

## ▶ BUILDING CAPACITY



Darryl Booth, MBA

## Building Capacity by Maximizing the Software Demo

**Editor's Note:** A need exists within environmental health agencies to increase their capacity to perform in an environment of diminishing resources. With limited resources and increasing demands, we need to seek new approaches to the business of environmental health. Acutely aware of these challenges, NEHA has initiated a partnership with Accela called Building Capacity—a joint effort to educate, reinforce, and build upon successes within the profession using technology to improve efficiency and extend the impact of environmental health agencies.

The *Journal* is pleased to publish this column from Accela that will provide readers with insight into the Building Capacity initiative, as well as be a conduit for fostering the capacity building of environmental health agencies across the country. The conclusions of this column are those of the author(s) and do not necessarily represent the views of NEHA.

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Like test driving a car along a pre-approved route or laying on a mattress under the fluorescent lights of a showroom, we are sometimes expected to make critically important recommendations with just a sliver of information. This experience can also occur in your office when your team joins a meeting in which a potential vendor demonstrates (demos) its software. Eventually you're asked, "What did you think?"

I've attended hundreds of such meetings and for the most part, all participants are keenly interested in matching a health department's needs to the product's capabilities. The demo is a "good one" when the features match

your needs and interest is raised. If the vendor can also spotlight some new sexy technology—the wow factor—even better.

We know intuitively and by experience that the software demo serves to set expectations and convey the promise of some possible future state. Perhaps that's fine but let's do even better!

### Before the Demo

Start by preparing the demonstrator. Let it be known what you want to focus and spend the most time on. Declare who will be in the room and their various interests. In your proposed demo outline or script, emphasize

the underlying business need and not the exact process.

It's very useful to share fee schedules, forms, workflow diagrams, and reports in advance. Please don't expect, however, a tailored presentation that shows exactly how the final system will be configured. That level of preparation can take weeks or months.

Applied evenly, such practices normalize competing software solutions.

Finally, confirm what environment you'll provide. An Internet connection and projection system (e.g., screen or large monitors) is normally expected.

A quick note on remote (web-based) demos. If the health department is in its decision-making phase, a face-to-face demo is appropriate. When the health department is just in discovery mode, feel free to suggest a remote demo. There are 2,500 health departments in the U.S. and face-to-face visits are not always practical or responsible options.

If your presenter is traveling to be with you in person, it's appropriate to share recommendations for travel and lodging.

### Commit to Prepare

If you're part of a selection committee, you've already studied and scored the vendor's written proposals. Those pages should be open and cross-referenced to the presenter's content. Follow along the script or outline.

Don't trust your memory and plan on taking notes. Notes might include follow-up questions, scores, and deliverables. For follow-up (and to avoid going off schedule), it's a good practice to designate a scribe. The scribe will capture follow-up items and details to be delivered after the meeting.

Visit the proposer's website and LinkedIn pages. Read a few relevant social media and blog posts. Get the flavor of the organization's values.

### Demo Day

If you are leading the demo, show your leadership by setting a productive tone before introductions. For example, leaders can start the demo by saying, "A product demonstration can be stress inducing. Let's agree that we're here today to learn through active listening and by asking intelligent questions. Some items will require follow up. That's okay as our scribe will capture those deliverables and share the notes with all in attendance."

Ask your presenter if the demo is live. Is the actual proposed software being used? If so, keep an eye on performance, keeping in mind that a good demo will use a fast computer with all the bells and whistles.

It should be acceptable for the presenter to explain that a certain suggested feature is not available. Overreaching engineering solutions on the fly should be avoided.

Also, it's okay for the health department to learn about alternate ways to conduct their business. Use your scribe to keep things moving along.

### In Closing

To the person giving the demo, I respectfully offer this counsel. Go slowly. Your audience has a hundred other responsibilities they've put on hold for your meeting. Give them each time to internalize what you are saying. Be prepared to go off script. It's so very powerful when the person at podium is clearly an expert.

Finally, always remember that we're all here to elevate the profession of environmental health in our shared mission to protect our communities. Have a great demo!



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### Software Demo Quick Lists

#### Proposer Information

- Areas of primary interest (e.g., outline or script)
- Audience, roles, and interests
- Samples of fee schedule, forms, workflow diagrams, reports, and website
- Remote or room configuration (e.g., Internet, projection, whiteboard, etc.)
- Travel/lodging recommendations

#### Preparation

- Written proposal/materials
- Website review
- Notes on questions, follow up, etc.
- Designate a scribe

#### Demo Day

- Set a productive tone
- Encourage probing questions/clarifications
- Designate a scribe
- Stay on schedule

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