

SOLVE IT STORIES

TALES OF CUSTOMER SUCCESS
FROM OUR PARTNERS



Spekit

How Spekit helped Mariner Wealth Advisors spend 65% less time doing live Salesforce trainings.

The Challenge

Mariner Wealth Advisors partners with individuals and businesses to create financial strategies for the future. Since the company is growing rapidly and constantly onboarding newly acquired firms, it wanted to ensure that its national and largely remote teams all had the same technology infrastructure. Its main challenge was that less than 10% of its internal Salesforce processes were documented, making it nearly impossible to scale the onboarding and training of systems, including Salesforce. Salesforce is core to Mariner Wealth Advisors' business for client billing, trade requests and instructions, entering and maintaining client account data, and more. That is why the team was looking for an easy-to-use solution for users and admins to create quick content, update existing information, and communicate process changes.

The Opportunity

Businesses often need a way to easily deliver Salesforce documentation and training to their end users when and where they need it.

How do they ...

- Enable new employees to learn operational processes and policies, process improvements, and new data restrictions in Salesforce?
- Effectively scale and increase revenue?
- Create a library of Salesforce documentation, best practices, and detailed processes to be shared contextually to end users?



“I can't imagine our Salesforce without Spekit. We've onboarded so many new firms and associates in the last few years and we aren't slowing down. At first, I was a one-woman Salesforce training team. Spekit allowed me to reach out and share knowledge, best practices, process, and platform guidance across so many associates, across our geographically spread offices.”

LOGAN WIKOFF

Manager, Platform Management Training,
Mariner Wealth Advisors



In the case of Mariner Wealth Advisors, it needed to create a great experience for its wealth team, who service and support the company's clients. This would require training hundreds of new employees. The company was able to successfully achieve that with Spekit.



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The Successful Outcome

With the help of Spekit, a just-in-time learning platform, Mariner Wealth Advisors was able to develop a robust library of Salesforce documentation. The team now leverages Speks, bite-sized bits of embedded information, in Salesforce to share best practices and deliver product and process training to end users where and when they need it. Since implementing Spekit, employees are aware of the latest policies, and data hygiene in Salesforce has greatly improved. The team also uses Spekit Spotlights (timely, contextual popups used to communicate company announcements, change management, onboarding, etc.) to convey process changes across the organization. Spotlights can be customized by role, the end user's URL, and other variables to ensure people are only receiving the information relevant to them.

This has resulted in ...

- 20 new firms and approximately 250 associates onboarded to Salesforce from 2019 Q4 to present day, the majority of which were virtually onboarded during the pandemic.
- An increase from 36 to 78 offices since 2019.*
- 65% less time spent leading live/facilitated trainings and one-off walkthroughs.
- Over 400 Speks, with more content constantly being created to support new policies, processes, and data health.
- Two promotions in three years for Logan, in part due to Spekit helping her boost her own productivity and get others engaged with training content.

Considerations for customers looking to keep the employee experience top of mind while rolling out process changes include:

- **Develop a repeatable and documented change enablement process to reduce surprises and ease the friction of change.** Change management doesn't need to be a huge, cumbersome effort. A just-in-time learning approach to change enablement allows you to easily provide ongoing, bite-sized training and reinforcement throughout every size process change. With this more agile

"I rely on Spekit all the time. It has a wealth of information, the knowledge base keeps growing, and the Speks are always current. I often pop open the side bar even when doing procedures I'm familiar with, just to make sure I'm not skipping steps or missing any updates. The search feature and links always get me to where I need to be."

CAROLINE DONAHUE

Senior Client Service Associate,
Mariner Wealth Advisors

 **Mariner**
WEALTH ADVISORS

* Office count is accurate as of 10/2022.



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approach to change management, you can create easily consumable change enablement playbooks and process guides, as well as provide timely notifications to communicate change in context, when and where it will be most effective.

- **Create an “advisory board” of employees** who will not only serve as champions out in the field, but weigh in on new process design and implementations and provide real feedback to you. Ideally, this group of individuals involves a mix of high performers (employees that others look up to), very tenured employees (likely to hold the most resistance to change), and new employees (newer perspectives, more likely to adopt). Create incentives around this board, making it both an honor to be a member and providing perhaps some level of financial incentive for participating (quarterly gift card or something) or meeting with the CEO. The closer you are to the voice of your customer (your users), the more likely you are to be able to truly drive adoption.

[Learn more](#)

Learn more about Spekit for
Salesforce on AppExchange.

