

SaaS Demo Readiness Checklist & Scorecard

Check what's true today, score your process across eight dimensions, and find your readiness tier.

Part 1 · Readiness checklist

- ☐ Every demo request enters a defined workflow automatically
- ☐ Qualification criteria are documented and consistently applied
- ☐ Routing rules exist and don't depend on one person's memory
- ☐ Scheduling works without back-and-forth email chains
- ☐ Reps receive buyer context before the meeting, not during it
- ☐ Demo execution follows a repeatable structure with room to personalize
- ☐ Outcomes are logged with consistent definitions
- ☐ Follow-up tasks have clear owners and timing expectations
- ☐ Demo data connects to pipeline and revenue reporting
- ☐ The process can absorb a volume increase without proportional effort increase

Part 2 · Score each dimension (0–4)

Pts	What it means
0	Not defined
1	Mostly manual and inconsistent
2	Defined but inconsistent
3	Consistent and measurable
4	Scalable, appropriately automated

8 dimensions × 4 points each = 32 maximum

Dimension	Your score (0–4)
Capture	_____
Qualification	_____
Routing	_____
Scheduling	_____
Preparation	_____
Demo execution	_____
Follow-up	_____
Intelligence	_____
TOTAL	_____ / 32

Part 3 · Find your tier

0–8 · Reactive

No repeatable system; demos handled as they come.

9–16 · Developing

Some structure, but gaps show at normal volume.

17–24 · Operational

Works today; may strain under growth.

25–32 · Scale-ready

Absorbs volume without proportional effort.