

Preparing for Your Next Tech Demo

Think all you need to do is show up? Think again.



Evaluating new advisor technology is a time-consuming — but critical — part of growing your business. And if you're not prepared for tech demonstrations, it's almost impossible to get exactly what you need out of them.

Follow our guide to make the most out of your next tech demo.

Before the Demo



During the Demo



After the Demo

1. Think about the features and functions your firm needs. Separate them into the following categories:

- Absolutely Need
- Nice to Have
- Needs Improvement
- Can Live Without
- Not Necessary

2. Visit the tech provider's website:

- Review the Features information
- Look for tools that perhaps you haven't previously considered; add them to your list
- Check out the Integrations page. Does the new technology work well with third-party tools you're already using?
- What about their Resources page? Is the blog up to date? Are there free webinar offerings and consistent release notes?

1. Be ready to explain your firm's needs: the structure, the types of clients you typically work with, and the functionality you're expecting to see.

2. Be specific! Don't say "I want to see reporting." Explain what kind of reporting is important to your firm.

3. Be prepared with the workflows you want to see, and make sure you actually get to see them. Don't settle for "Yes, we can do that."

4. Ask questions. When you see something of interest, ask for a deeper dive.

5. Most importantly, be open to change. In many cases, these demos offer an opportunity to consider approaching your workflows in new ways.

1. Understand that you won't get through everything you need during the first demo; be prepared to schedule at least two more calls to dive deeper into critical functionality.

2. Make sure the members of your team who will be performing these critical workflows are available to sit in on the additional demos.

3. Talk to other tech providers who integrate with the technology you're evaluating. Find out how easy — or not — they are to work with.

4. Follow up with the technologies you don't choose, and let them know why. Doing so could help you in the future, since companies use this feedback to improve their offerings.

5. The decision to change your firm's technology is a big one. Take the time to prepare for the demos you'll be attending so you can be certain you're armed with all the information you need to take your firm to the next level.

Ready to put your demo skills to the test?



CONTACT US TODAY to see how Orion technology can be the solution your firm absolutely needs.
orionadvisortech.com/contact/ | info@orion.com 402.496.3513