Best Practices for Using Spekit for Change Management

Implementing a new technology? Rolling out new or updated processes? Look to your new best friend: change management.

Change management is an essential practice that enables your organization to mitigate the risks associated with change, plan and track progress, and create strategies for handling resistance.

Organizations that master change management thrive because their team can easily pivot, understand, and execute on evolving business needs and strategies. The alternative? Miss reaping the full potential of your investments in your people, processes, and technology.

So what makes change management so challenging?
• People have a natural resistance to change
• A lack of clear ownership over change management
• A disconnect between addressing micro and macro changes

These challenges result in common mistakes:
• Not establishing repeatable change management processes
• Providing poor communication and enablement on the change
• Never reinforcing information about the change

Spekit can help.

By making your documentation more agile and centralizing change management tactics, Spekit makes it easier to drive, communicate, and train on changes. This guide teaches you how to best use Spekit to support agile, consistent, and repeatable change management practices.

In this guide:
- How Spekit uniquely supports change management
- 12 ways to use Spekit for successful change management

Spekit
How Spekit uniquely supports change management

Spekit drives awareness, understanding, and ultimately adoption of change.

But how? Glad you asked!

Spekit empowers you with an agile, end-to-end change management workflow. We don’t see change management as a linear, isolated project.

We see it as a continuous cycle to improve performance by providing the right people with the right information at the right time via:

- Bite-sized training content and step-by-step guidance that’s easy to consume and manage
- Contextual delivery and reinforcement of knowledge
- Powerful analytics that help you measure understanding and optimize training
12 ways to use Spekit for successful change management

Ready to unlock the power of Spekit for change management?
To set your change management strategy—and yourself—up for success, check out these 12 best practices:

1. Identify processes and tactics you can streamline in Spekit.
2. Plan how Spekit will support different changes.
4. Design your Spekit org around your processes.
5. Assess the five Ws.
6. Use prebuilt content whenever possible.
7. Pick the best destination for push notifications.
8. Create feedback loops.
9. Answer every question with a Spek.
10. Reinforce changes with Knowledge Checks.
11. Track and review quantitative results.
12. Revisit and update content regularly.
Identify processes and tactics you can streamline in Spekit

There are so many disparate channels, materials, and locations that can be used to document, store, and share change management information.

This makes change management a challenge for everyone. It's hard to standardize processes for change management drivers, and employees don't know what to expect when changes occur, since the organization doesn't consistently share information in the same format or location.

To alleviate this challenge, consolidate tactics in Spekit. It's easier to establish consistent change management practices, and for employees to know what to expect and where to go for up-to-date change management information.

Check out the graphic for recommendations on how to streamline processes with Spekit.

PRO TIP

Change management is a team sport. When thinking through tactics, tap your stakeholders to make sure you captured everything and to get buy-in on new approaches.

Instead of... | Try...
--- | ---
Documenting changes in a Word or Google Doc | Documenting changes in one or more Speks
Storing documentation in a folder on your file sharing system | Organizing Speks with Topics
Sending a one-time email to notify users of a change | Sending a Spotlight to notify users of a change
Sending recurring email updates to communicate project status changes | Sending a notification after updating a dedicated project status Spek
Reviewing changes in a meeting with a presentation | Reviewing changes in a meeting by sharing your Speks in presentation mode
Creating a step-by-step job aid of process steps | Creating a Flow to walk users through process steps
Creating a long-form eLearning course that users consume all at once | Creating a Topic with associated Speks that users consume in bite-sized chunks
Plan how Spekit will support different changes

It’s a good idea to have a plan on how you’ll use Spekit to support change management. For small changes, you probably don’t need a dedicated Topic with several Speks and a Flow. But for large changes, you probably don’t want to simply send a browser notification after updating a Spek.

Be strategic. Make a list of the different types of change in your organization. Then map out which Spekit features make sense for your organization to use for each change.

We’re fans of breaking down changes by t-shirt sizes. Check out the graphic for our recommendations on using Spekit features for small, medium, large, and extra large changes.

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PRO TIP
To establish consistent processes across the business, document your chosen tactics in a Spek for each type of change.
Build repeatable processes

After you decide how you’ll consistently use Spekit for change management, you need to establish repeatable change management processes.

Templates are really helpful here. As an example, let’s take the small change we mapped out in the section above. To templatize this, you could:

- Create a Topic called “Change Management | Templates”
- Add a Spek to the Topic called “Change Management | Templates | Small Change”
- In the Spek, outline the format and information required
- Add a section to the Spek that advises users when and how to disseminate the information (Hint: Remind them to enable the browser notification when they publish their Spek.)

PRO TIP

Don’t only advise people when to communicate with employees. Also advise them when not to. We recommend avoiding Mondays, Fridays, afternoons, and end of quarter.
Design your Spekit org around your processes

Before experts start using your change management templates, make sure you set up your Spekit instance to support future changes.

If you follow our recommendations, you'll always create a new Topic for extra large changes, like new tool rollouts. But don't forget about smaller changes that don't require a new Topic. To keep these updates organized, create a Topic for each "category" of change.

For example, create a “Salesforce Updates” Topic. Add a Spek to it when employees need to know about a new small Salesforce change.

Designing your Spekit organization like this makes it easy for employees to identify the latest changes to your organization's tools, processes, and content.

PRO TIP

Create and follow a standard naming convention for change management content. This makes organizing updates easier and minimizes repeat questions from employees about finding information.
Assess the five Ws

Communication is critical for implementing and adopting a change successfully, but it’s often underwhelming. To make sure you thoroughly communicate changes, assess the five Ws:

- **Who** needs to know about this change?  
  Give the right teams access to your Spekit content.
- **What** role-specific information do they need about the change?  
  Communicate the need-to-know information.
- **When** do you need to make this information available?  
  Put specific timelines around your communication plan.
- **Where** will employees need this information?  
  Embed content in the relevant resources so it shows up contextually.
- **Why** is this change important?  
  Help employees understand the change’s impact.

**PRO TIP**

When explaining the “why,” focus on what’s in it for the employees:

- ✓ We added a new field to the Opportunity object called XYZ.  
  To ensure you are paid correctly and on-time, make sure to fill it out when converting a deal to “Closed Won.”
- ✗ On 12/1/21, we are adding XYZ field due to requirements from the finance team.
You know what you need to communicate, so now you’re ready to start creating content, right?

Not so fast.

Before you create something brand new, check Spekit’s out-of-the-box content. We offer customizable prebuilt training content for tool rollouts that you can upload and start using the same day. Use our prebuilt content as-is, or tweak it to meet your company’s specific needs. Either way, less time spent creating content from scratch = faster rollouts and more time for strategic initiatives.

PRO TIP

If prebuilt content isn’t an option for your rollout but you still need content support, let us know. We offer content creation services, whether you need entirely new content or have existing documentation you want to convert into Speks.
Pick the best destination for push notifications

Configure Spotlights (Spekit push notifications) to show up on “any URL” or a “specific URL” to notify the right people of changes relevant to them directly in their flow of work.

To make your Spotlight as effective as possible, make sure you select the best destination for it. Check out the graphic for recommendations.

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<thead>
<tr>
<th>Spotlight appears on...</th>
<th>Use for...</th>
<th>For example...</th>
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</thead>
<tbody>
<tr>
<td>Any URL</td>
<td>Critical communications</td>
<td>“X part of the product is down. Do not demo!”</td>
</tr>
<tr>
<td>Specific URL</td>
<td>Just-in-time reinforcement of process changes</td>
<td>Making a change to a process associated with a specific tool</td>
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**PRO TIP**

For changes that won’t impact users until they perform a specific task, send the Spotlight to that task’s URL versus the app’s general URL.

For example, if you make a change to how reps create a quote, send the Spotlight to `website.com/quote` instead of simply `website.com`. 
The change is live and employees have the resources you created for them. But, that doesn’t mean your job is done.

Effective change management depends on feedback. Do your employees understand the information you shared? Do they have questions that your materials don’t answer? If you don’t provide ways for employees to give feedback, you won’t know.

You can approach feedback loops in a few different ways:

- To quickly understand if content resonates, encourage employees to use a Spek’s emoji reactions.
- To get feedback on smaller changes, encourage employees to share questions through a Spek’s “ask an expert” feature.
- For large changes where you anticipate a lot of conversation across the business, set up a dedicated Slack or Teams channel, such as #SalesforceFAQ.

**PRO TIP**

If you create a Slack or Teams channel, don’t forget to pin the relevant Topic or Spek to the channel.
Answer every question with a Spek

Once questions start rolling in, make sure to answer them with Speks—don't spend your valuable time writing the same response over and over again.

Instead, share the link to a Spek, copy and paste a Spek's content into a message, or send a Spek directly in Slack.

Get a question you can't answer with a Spek? Not for long! Create a new Spek that uses the question as the title, and add your answer. This way, you only have to write an answer to a question once. Moving forward, simply send the Spek to anyone who asks the same question, reducing time and energy spent answering repetitive questions.

Making this a habit also reminds employees they should always #CheckItInSpekit before asking a question, so over time, you'll get fewer repetitive questions. Plus, answering questions with Speks helps you create a comprehensive, up-to-date knowledge base.
Reinforce changes with Knowledge Checks

By now, you feel confident that employees not only have the relevant information they need about the change, but also that they understand it. Huzzah!

Then a week goes by. And they forget.

Reinforcement is crucial for successful adoption of a change because it prompts employees to re-confirm that they understand the information. And by re-engaging with the information, they’re more likely to retain it.

Spekit’s Knowledge Checks are an easy way to reinforce information. They’re bite-sized assessments that help you:

- Understand the impact of training efforts and content
- Quickly assess learning progress
- Uncover insights into where employees need more training

PRO TIP
To boost engagement with a Knowledge Check, share it in a Spotlight.
Track and review quantitative results

Because you created feedback loops, you're already getting a sense of how employees are responding to the change. Most of that is through qualitative data. Let's talk about quantitative data.

Once your content is live, make sure you track engagement, understanding, and retention rates.

Key data points to review include:

- Spek views and reactions
- Spotlight views and snoozes
- Knowledge Check results

Don’t forget to review your Knowledge Check’s question-level analytics. If you see employees consistently getting the same question(s) wrong, they may need additional training or clarification in that area.
Revisit and update content regularly

Last but certainly not least: regularly revisit and update your Spekit content as needed. This not only ensures your content remains accurate and trustworthy, but it also helps you identify opportunities to optimize your content.

For example, maybe a few months after you roll out a change, you notice engagement rates with the associated Spekit content isn’t as high as you expected. Compare it to some of your more popular content. Are there differences that could be contributing to their popularity? If so, can you apply those characteristics to your underperforming content to give it a boost?

The more you do this, the more you’ll be able to refine and customize your change management approach and content to suit your business’ unique needs.

### PRO TIP

Easily identify content that may need a refresh by reviewing **stale vs. fresh** and **hot vs. cold** content in the Spek Management dashboard.

Learn more about Spekit for change management.