DEPARTMENT OF MANAGEMENT

Demo for Ben

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Platform Demonstration Policy

1. Purpose

This policy establishes the official guidelines and procedures for demonstrating the company's platform to any external or internal audience. The purpose is to ensure all demonstrations are professional, consistent, secure, and accurately reflect our brand and product capabilities. Adherence to this policy protects our intellectual property, customer data, and corporate reputation while providing a high-quality experience for prospects, customers, and partners.

2. Scope

This policy applies to all company employees, contractors, and authorized agents who conduct, support, or participate in demonstrations of the company's platform. This includes, but is not limited to, personnel in the following departments:

- Sales and Business Development
- Solutions Engineering and Pre-Sales
- Customer Success and Account Management
- Marketing
- Product Management
- Training and Enablement

This policy covers all forms of platform demonstration, including live web-based demos, in-person presentations, pre-recorded videos, and interactive sandboxes provided to external parties such as prospective customers, existing clients, partners, investors, and media representatives.

3. Policy Statement

All platform demonstrations must be conducted in accordance with the following core principles:

- **Authorized Environments Only:** Demonstrations *must* be conducted using a dedicated, company-approved demonstration environment. Using the live production environment or any environment containing real customer data for demonstration purposes is strictly prohibited.

- **Sanitized Data:** The demonstration environment must be populated exclusively with non-sensitive, fictional, or anonymized sample data. Under no circumstances shall real customer data, personally identifiable information (PII), or any other confidential information be used or displayed.
- **Approved Messaging and Content:** All demonstrations must align with the latest official company messaging, branding, and product positioning. Presenters must use company-approved slide decks, talk tracks, and other collateral provided by the Marketing and Product teams.
- **Feature Representation:** Presenters must represent the platform's features and capabilities accurately.
  - Features that are not yet generally available (e.g., beta, alpha, or in development) must not be shown without explicit, written pre-approval from the Head of Product.
  - If an approved future feature is shown, it must be clearly identified as such, with appropriate disclaimers regarding its final state and release timeline.
- **Confidentiality and Security:** All presenters are responsible for protecting the company's confidential information during a demonstration. This includes avoiding the exposure of internal system configurations, source code, infrastructure details, or business-sensitive information.
- **Recording Consent:** If a demonstration is to be recorded, the presenter must obtain verbal or written consent from all external participants *before* starting the recording. All recordings are the property of the company and must be stored in a designated, secure company system.

4. Procedures

To ensure consistency and quality, all personnel must follow this three-stage process for platform demonstrations.

A. Pre-Demonstration Preparation

1. **Discovery and Qualification:** Before scheduling a demo, conduct a discovery session with the audience to understand their specific needs, challenges, and goals. This ensures the demonstration can be tailored to be as relevant and impactful as possible.
2. **Environment Setup:** Access the designated demonstration environment. Ensure it is configured correctly for the specific use case being presented. If necessary, reset the environment to its default state to remove any customizations from previous demos.

3. **Agenda and Content:** Prepare a clear agenda and share it with the audience in advance. Customize the presentation flow and talking points based on the discovery findings, using approved templates and content as the foundation.
4. **Dry Run:** For high-stakes demonstrations, conduct an internal dry run to test the technical setup, workflow, and messaging.

B. Conducting the Demonstration

1. **Introduction:** Begin by stating the purpose of the meeting, reviewing the agenda, and confirming the attendees' objectives.
2. **Value-Oriented Presentation:** Focus the demonstration on the value and solutions the platform provides, not just on its features. Connect platform capabilities directly to the audience's stated pain points and goals.
3. **Question Handling:** Answer questions honestly and professionally. If you do not know the answer to a question, do not speculate. Instead, state, *"That's an excellent question. Let me confirm with our product team and get back to you with an accurate answer."* All follow-up actions must be documented.
4. **Conclusion:** End the demonstration by summarizing the key value points discussed and outlining clear, mutually agreed-upon next steps.

C. Post-Demonstration Activities

1. **Log the Activity:** Promptly and accurately log the demonstration details, attendee information, notes, and next steps in the company's CRM system (e.g., Salesforce).
2. **Follow-Up Communication:** Send a follow-up email to the participants within 24 hours, thanking them for their time, recapping key discussion points, and providing any promised information or materials.
3. **Provide Feedback:** Share relevant feedback from the demonstration with the Product, Marketing, and Sales Enablement teams. This includes feature requests, common objections, and competitive insights.

5. Compliance

Adherence to this policy is mandatory for all individuals within its scope. Failure to comply may result in disciplinary action, up to and including termination of employment or contract.

- **Monitoring:** Department managers are responsible for ensuring their team members are aware of and comply with this policy. The Sales Enablement and IT Security teams may conduct periodic audits of demo recordings and demonstration environments to ensure compliance.

- **Violations:** Any violation of this policy, such as using the production environment or showing real customer data in a demo, is considered a serious security and compliance breach. All potential violations must be reported immediately to the employee's direct manager and the IT Security department.
- **Exceptions:** Any exception to this policy must be requested in writing and requires formal approval from both the relevant Department Head (e.g., VP of Sales) and the Chief Technology Officer (CTO) or Chief Information Security Officer (CISO).