

# SmallGroupOS Demo Guide

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**Audience:** Anyone demoing SmallGroupOS to a prospective parish, diocese, network, or partner. **Time budget:** 25 to 30 minutes total (20 minute demo + 10 minute Q&A and close). **Date written:** 2026-05-22

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## Part 1: Before the Demo

### 24 HOURS OUT

- Confirm the audience.** Solo youth minister at a small parish, DRE at a diocese, exec director of a YM network, donor, or influencer. The demo flexes differently for each. (See "Audience Variants" at the bottom.)
- Confirm the platform.** Zoom, Google Meet, in-person, or a phone screen share. Test the chosen tool the day before, not 5 minutes before.
- Send a calendar invite with a one-line agenda.** Example: "15-minute walkthrough of SmallGroupOS, 10 minutes for your questions, no slides."
- Look them up.** Their parish website, their LinkedIn, the diocese they sit under. Reference one specific thing about their context in the opening. People feel the difference.

### 30 MINUTES OUT

- Log in to the demo account.** Use <https://smallgroupos.com/login> with the dedicated demo super admin (see "Demo Credentials" in Part 5).
- Pre-load a Play session.** Have one game ready to launch instantly. Nothing kills momentum like clicking through to start a game.
- Pre-set the threshold stage on three students** so The Funnel and Threshold views look populated. Empty modules feel dead.
- Confirm the live status indicator** in the top status bar is green. (Smoke test: visit <https://smallgroupos.com> and confirm 200. The whole platform is hosted on one Cloudflare tunnel.)
- Close every browser tab not needed for the demo.** No Slack notifications, no client emails, no personal Gmail.
- Pour water.** Demos go off the rails when you cough.

### 5 MINUTES OUT

- Open three tabs in this order, left to right:**
  - <https://smallgroupos.com/app> (the SPA, on the Dashboard)

- <https://smallgroupos.com/app> (a second tab, ready to play the role of a Leader or Parent for the multi-user moments)
  - <https://smallgroupos.com/redeem> (in case they want to see the invite redemption flow)
- Close DevTools, hide the bookmarks bar, zoom to 100%.**
  - Take one slow breath.** This is the part you control.
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## Part 2: The Opening (90 seconds)

**Do NOT open with the product. Open with the problem they already know they have.**

Example opening, adapt to the audience:

"Before I show you anything, I want to say back to you what I think your week looks like, and you tell me if I'm wrong.

You probably use a spreadsheet for your roster. A group text or Remind for leaders. A Google Form for retreat signups. PayPal or Venmo for payments. Stickers in a binder for confirmation hours. And the only person who knows where any of it lives is you.

If that's roughly right, the next 15 minutes are about what we built so that you can stop being the one app that holds it all together."

Then transition with one line:

"I'm going to walk you through one week of one parish's ministry from the inside. We'll touch every module along the way, but the order is the order Jenny actually does her job."

Skip the feature tour. Skip the "we have nine modules." Tell the story.

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## Part 3: The Demo Story Arc (15 minutes)

The whole demo follows one persona, "Jenny," through one Wednesday. Each module shows up in context, not as a feature.

### MINUTE 0-2: TUESDAY AFTERNOON · DASHBOARD

**Click into:** `/app` (Dashboard)

Say:

"When Jenny logs in Tuesday afternoon to prep, this is what she sees. 87 students. 9 groups. 15 leaders. Last week's Play session had 23 students join."

Point at the recent-activity stream. Don't dwell. The dashboard is the entrance, not the destination.

Transition:

"Let's set up Wednesday night."

### MINUTE 2-4: SETUP · SMALL GROUPS

**Click into:** Small Groups module

Say:

"Jenny has nine groups. Each one has its own roster, leaders, and meeting rhythm. She can add a kid here, mark someone inactive there, and the change shows up everywhere this kid is referenced. One student, one record."

Do one tiny action: open a group, add a fake student named Mary O'Brien-Hernández. The non-English last name is intentional. It demonstrates that the app handles real names without breaking.

Transition:

"Wednesday at 6:55pm, five minutes before the first kid walks in, Jenny sends one Signal."

## MINUTE 4-6: PRE-NIGHT · SIGNALS

**Click into:** Signals module

Say:

"Signals are timed, group-aware messages for leaders during a night. Jenny sets up tonight's three: a kickoff at 7:00, a 'wrap your discussion' at 7:45, and a debrief reminder at 9:00."

Compose one Signal: "Wrap up your discussion. Large group starts in 5 minutes." Schedule it for 5 seconds from now so it actually fires on screen. Watching the leader's view receive it in the second tab is the moment.

Transition:

"7:00. Kids start arriving. Jenny opens Play."

## MINUTE 6-10: LIVE NIGHT · PLAY

**Click into:** Play module → Start Session

Show: - QR code prominent on the screen - Have them imagine scanning with a phone (or actually scan with a phone to demo if you have one) - Run a mood check ("How was your week, 1 to 5?") - Run a brain dump ("One word that describes Catholic school") - Show the leader dashboard updating in real time

Say:

"Everything you're seeing is being captured. Anonymous mood doesn't get tied to a name. Brain dump is searchable later. If you wanted to know two months from now whether sophomore boys were trending down on mood scores, you could."

End the Play session.

Transition:

"After the night, Jenny does the slow work."

## MINUTE 10-12: DISCIPLESHIP TRACKING · THRESHOLD + THE FUNNEL

**Click into:** Threshold

Say:

"This is based on Sherry Weddell's Five Thresholds. Each student sits in one stage. Jenny moves a kid forward when she sees real movement. The system tracks the date and reasoning for every move so a year from now she remembers why."

Move one student from Trust to Curiosity. Add a one-sentence note.

**Click into:** The Funnel

Say:

"Funnel uses ProjectYM's Reach, Feed, Send framework. Drag-and-drop. Jenny moves Mike from Reach to Feed because he came back a second week. That triggers a Parent Loop ping to Mike's family."

Drag a student between stages. Show the auto-suggested follow-up.

Transition:

"Sometimes a Wednesday isn't normal. Sometimes a kid pulls Jenny aside."

## MINUTE 12-14: THE HARD MOMENT · FLARE

**Click into:** Flare module

Say:

"Flare is the part nobody wants to need. When a teen discloses self-harm, abuse, or a family crisis, the youth minister freezes. Flare gives them a flowchart of what to do, who to call, and an encrypted place to write down what happened."

Don't run through it live. Just open the flowchart, scroll the local resources list, and show the incident form fields. This is a "we take this seriously" moment, not a feature demo.

Say:

"Diocesan safe environment officers love this. We built it with diocesan input."

Transition:

"Now let's talk about the part most platforms ignore. Parents."

## MINUTE 14-16: PARENT PARTNERSHIP LOOP

**Click into:** Parent Partnership Loop

Say:

"Most youth ministers see parents twice a year. Parent Partnership Loop changes that. Each new parent goes through a five-step onboarding journey by email. We delegate one parent per group as a Liaison, so when there are 12 parents to follow up with, Jenny isn't doing all 12."

Show: - The onboarding journey templates - A liaison assignment - A sample parent message

Transition:

"Resources. Quick one."

## MINUTE 16-17: DOCUMENTS

**Click into:** Documents

Say:

"Leader handbook, permission slip templates, the diocesan safe environment policy. Upload once. Share with specific roles. The system knows who's read what."

Point at a read-receipts column.

Transition:

"Last one. The thing that makes the books balance."

## MINUTE 17-19: FORMS

**Click into:** Forms

Say:

"Forms is registration plus payments plus reporting. Jenny builds a fall retreat form: student name, parent name, dietary restrictions, \$75 deposit. Drag-and-drop. Stripe is connected per parish, so the money goes straight to the parish's own account. We don't touch it."

Open one form. Click "View Submissions." Show: - Submitted entries - Auto-generated roster - Payment reconciliation - One-click ministry split report (if relevant to the audience)

Transition (and pivot to close):

"That's the whole thing. Nine modules, one student profile, one login. Built with parishes, not for them. Let me show you the last screen and then I'll stop talking."

## MINUTE 19-20: THE CLOSE SCREEN · PLATFORM USERS

**Click into:** Settings → Platform Users (the super admin view)

Say:

"This is what I see as a super admin. Every parish using SmallGroupOS, every user, who invited them. It tells me the platform is alive. Right now we're in invite-only beta with ten parishes. We're being very deliberate about who comes in early."

Pause. This is the natural setup for the pitch.

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## Part 4: The Close (3 to 5 minutes)

### STEP 1: NAME WHAT'S DIFFERENT

Say one of these depending on audience:

- **For solo youth ministers:** "You don't need another app. You need one app. That's what we are."
- **For DREs / coordinators:** "You don't get to choose between Planning Center for the office and a bunch of separate tools for youth. We do both in one place, designed for the relational work."
- **For dioceses:** "You can have a unified view across parishes for the first time. We give the diocesan office aggregate threshold and funnel data, individual parishes keep their own data sovereignty."
- **For networks / orgs (TENx10, NNYM, EQ Saints, ProjectYM):** "We can be the operating layer your network already wishes existed. Your endorsement gets the price reduced for your members and gets your logo on our site."

### STEP 2: NAME THE PRICE (DON'T DODGE)

"Pricing is four tiers. LAUNCH is free forever for one admin and four leaders. BUILD is \$39/month and unlocks unlimited admins and leaders. EQUIP is \$79. MULTIPLY is \$149. Most parishes start on BUILD."

If they wince at the price, do not flinch. Wait for them to speak. The wince is testing.

### STEP 3: NAME THE PATH IN

"We're invite-only right now. That means I'm not going to ask you to sign up at the end of this call. What I am going to ask is: if you want in, do you want me to send you an invite code? If you don't, do you want me to put you on the waitlist?"

**This is the close.** Two options. Both let them say yes.

### STEP 4: HAND THEM THE NEXT STEP

If they want a code: send one within an hour with a personalized note. Use the right tier for who they are (see Part 5).

If they want the waitlist: send them the link, send a short follow-up email recapping the demo, and add them to your CRM with a 30-day follow-up date.

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# Part 5: Reference Material

## DEMO CREDENTIALS

Don't use your personal super admin account for demos. It exposes real parish data and makes the demo feel chaotic.

**Recommendation:** create a dedicated demo account in a dedicated demo parish populated with realistic-looking fake data. Document the credentials internally, not in this file.

For now, until that's set up, use the new account you created today: - Email:

`jeffrey@theLopezfamily.org` - Password: `Sounding26!` - This is your live super admin. Switch into the smallGroupOS ministry for demos.

## INVITE CODE TIERS (PER MICHAEL'S FRAMEWORK)

Audience	Tier	Codes per holder	Use case
Diocese	DIOCESE	20	DRE or diocesan youth director gets a batch to distribute
Influencer	INFLUENCER	10	Speakers, writers, podcasters in YM space
Org Partner	ORG_PARTNER	10	TENx10, NNYM, ProjectYM, EQ Saints, etc.
Beta user	BETA_USER	10	Direct parish referrals from the launch cohort
New user (post-signup)	NEW_USER	3	Every parish that joins gets 3 to share

When you give a code, fill in **issued\_to\_name** (the inviter's name, e.g., "Jan at St. Thomas More") so the recipient can credit the source and so we can track which inviter drives the most signups.

## TEST CARDS FOR ANY STRIPE STEP IN THE DEMO

Card	Result
<code>4242 4242 4242 4242</code>	Success
<code>4000 0027 6000 3184</code>	3D Secure required
<code>4000 0000 0000 0002</code>	Declined

Any future expiration, any CVC, any ZIP.

### URLS

For	URL
Marketing site	<a href="https://smallgroupos.com">https://smallgroupos.com</a>
App login	<a href="https://smallgroupos.com/login">https://smallgroupos.com/login</a>
Invite redemption	<a href="https://smallgroupos.com/redeem">https://smallgroupos.com/redeem</a>
Waitlist	<a href="https://smallgroupos.com/waitlist">https://smallgroupos.com/waitlist</a>
Admin SPA (post-login)	<a href="https://smallgroupos.com/app">https://smallgroupos.com/app</a>

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## Part 6: Common Questions (and how to answer)

### "WE ALREADY USE PLANNING CENTER / REALM / PARISHSOFT."

"Great. Those are solid platforms for the office side, registration, weekly bulletins. We're not trying to replace them. We're trying to solve the layer they don't: the relational work of small group ministry. We integrate where it makes sense. Forms data can export to your existing system."

### "WE CAN'T AFFORD \$39 A MONTH."

"Tell me about your current setup. What are you paying for Planning Center, Constant Contact, Wufoo, your QR code generator, your video conferencing tool, your spreadsheet plugins? Most parishes I talk to are paying \$80 to \$150 a month across five tools to do worse than one tool can do."

(Note: this is for parishes that already pay for software. For a parish with literally \$0 budget, point them at the LAUNCH free tier instead of arguing.)

### "OUR PARISH IS TOO SMALL."

"LAUNCH is free forever for a parish under 20 students. There's no version of you being too small for us."

### "WHAT ABOUT YOUTH SAFETY / SAFEENVIRONMENT COMPLIANCE?"

"Flare module is built specifically for this. Encrypted incident docs. Diocesan resource directory. Audit trail. Designed with input from a diocesan SE officer. We can give your diocese a separate walkthrough of just that module if it would help."

## "WHAT IF IT DOESN'T WORK? WHAT IF YOU GO OUT OF BUSINESS?"

"Two things. One: your data is yours. Forms have full CSV export, students have full export, threshold history exports. You're never locked in. Two: we built this with our own money, we have ten beta parishes already, and we're growing slow on purpose. We're not VC-backed and not chasing hockey-stick growth. We're trying to outlast the parishes we serve."

## "WHO'S BEHIND THIS?"

"Two of us. Jeffrey Lopez built the platform. He's been in youth ministry for years and is the engineer. Michael Marchand runs ProjectYM, a Catholic youth ministry formation organization. We've been talking about this for a while. Now we're building it. We're in Texas and Pennsylvania, working with parishes from California to North Carolina."

## "IS THIS CATHOLIC-ONLY?"

"No. We built it cross-denominationally on purpose. Currently in beta with Catholic parishes and one Protestant youth network. Threshold uses Sherry Weddell's framework which is Catholic but works for any tradition that thinks about formation as a journey. Modules like Forms, Signals, Documents, Play are tradition-agnostic."

## "WHAT ABOUT AI?"

"We have no AI in the product right now and we're being slow about adding it. The work of forming a young person should not be outsourced to a model. We may eventually add AI assistance for things like draft parent letters or summarize a Play brain dump, but the relational work stays with the human."

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## Part 7: After the Demo

### WITHIN 1 HOUR

- Send a personalized follow-up email. Three lines: thank them, hand them the next step (code, waitlist link, or scheduled follow-up), include a calendly link in case they want a deeper dive on a specific module.
- Log the demo in your CRM / tracker (date, attendees, audience type, what landed, what didn't).

### WITHIN 24 HOURS

- Send any promised follow-up materials (one-pager, pricing comparison sheet, etc.).
- If they took a code, post a short note in your team channel so Michael / Jeffrey see the signup is incoming.

### WITHIN 7 DAYS

- If they took a code and have not redeemed: send one gentle nudge. "Wanted to make sure the code didn't get lost in your inbox."
  - If they're on the waitlist: skip until release.
  - If they ghosted: one warm checkin email, then move on. Demos that don't close are not failures, they're info.
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# Part 8: Demo Anti-Patterns

Mistakes to avoid:

Mistake	Why it kills the demo
<b>Opening with the product</b>	They tune out. Open with the problem.
<b>Showing every feature</b>	They drown. Show the story arc, mention features in context.
<b>Apologizing for "we're early"</b>	They lose confidence. Be matter-of-fact. "We're in beta with ten parishes" is a statement of fact, not an apology.
<b>Dodging the price</b>	They notice. State price flatly when asked. Wait.
<b>Asking "any questions?" at the end</b>	Silence. Instead ask "what part of what you saw would you most want to use this week?"
<b>Promising features that don't exist yet</b>	Future-you has to deliver. Be specific about what's live now.
<b>Showing the back-of-house mess</b>	Don't show empty modules, broken sample data, or your personal admin account. Pre-stage.
<b>Talking over their objection</b>	When they push back, stop talking, let them finish, then respond.
<b>Closing without a single next step</b>	If they walked away with no action, the demo didn't close. Either code or waitlist, every time.

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## Part 9: Audience Variants

The story arc above is the standard 20-minute demo. Adapt based on who's in the room:

### **FOR A SOLO YOUTH MINISTER (THE MOST COMMON CASE)**

Default arc. Lean into the "you're the one app that holds it all together" framing. Emphasize Signals, Play, Documents (their day-to-day pain points).

### **FOR A DRE OVERSEEING MULTIPLE PROGRAMS**

Add 2 minutes on multi-ministry support (when Phase B ships). Emphasize Parent Partnership Loop and The Funnel. Skip the Stripe-per-parish part since the parish owns the Stripe account, not them.

### **FOR A DIOCESAN OFFICE**

Spend the first 5 minutes on the aggregate parish view and threshold/funnel diocesan reporting (when Phase B ships). Spend less time on individual parish workflows. Lead with Flare for the SE officer.

### **FOR AN ORG PARTNER (NNYM, EQ SAINTS, PROJECTYM, TENX10, FULLER, YOUTH CARTEL)**

Skip half the modules. Spend more time on the partnership structure: discount codes for their network, logo on our site, revenue share model. The demo is the appetizer; the conversation is the entrée.

### **FOR A DONOR OR INVESTOR**

Spend less time on features, more on the why now, the unit economics, the cross-denominational moat. Show the platform briefly to make the business real, then sit back.

### **FOR A PODCAST / PRESS INTERVIEW**

Don't show the product at all. Talk about the verse, the partnership, the ten beta parishes, why now, what's hard. The product is the bonus track.

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## Part 10: After Your First 10 Demos

Update this guide. The first ten demos will teach you which questions actually come up, which transitions feel awkward, which features land, which fall flat. The version you write after 10 demos will be better than this one.

Build a "Greatest Hits" notes file: - What landed - What got the longest follow-up question - What got the longest silence - What needed to be cut

Every 10 demos, prune.