



SAAS ACADEMY

ROCKET DEMO SCORECARD™

*10-POINT SALES DEMO SCORECARD TO KNOW WHERE
AND HOW YOU'RE LEAVING MONEY ON THE TABLE*



THE ROCKET DEMO SCORECARD™



10-POINT SALES DEMO SCORECARD TO KNOW WHERE AND HOW YOU'RE LEAVING MONEY ON THE TABLE

Hey I'm **Dan Martell**, 5x founder, investor in over 40+ startups, and proud husband and father.

I'm also the creator of **SaaS Academy** where I coach B2B SaaS founders (like ClickFunnels, AgoraPulse, Carrot.com) how to generate more qualified leads, win more software demos, and scale smoothly.

In this brand new scorecard, you're going to discover where deals are falling through the cracks and how you can turbo-charge your demos to **DOUBLE** your closing rate.

Bottom line: after you've implemented this scorecard, I guarantee you'll start closing **MORE** deals **FASTER** than ever before.

Better yet. It'll send your confidence, your team's confidence, and your new customer's confidence through the roof.

Sounds good? Sweet.

Let's dive right in.

DEMO NOT TOUR

CONNECT TO PAIN

LEAD BY QUESTION

MONEY SHOT

THE VIRTUAL CLOSE

OUTCOME FOCUSED

YES

Does your demo focus on outcomes instead of just giving them a tour of the software and all its possible use cases?

PAIN FOCUSED

YES

Do your demos connect emotionally with your prospect's real pain points?

SERVE OVER SELL

YES

Are you genuinely curious about your prospects? And do you set an agenda to run the call smoothly?

THE VIRTUAL CLOSE

YES

Are you asking questions that get the client excited to move forward and uncover hidden obstacles?

POSITIVE FRICTION

YES

Does your packaging create positive friction so users upgrade? (E.g. limited access, limited storage, limited users, etc.) 3 elements of positive friction are good, 5 are better.

CONVERSATION NOT PRESENTATION

YES

Are your sales calls a two-way conversation instead of a one-way presentation with you doing all the talking?

STRETCHING THE GAP

YES

Are you creating a clear gap between where they are and where they want to be?

THE 30/70 RULE

YES

Do you spend the majority of the call listening and leading by asking good questions?

TIE BACK TO THE PROBLEM

YES

Do you tie a solution back to their problem multiple times before you move onto the next feature?

IDENTIFYING THE DECISION MAKER(S)

YES

Do you get clear on who the decision makers are to uncover any hidden obstacles?

TOTAL

TOTAL

TOTAL

TOTAL

TOTAL

Bonus Point: Do you use BAMFAM (book a meeting from a meeting) to schedule follow-up calls?

Add up all your scores from the above and calculate your final score out of 10 TOTAL SCORE

HOW WELL DID YOUR DEMO DO?

1 - 4

NEEDS WORK

You're likely leaving more than 50% of deals on the table.



"Pete"

(SaaS provider of an OKR software)

Pete applied the Rocket Demo framework and is now getting around 25% conversion.

5 - 7

GOOD

Not bad, you're closing a lot of deals, but you're still leaving 30% of deals on the table.



"Matt"

(SaaS provider of a fitness CRM)

Matt applied the Rocket Demo sales process - and has skyrocketed his team's closing rates.

8 - 10

GREAT

This is great, you're closing a lot of the deals you should be closing! But could there still be a few more deals you're missing out on?



"Stuart"

(Provider of SaaS software that helps dentists)

Stuart applied the Rocket Demo sales process to a new customer and signed him up for 2 years up front!

5 STEPS TO A GREAT DEMO



1

**DEMO
NOT
TOUR**

2

**CONNECT
TO
PAIN**

3

**LEAD
BY
QUESTION**

4

**MONEY
SHOT**

5

**THE
VIRTUAL
CLOSE**



1

DEMO NOT TOUR



Many founders approach demos like a tour. They show prospects how to click around the app, they show them the dashboard, and they bore them with all the features.

But showing prospects around your software is not a sales responsibility. It's a customer support responsibility. A demo is about having a sales conversation.

See, in a demo, your mission is to communicate the value of your solution. And you want to focus on the outcomes your prospect needs. That's how you close the deal.

Action Step: Map out the top three outcomes each potential customer values in your solution before the call - and focus on those.



2 **CONNECT TO PAIN**

To have prospects whipping out their credit cards, you need to understand their pains and frustrations.

It's not enough to skim over the outcome your product gives, you need to create a little 'emotional friction' when you sell. No pain, no sale.

For example, your prospect might be looking for a better way to communicate with their team. To reconnect them to that pain, talk to them about their desired outcome. What do they want to accomplish? What does that result look like?

Once they've told you about where they want to be, draw their attention back to where they are now. And show

them what their problem is really costing them. I call this 'stretching the gap'.

It works like magic. And most importantly, stretching the gap shows your prospects the value of your solution. Because remember, prospects don't buy a product – prospects buy their way out of pain.

Action Step: Always be learning about your prospects and their pain points, before AND during the call. It might require some research and prep beforehand, but it's worth it.





3

LEAD BY QUESTIONS

Barbara Walters is arguably one of the best interviewers in the modern age. She's interviewed the who's who of politics, finance, entertainment, technology and real influencers in the world.

She just has a way of becoming super curious in a way that's really exciting for her interviewees. I'm sure at some point, they just get to a place where they feel so comfortable talking with her they don't even realize they're being interviewed on camera!



They answer questions that they usually would have avoided. It just feels really natural and exciting. It's because Barbara actually cares. And that's what you need to do too. You need to genuinely care and be curious about your prospects.

You need to be excited about what they could achieve with your product. And the only "nerves" you should feel, should be nerves of FOMO - if they were to miss out on your solution.

So lead by questions. Ask questions that guide the conversation in

a natural and exciting way. You should have your questions figured out in advance so they sound natural and non-robotic on the call.

Action Step: As a sales person, the conversation should be a 30/70 split. Aim to ask questions and speak 30% of the time, and let them answer and speak 70% of the time.



4 MONEY SHOT

When you're doing a demo, typically, you'll want to focus on three key pain points and reveal how your product solves them. You're going to show them one after another and peg your product as the solution.

The first feature is the most important, and that's what I call the mic drop. If you do this right and you're smart about which feature you focus on, you should have a mic drop moment on your first feature.

That first feature should be such a powerful solution to their problem that you'd be able to drop the mic and the demo would be over. They should be so amazed that they don't need to see any more.

And guess what? That's when you hit them with the "but wait, there's more!" and reveal the other features that solve their problems. That's the power of the money shot.



Action Step: Remember to peg features back to problems. You've got to remind them. "You mentioned this problem, here's how our feature solves that problem."



5 **THE VIRTUAL CLOSE**

The virtual close is an opportunity to uncover any hidden obstacles before you go for the close. One of my favorite virtual close questions is, "Are there other people involved in making this decision?" It's clean, and it's simple.

A lot of prospects get stuck here. They want to move forward, but they don't have the final say. That's why we want to ask upfront. If you want, you could even ask these

questions throughout the sales cycle to uncover hidden obstacles.

Finally, the virtual close is also an opportunity to ask questions that get the prospects excited about moving forward. In summary, ask questions that make the prospect excited. And the, find out what would need to be true for the deal to happen.



Book a meeting from a meeting (**BAMFAM**) is a game changer for sales follow-up. Instead of booking a follow-up call through back and forth email, get prospects to commit to a time **WHILE** you're on the call. Try it, it works magic.

ROCKET DEMO BUILDER™

Creating a Rocket Demo requires you to prescribe a solution to a customer's pains by diagnosing their key problems, only demoing the features that address those needs, and asking questions to check-in for value.

Name:

Date:

| | | |
|---|---|---|
| PREP Research Business. Diagnose their problems. | ORCHESTRATE Appreciate. Check. End Goal. (ACE) | AGENDA Review key features. Provide overview of product. |
| FEATURE #1 Address questions? See yourself using it? Impact on your business? | FEATURE #2 Address questions? See yourself using it? Impact on your business? | FEATURE #3 Address questions? See yourself using it? Impact on your business? |
| REVIEW Summarize key points. Answer Questions. | CLOSE Ready to move forward? Decision Makers. Virtual close. | FOLLOW UP Book a meeting from a meeting. |



READY TO TURN YOUR SAAS INTO A SALES MACHINE?

NEXT STEPS

Congratulations for taking the time to use this resource and grade your own software demos. You should now know exactly where and how deals are slipping through your fingers. And know how to fix it!

I'm excited for you.

If you haven't gone through this resource from start to finish yet, I encourage you to invest some time into this.

This is the same scorecard that has helped hundreds of founders close up to TWICE as many deals. And I want you to achieve similar results.

That said, this scorecard is just the first step in dialing in your sales systems and unlocking your true SaaS growth potential.

Without nailing lead gen and dialing in many other systems, this scorecard will only take you so far before you reach the next growth ceiling.

Which is why I have something for you...

If you're an ambitious SaaS founder serious about growing your business to new heights, you may be interested in hands-on help from me and my team.

To get a growth plan for your SaaS business, [book a Growth Session with one of my SaaS Scaling Specialists now.](#)

On the call, we'll uncover the #1 thing holding you back right now, identify your top growth levers for the next few quarters, and give you a 3-step action plan that'll get you results ASAP.



click here →

BOOK A GROWTH SESSION