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> **"Fear can drive short-term behavior, but it rarely builds long-term consistency."**

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TECHNOLOGY

How to Run a Structured Software Demo

Know what to ask, what to watch for, and how to score vendors objectively.

BY ADAM WYSOCKI

Most veterinary practices approach a software demo the same way: A calendar invite is accepted, a few team members get pulled into the office, and everyone spends an hour nodding along while a sales rep clicks through slides. The vendor controls the agenda and the pace. Somewhere around the 40-minute mark, someone asks about pricing, the rep says, "That depends," and the call wraps up with a follow-up email full of links nobody reads.

I've watched this happen dozens of times from both sides of the demo. I've also watched practices make expensive, multiyear software commitments based almost entirely on how much they liked the rep. The demo is where most of the leverage sits in any software selection, and most practices give it away before the meeting even starts.

This article focuses on practice information management systems, because selecting a new PIMS is the most consequential software decision a veterinary practice makes. But the same framework applies to every category of veterinary software you evaluate.

Do Your Homework

The demo shouldn't be treated as the start of your evaluation. It's a checkpoint in the middle. If you haven't done the work before you get on that call, you'll be watching a product tour instead of testing a solution for your practice.

Before you contact any vendor, write down your requirements — a prioritized breakdown of what your practice needs, organized by workflow. Look at your check-in, medical records, invoicing, lab integrations, reporting, and client communications, and ask yourself:

- Where does our current system fail us?
- Where does our team lose time?
- Where are we using a computer plus a paper log?

Use your list to evaluate every product you see. Evaluating six products in parallel causes fatigue, which leads to bad decisions. Research thoroughly to cap your list at three, then run a tight, controlled process. Create an ordered list of the workflows specific to your practice that you want to see. Don't let them walk you through theirs.

Build Your Scorecard Before the Demo

Creating a scorecard is the most important step you can take, and almost no one does it.

If you build your evaluation criteria after a product demo, your criteria will unconsciously reflect what you just watched. A vendor who spent 20 minutes on their reporting dashboard will make reporting feel important to you, even if reporting ranked sixth on your priority list. Scorecards that are scratched together after the demo become rationalizations, not evaluations.

Scorecard categories might include:

- Core clinical workflow
- Front desk and scheduling
- Reporting and analytics
- Support and training quality
- Implementation process
- Pricing transparency

Assign each category a weight based on what matters most to your practice. A three-doctor general practice with a complex lab workflow weighs integrations differently than a solo cat-only hospital.

Within each category, define what each score means. A five shouldn't just mean "great." A five on support means the vendor demonstrated documented service level agreements, named your implementation contact, and explained the escalation path for a critical system failure on a Monday morning. A three means they gave reassuring language but no specifics. One means they couldn't answer the question.

Defined scoring criteria force honest assessments and make your post-demo debrief far more useful.

Get the Right People in the Room

The owner or manager should not be the only person scoring a demo. The people who will use this software every day — your lead client service representative, a veterinarian, and a veterinary technician — need to be there, and their voices need to carry weight.

Assign roles before the meeting. One person runs the question list. Everyone else observes and scores independently. That independence matters: It neutralizes the "HiPPO effect" — the tendency for a group's evaluation to drift toward the opinion of the highest-paid person in the room. When scores are submitted individually before the group discusses, you get an honest signal, rather than consensus.

Limit the attendee count to four or five people. With more than six, the meeting becomes hard to manage and easy for the vendor to redirect.

Control the Agenda

Send your agenda to the vendor 48 to 72 hours before the demo. Don't ask if it works for them; tell them this is how you run evaluations. A vendor worth your business will appreciate the structure. One who pushes back is revealing how they'll behave once you're a client.

Here's a solid demo agenda:

1. Brief company and product overview (five minutes)
2. Scenario-based workflow walk-through (30 to 40 minutes)
3. Integrations and data questions (15 minutes)
4. Support and implementation deep dive (10 minutes)
5. Pricing walk-through (10 minutes)
6. Q&A (10 minutes)

The scenario-based walk-through is the most critical part. When left to their own devices, most vendors will spend the bulk of a demo on their newest or most visually impressive features, like the artificial intelligence-generated discharge summary or the analytics dashboard with the beautiful charts. Those may be useful, but they aren't what your team touches 50 times a day. What your staff lives inside — check-in, medical records, invoicing — are often less flashy and therefore less likely to be featured in a demo.

Taking control of the agenda is how you redirect that. Instead of asking the vendor to "show us your calendar," give them a specific situation and ask them to walk through it live. Something like: "A client calls to book a same-day appointment for a dog that is overdue on vaccines and has an outstanding balance. Walk me through everything from booking to checkout." That scenario exposes workflow logic, alert handling, client communication triggers, and payment processing in a single thread. A feature tour cannot do that.

One more rule: Require the vendor to demo in a realistic practice environment, not a pristine sandbox with three patients and zero historical data. If they can't demo with a reasonably populated dataset, that is worth noting.

The Questions Vendors Hope You Skip

Most practices ask product questions during demos, but process and policy questions will reveal the real nature of a vendor relationship. Here are the questions that matter the most:

- **Workflow and reliability:** What happens to an incomplete task if the original user doesn't finish it? How does the system behave when the internet drops? Is there offline capability, and what is accessible?
- **Integrations:** Which diagnostic lab integrations are bidirectional, meaning results flow back into the patient record automatically, not just orders flowing out? Ask this carefully.
- **Data ownership:** What data won't be included in an export if we leave your platform? Knowing what you can't take with you is as important as knowing what you can.
- **Support:** What is your documented service level agreement for a system-down event during clinic hours? What is your average response time on a high-priority ticket on a Monday morning? Can you show me that data rather than just describing it?
- **Implementation:** Who is my implementation contact, and what happens to my onboarding if that person leaves your company mid-project? What does the go-live day look like for a practice of our size?
- **Pricing:** What will this cost in year three, assuming 10% growth in patient volume? What specific actions trigger an overage charge? When, and by how much, were your last three price increases?

The answers to these questions are the minimum you should know before committing to a long-term contract.

Score and Compare

Within 30 minutes of each demo, every attendee submits their scorecard. Don't discuss scores first. Don't let one person anchor the group before everyone has committed their assessment.

After scores are in, debrief as a group. Surface disagreements explicitly; don't average them away. If your practice manager scored the client communication workflow a four and your lead CSR scored it a two, that gap is a data point. Find out what each person saw that the other missed.

Wait at least 24 hours before comparing vendors. Recency bias will inflate scores for the last vendor you saw. Deliberately delay comparisons to ensure every demo is scored fairly.

From Scores to a Decision

A scorecard is a decision-support tool, not a decision-making machine. If the scores between two vendors are close, that's usually a signal to request one follow-up deep dive — not a full second demo, but a focused 30-minute session on the specific module or question where confidence is lowest.

Use your documented evaluation in negotiations. A well-run, well-documented vendor evaluation gives you leverage. You can tell a vendor exactly where their score was weak and ask what they are willing to do about it.

When the scores are close enough that the scorecard alone cannot separate them, ask yourself one final question: Which vendor made us feel like a future partner rather than a signed contract? How a company behaves during the sales process — whether they answer hard questions directly, respect your time, and adapt to your agenda — tells you a great deal about how they will behave at 8 a.m. on a Tuesday when something breaks.

The Demo Is a Two-Way Audition

A structured demo process protects your practice from two of the most common mistakes in software selection: buying on feature impressions rather than fit, and choosing a vendor based on relationship chemistry rather than what you learned.

The vendors worth your business will welcome the structure. They will come prepared, answer your questions directly, and show you a realistic picture of what working together will look like. Those who push back, deflect, or try to steer you away from your agenda are giving you the most important demo of all: a preview of the support relationship you're signing up for. TVB

ADAM WYSOCKI is the founder of VetSoftwareHub, the largest independent vendor-neutral directory of veterinary practice software. With 35 years of SaaS experience and a decade focused on veterinary software, he is the author of The Veterinary Software Insider on LinkedIn and a book about PIMS selection.

DEMO RED FLAGS

Some of the most useful information in a demo has nothing to do with the product's features. Watch for these signals:

- **Roadmap deflection:** If a feature you need is "on the roadmap," ask when it ships, and get that commitment in writing. "We're working on it" without a date is not an answer.
- **Support questions that require escalation:** If the rep says, "I'll have to check with the team on that," when you ask about data export or service level agreement terms, that's a red flag. Those are not niche questions. A knowledgeable rep should own the answers.
- **Pressure tactics:** Limited-time pricing and "We only have a few implementation slots left before Q3" are sales tactics, not reasons to make a decision. Treat them accordingly.