Demo Podio
like a Pro

1. Preparation

Before giving a demonstration of Podio to your co-workers, you should get familiar with the product and it's capabilities.

To make the presentation relevant to your co-workers, set up two workspaces with a few apps that reflects some of your current work processes. This could be managing projects, sales recruitment or other.

See the App Store for inspiration, but remember to modify the apps to reflect the way you work.

After you've got the apps you want, go to the apps and click "modify app" to start customizing. You'll find a 2 minutes clip to get you started.

Add a few entries to the apps so you're sure the set up works for you and to make it easier to understand for your co-workers. Invite a few of them in to the spaces and assign some tasks to the them to make it more live and realistic.

2. Presentation

Before diving into the product itself, get the power point template and add your details to it.

This will give people an understanding of what Podio actually is and make it easier and more interesting to follow the demonstration.
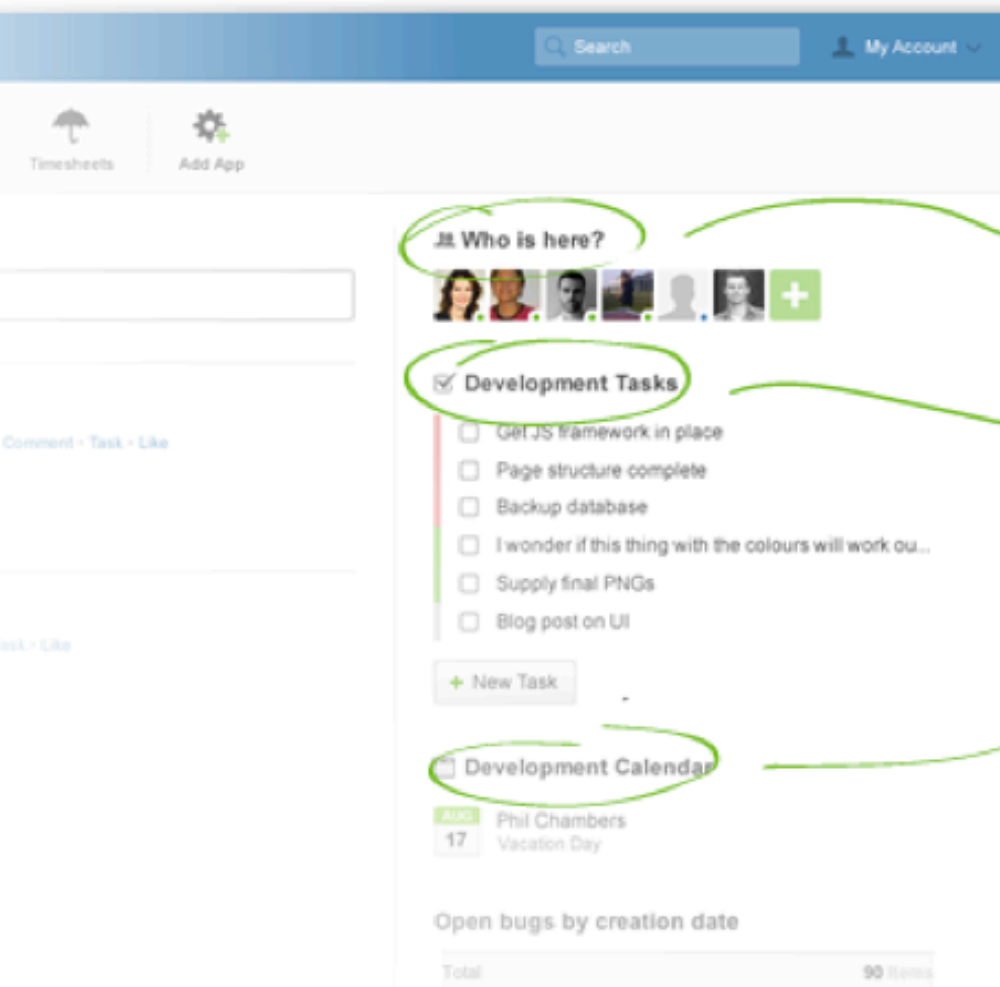
PODIO

Start with the activity stream.

"This is where you get an overview of the most recent interactions and updates across all your workspaces.

*In the **left hand side** you see the workspaces you are a member of and you can create new workspaces or look for open workspaces to join from here."*

See your personal activity stream

Your spaces are now here
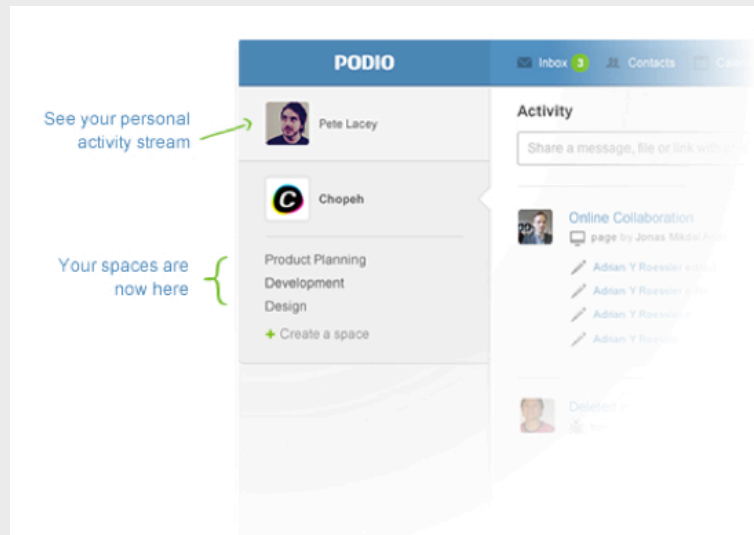
"In the right hand side you will see who else is online, your tasks and your calendar."

See your space members & contacts

See your space tasks

See your space calendar

PODIO

![medal icon] The blue navigation bar
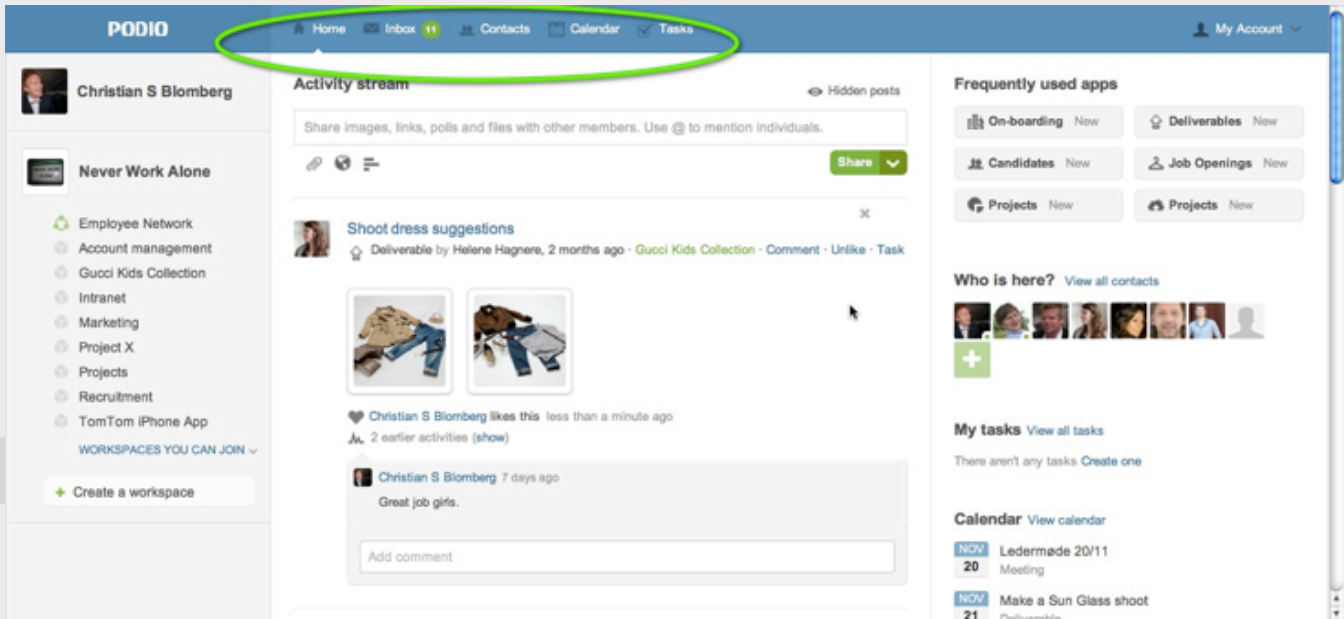
"The blue navigation bar in the top follows you everywhere you go in Podio and is your personal bar.

The inbox gathers everything that is specifically related to you: i.e. if someone assigns you a task, sends you a message or interacts on something you are subscribing to.

The "contacts" and "calendar" gathers all your contacts and calendar entries across all the workspaces you are involved in.

Under "tasks" you get a full overview of all your tasks as well as all the tasks you have assigned to others."

PODIO

Go to the employee network
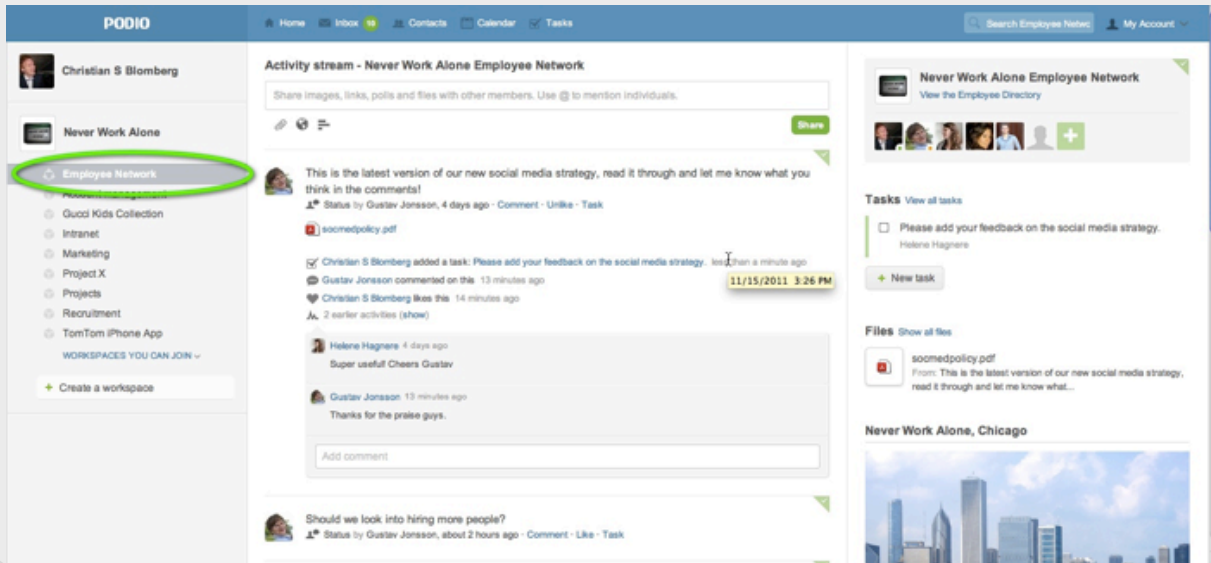
'"The employee network is a closed off space only for the people with an @ourcompany.com email address.

This is where to share company wide updates like "Good article about us in the Times today" with a link,

"Today we are releasing xx. Please inform your network", "Got this great feedback from a client today.." etc. So no more "CC-all emails!"

PODIO

Go to One of the workspaces you have set up.
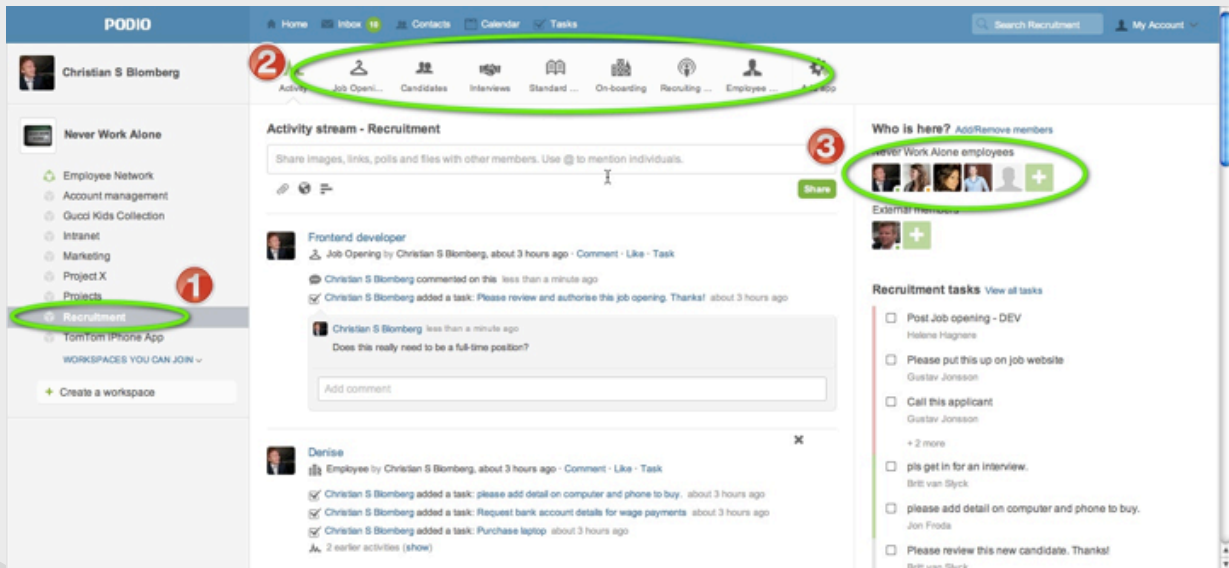
"This is where the real work takes place. We will set up workspaces to manage our Projects, Sales, Recruiting, Marketing etc., but for now I have focused on projects and recruiting.

As you can see, the space has it's own activity stream, showing the latest interactions in this specific space. Spaces are defined by three things:
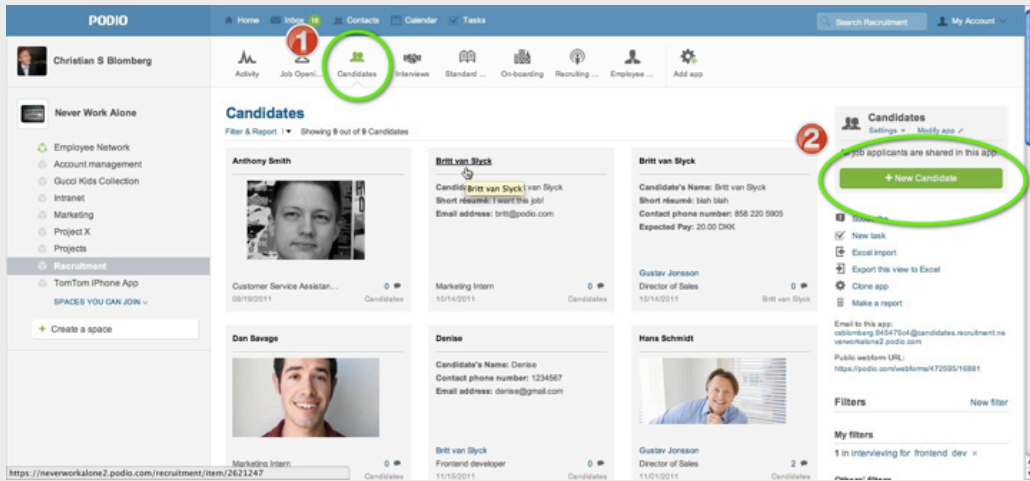
1: What are we working on? -Reflected in the name of the space.

2: Which tools are we using to get our work done? -The apps in the top bar.

3: And who are we working with? -As seen in the right hand side. (Access in Podio is based per space). Let's see the recruiting space."

PODIO

Show one of the **Apps** you've set-up and create a new **item**.

*"**Apps** are structures that bring together the relevant people, tasks, documents and data to accomplish the challenge at hand. This app I set up to manage our candidates.*

We can see a list of them here and I can click the green button in the right to create a new candidate."
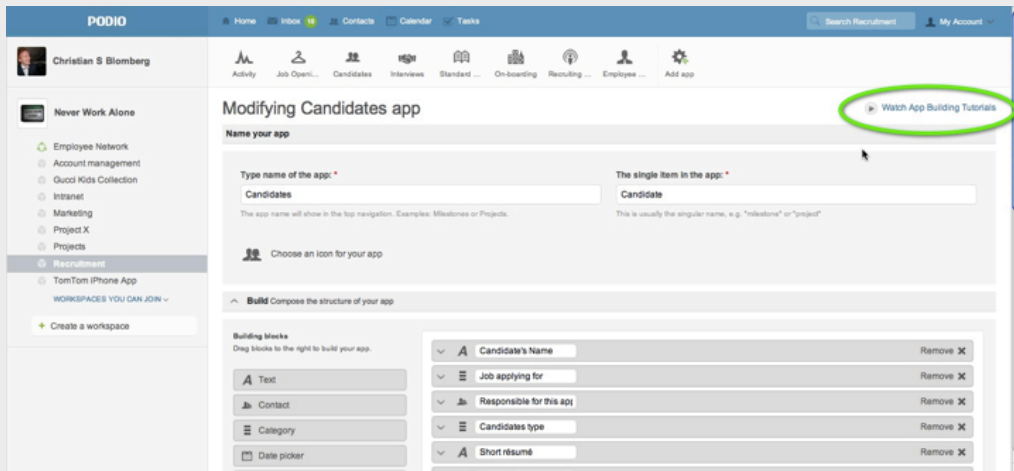
Click 'Modify app' in the right hand side

"In Podio we can easily modify any of the existing apps from their free app store, or build them ourselves to work exactly the way we want to. No technical skills are required."

PODIO
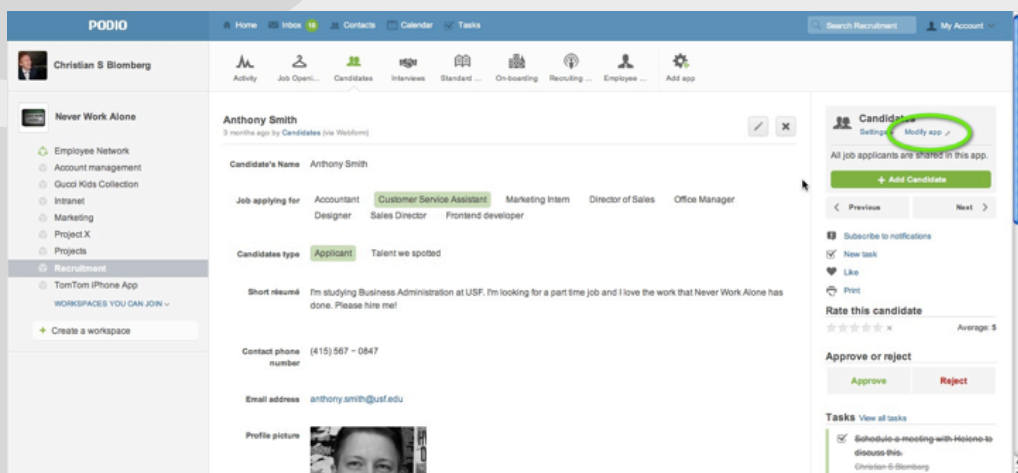
Click "**watch app building tutorials**" then scroll all the way down and click "save app".

"There are three short videos here explaining how to make the apps work the way you want. You can easily modify the apps to suit your specific work processes.

You can see the building blocks to the left and the current structure of this app to the right.

I'm pretty happy with this app the way it is though, so I'll leave it for now." **(Go to the item you just created).**

PODIO

Click **"new task"** in the right hand side and create a task for yourself.
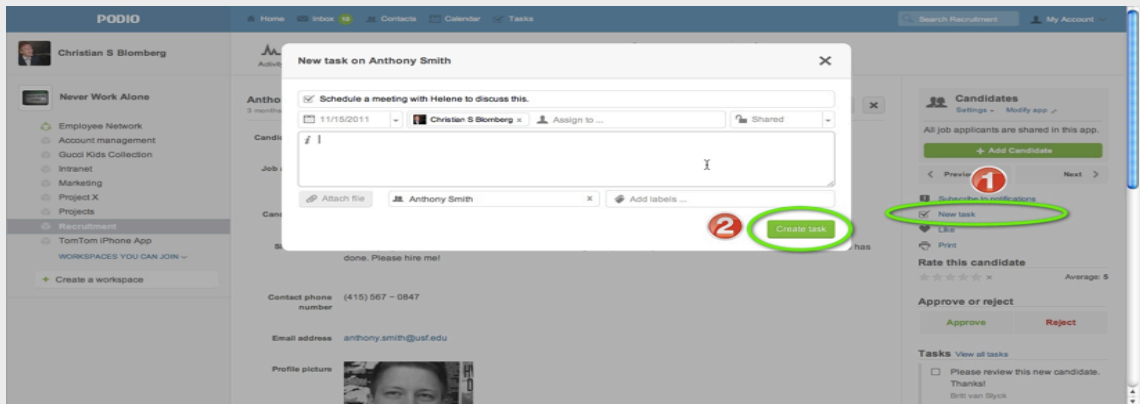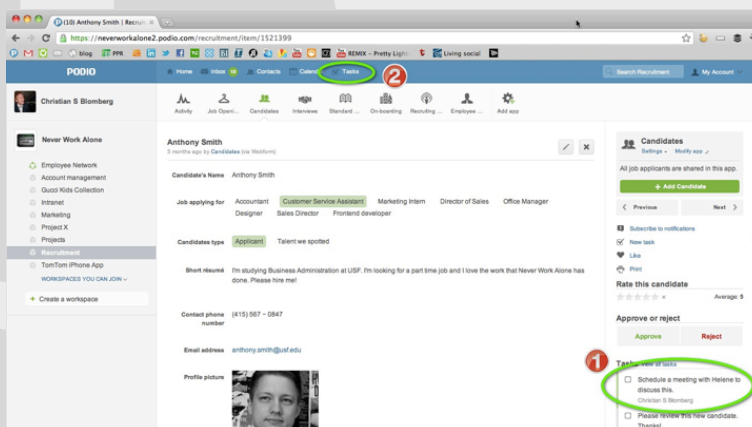

"Adding a task to the item I just created, I will remind myself or someone else to perform a task that is related to this.

I'll set the due date of the task for today and assign it to myself, reminding me to…"

Show that the task appears in the right hand side and click "tasks" in the top blue bar, find the task you just created.
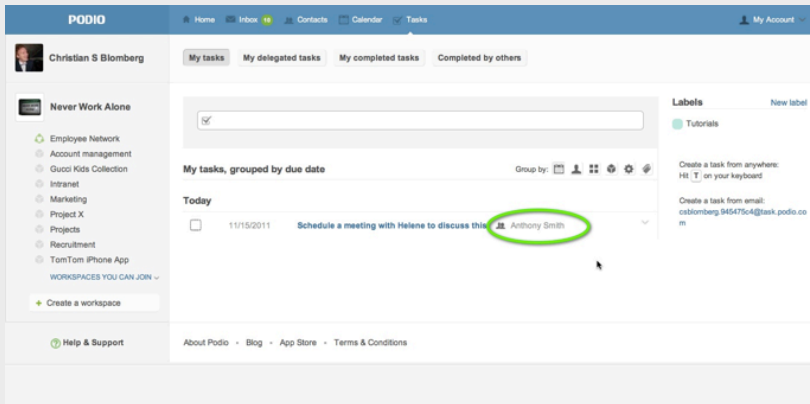

"Adding a task to the item I just created, I will remind myself or someone else to perform a task that is related to this.

I'll set the due date of the task for today and assign it to myself, reminding me to… I'll click on "tasks" in the top blue bar to go to my personal task overview."
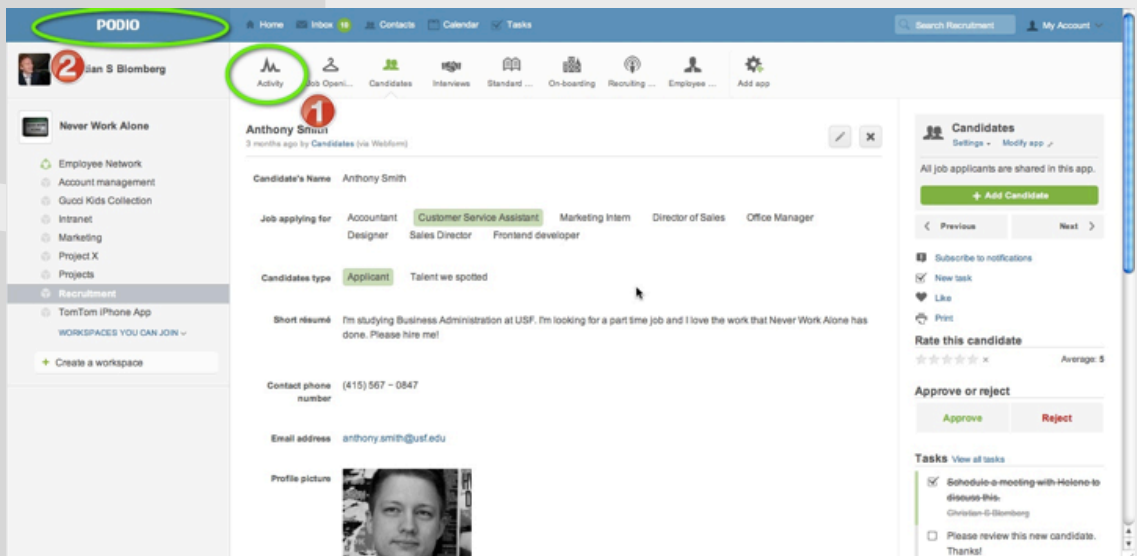
PODIO

Click the link back to the item you've just created

"Here I can get an overview of all my tasks and all the tasks delegated to others. Clicking the name of the item I just created here, it takes me back to the item. So the task management is connected to everything else and I don't have to look for the relevant information."

From the item, **1:** click "**activity**" button to show how this new item is now in the top of the activity stream in this space. **2:** Then click "**Podio**" in the top left corner to show that it's also in the top of the global activity stream.

"That was a very quick tour of Podio and some of its capabilities. Questions?"