

Vendor Demo Script

Run consistent, revealing demos of digital adoption platforms so you can compare vendors fairly

How to use this template: send sections 1 and 2 to each vendor a week before the demo so they prepare on your scenarios, not their standard pitch. Use section 3 during the demo and score each vendor with the AdoptionStack vendor scoring sheet.

1. Demo logistics

Item	Details
Vendor	[Name]
Date and time	[Date, 90 minutes]
Our attendees	[Business owner, content author, IT, security, end-user representative]
Environment	[Vendor builds on a test instance of our application, or a screen share of our app]

2. Agenda (send to the vendor)

Time	Section
0–10 min	Introductions and our goals (we present)
10–40 min	Scenario walkthroughs on our application (vendor presents)
40–55 min	Live build: our content author builds a short walkthrough with vendor guidance
55–70 min	Analytics, administration and content maintenance
70–85 min	Security, implementation, support and pricing questions
85–90 min	Next steps

3. Scenarios to demonstrate

Scenario A: guide a new user through a key task

- Show a walkthrough for [e.g. creating an opportunity] on our application.
- Show how the guidance targets only [role, e.g. new sales reps].
- Show what happens if the user leaves the flow halfway through.

Scenario B: prevent a data quality error

- Show a tip or validation on [field] that stops an incorrect entry.

Scenario C: self-help

- A user searches "[common question from our service desk]". Show what they find.

Scenario D: an application update breaks guidance

- Show how the platform detects broken content and how an author fixes it.

Scenario E: prove impact

- Show a report of guide completion and a business process funnel for scenario A.

4. Questions to ask

Area	Question	Notes
Fit	Which of our applications have you deployed on before? Any known limitations?	
Authoring	How long would it take our own author to build the scenario A walkthrough?	
Maintenance	How much authoring time do similar customers spend per month?	
Analytics	Can we export data to our BI tool? How long is data retained?	
Security	What data do you collect from our application, and where is it stored?	
Implementation	What does a typical first 90 days look like, and who does the work?	
Support	What support is included, and what are the response times?	
Pricing	How are applications and users counted? What is the renewal cap?	
References	Can we speak to two customers with a similar application stack?	

5. After the demo

- Each attendee scores the vendor independently within 24 hours.
- Compare scores in the vendor scoring sheet and note evidence for each.
- Shortlist two vendors for a proof of concept on your own application.