because the product performed well. Passing a practical evaluation does not settle a financial or procurement question.

At the session, keep the actual result. Record where your team cleaned inputs, changed configuration or supplied specialist help. The buyer needs to understand what repeating the task would require. If the sample cannot produce a useful list, investigate that gap before expanding the proposal. If the product cannot meet the need, say so. A glowing recap cannot fix an unusable result.

Send an agreement, not a cheerful recap.

Here is the completed next-step sheet for the fictional deal. Buying question: can the CS team prioritise renewals from current records? Buyer owner: the operations manager. Task and result: prepare a permitted sample and produce a list the CS lead can use. Joint commitments: buyer supplies approved inputs on Tuesday; seller prepares access for Thursday. Blockers: data-sharing approval and budget confirmation. Next decision: review the result with CS on Thursday, then decide whether to scope a rollout.

Add the dates both sides actually agreed. Send the sheet for correction, not as a record of assumptions you hope are true. If the buyer will not commit, ask whether the task is worthwhile, whether timing is wrong or whether someone else owns the decision. A polite demo without an agreed next action is still only interest. Do not forecast a purchase from applause.



Agree what happens after the demo.

Complete this with the buyer. Record actual agreements; leave an unconfirmed owner or date visibly unconfirmed.

Type into the fields, or print. Save a copy to retain your answers.

01 The buying question

What must the buyer establish before making the next decision?

02 The buyer owner

Who on the buyer's side agrees to organise or assess the next step?

03 The task and result

What will be done, and what would make the result useful?

04 The joint commitments

What will the buyer and seller each supply, and by which agreed dates?

05 The blockers

What data, people, budget or approval is missing? Who follows up?

06 The next decision

Who reviews the result, when, and what choice will it help them make?

Treat buyer-confirmed work as progress. Keep unresolved product, implementation and purchase requirements separate.



Read further. Know the limits.

SOURCE 01 / PRACTITIONER INTERVIEW PUBLISHED BY AN INVESTOR

The GTM Inflection Points That Powered Clay to a \$1B+ Valuation

First Round Review; interview with Varun Anand / First Round Review / 23 January 2025

Historical practitioner background retained from the earlier edition. This rewrite does not repeat a Clay outcome or use the interview to validate its buyer-owned evaluation steps. The proposed responsibilities and worksheet are GTM Architect judgement; no current support recheck was performed.

<https://review.firstround.com/the-gtm-inflection-points-that-powered-clay-to-a-1b-valuation/>

SOURCE 02 / FOUNDER INTERVIEW AND COMPANY HISTORY

Vanta's Path to Product-Market Fit - Solve the Customer's Problem, Then Write Code

First Round Review; interview with Christina Cacioppo / First Round Review / 29 August 2023

Historical founder background retained from the earlier edition. This rewrite does not present Vanta's early product work as evidence of modern sales-demo performance or of the proposed next-step agreement. No current support recheck was performed.

<https://review.firstround.com/vantas-path-to-product-market-fit/>

OUR GUIDANCE. YOUR COMPANY'S NUMBERS.

The article and worksheet are original GTM Architect guidance. References above are background reading, not proof that our proposed approach will produce a particular result. Source dates and limitations are preserved.

Rewritten 6 October 2026. Worked examples are fictional and use illustrative assumptions, not industry benchmarks. Named companies and publishers have not endorsed these guides.

Use the worksheet with one real task, deal or customer. Replace the example assumptions with your own information before acting.