Book a demo

Use these questions to qualify a demo request by phone or email. Score company size and timeline, then book the call if the score is 4 or more.

Questions marked * are required.

Completed by _____ Date _____

1 About you

Why we ask: So the right person takes the call and knows who they're talking to.

1. Full name *

_____

2. Work email *

_____

3. Company *

_____

4. Company size *

Tick one.

- ◯ Just me
- ◯ 2 to 10
- ◯ 11 to 50
- ◯ 51 to 200
- ◯ 201 to 1,000
- ◯ 1,000+

2 What you're looking for

Why we ask: So the demo covers your use case, not a generic tour.

5. What would you like to get done? *

The problem, and what good would look like

_____

_____

_____

_____

6. **What are you using today?**

Tick one.

- ◯ Spreadsheets
- ◯ Another tool
- ◯ Nothing yet
- ◯ Something else

7. **When are you hoping to start? ***

Tick one.

- ◯ This month
- ◯ In the next three months
- ◯ Later this year
- ◯ Just exploring

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3 Pick a time

Why we ask: So the call is on the calendar before you leave the page.

> **Choose a time that suits you. The booking tool emails you the invite.**

8. **Book your demo ***

Booking happens online. We will send you a link.

You're booked

Check your inbox for the invite. See you on the call.