Spekit

The Future of Digital Adoption is Digital Enablement

How the best companies are creating impactful and empowered employees in the digital era.

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Digital Enablement is the Future of Workplace Learning

What employees needed was a platform that combined all the impactful building blocks of learning together to help them learn faster and work smarter.

Melanie Fellay

CEO & CO-FOUNDER AT SPEKIT

Spekit

We were a million dollars deep into a Salesforce implementation before anyone admitted there was a problem.

It was 2016, and I was working for RealtyShares, a real estate investment startup. We were coming off the back of a $20 million-dollar Series B round. Our team had ballooned from 15 to more than 150. Growth was good, but it created lots of new problems like leaky funnels and go-to-market process inefficiencies.

To shore up our sales strategy, our I.T. team rolled out a heavily customized Salesforce implementation. But even after a year of work and huge capital investment, adoption still hovered close to zero.

> *My CEO came to me and said, "We're burning money and resources. We're going to get rid of Salesforce. What are your thoughts?"*

At the time, I didn't know the first thing about Salesforce, but I could see their shining headquarters across the street from our office. I knew they were doing something right, and guessed the fault lay on our side.

I told my CEO that I could fix our implementation.

Little did I know, that decision would send me on a journey to reinvent corporate learning and define a brand new category now known as digital enablement.

But, getting there was a bumpy ride.

OUR APPROACH TO LEARNING IS BROKEN

After taking over the Salesforce project, I spent three weeks re-architecting and re-implementing the platform. I created a basic proof of concept and could demonstrate how my new Salesforce implementation would improve our sales motion.

But it didn't make a difference.

Reps understood the user interface and could use the product, but they struggled to understand the bigger picture. They didn't get our business processes and lacked the knowledge necessary to do their jobs.

When I looked at our training processes, I discovered the problem: we were delivering information in lengthy training sessions via PowerPoints. Even a cursory glance at the science of learning shows how our old approach would never really work.

People can only process an average of seven new pieces of information at once. If you present the eighth nugget of knowledge, the first piece drops away. We were running all-day workshops and presenting hundreds of pieces of information to employees. Worse, our sessions were one-size-fits-all. Even though people have different learning styles and preferences, every employee received the same presentation.

Our training methodologies weren't unusual—that's how most corporate training worked. So, it was no surprise when I learned that people forget an **average of 50% of the information** you present to them within one hour, and 90% of it within one week.

To shift information from short-term to long-term memory, people require repetition and reinforcement. You remember the lyrics to, "Twinkle, Twinkle, Little Star" because you've heard the simple lyrics hundreds of times before. Our employees forgot how to use Salesforce because we only told them once.

Looking back, re-architecting Salesforce was easy.

Re-inventing corporate training was the real challenge.

THE BUILDING BLOCKS TO LEARNING

At its core, our solution had a simple aim: make sure employees know what they need to know, when they need to know it, and where they need to know it. Through a six-month research project, I identified three categories of tools to help companies achieve that aim.

- **Learning management systems:** These platforms house, deliver and track training content.

- **Knowledge management solutions:** These repositories store all your institutional knowledge—policies, procedures, best practices, and so on.
- **Digital adoption platforms:** These tools help people learn how to use software, websites, and apps.

Each category was necessary to deliver training, but they weren't individually sufficient. For example, learning management platforms can assess employee understanding, but they can't help people navigate a product's user interface.

There were other problems as well. Learning management systems kept information locked away in slide decks and webinars. Knowledge management systems siloed knowledge from day-to-day tools. And, most digital adoption platforms required a dedicated engineering team to implement.

The more I learned about training tools, the more I realized how arbitrary the category distinctions were. If you could search within a tool, people called it a "knowledge base." If you could assess employees, people termed it a "learning management system." The category distinctions made sense for businesses, but not for employees.

What employees needed was a platform that combined all the impactful building blocks of learning together to help them learn faster and work smarter.

BUILDING DIGITAL ENABLEMENT

My colleague—and future co-founder—Zari Zahra and I became obsessed with learning. We attended every business operations conference within a thousand miles, interrogated enablement teams, and interviewed hundreds of individual contributors. We ran surveys, crunched data, and re-imagined learning in the workplace.

We learned why existing products failed and what teams needed to be successful. With that knowledge, we engineered the idea of **digital enablement:** something that unifies digital adoption, just-in-time enablement, and in-app communication. Digital enablement merges the best of the three legacy product categories and cuts away their faults.

We took inspiration from the consumer technology revolution, too.

Our personal feeds across social platforms or Google searches are uniquely personalized, bite-sized, and hyper-relevant. The way we learn and access knowledge at work needs to be just as simple.

We discarded protracted training courses and rebuilt training as an always-on contextual partner. The modern worker needs continuous, bite-sized reinforcement of training and enablement. That's exactly what we gave them.

During our research, we encountered countless other businesses making the **exact same mistakes as RealityShares**. PowerPoint—a tool invented in 1987 and barely updated since—remains the most-used training tool across the world. WebEx—a platform that came on the market in 1995—isn't far behind. It was frustrating.

But with our new digital enablement technology, we knew it didn't have to be that way. Zari and I took the ideas we had developed and created Spekit, the first digital enablement platform.

As business leaders, there's so much that's out of our control. If a sales rep loses a deal because their decision-maker didn't get enough budget, that's out of our hands. But, if a rep loses a deal because they couldn't find the right objection handling tips or competitive talking points, that's on us.

We can repeat and reinforce ideas until they're as familiar as "Twinkle, Twinkle, Little Star." We can cut away all the time they waste looking for information or waiting for support on Slack. We can integrate information and knowledge where they work. We can help them learn faster and work smarter. Often, that foundation is the difference between success and failure—and digital enablement is how you get there.

CHAPTER 2

How We Rebuilt Training When Our Headcount Tripled

If you only train employees on functional processes—how to use a particular app, for example—you teach them what to do, but not why they should do it. To drive long-lasting change, employees should understand why they're doing something and how it ties into broader company processes and strategies.

Ann-Renee Thrash

TRAINING AND DOCUMENTATION SPECIALIST

JLL

In the fall of 2018, I accepted a new Salesforce training and documentation role within JLL Technologies. I'd been with the company for several years, and knew the business well. With around 200 Salesforce users, it was tight-knit and mature.

An upcoming organizational transformation was about to push the organization out of its comfort zone and into a period of breakneck growth—a move that would triple our Salesforce user base.

We knew our current training processes couldn't cope with that sort of growth. The clock was ticking to overhaul our processes and systems before our first cohort of new users arrived.

RETHINKING TRAINING FOR SCALE

Before the transformation, JLL Technologies relied on traditional training tactics like classroom sessions and webinars. We would run live sessions and upload the recordings for people to access later. We also had PDF reference guides, pitch decks, and presentations. It was basic and rudimentary.

We had a cohort of seasoned Salesforce users, most of whom had been using the product for several years. If users had an issue or needed training, they could meet one-on-one with one of those super users, a team trainer, or even a support team member to clear things up.

But the organizational transformation posed a whole new challenge. We were expecting several hundred new employees in the New Year, the majority of whom were not only new to JLL, but to the technology we used.

Along with my team, I resolved to rebuild JLL Technologies' Salesforce training processes to support its next phase of growth.

We proceduralized everything and created a formal training approach. New employees would go through onboarding, specialized role training, and refresher sessions. We also shifted away from solely synchronous classroom sessions. Instead, we delivered universal training via asynchronous online learning and used face-to-face time to deliver highly personalized or customized sessions.

Although our new training regime still utilized human trainers like me, it wasn't reliant on us. We could scale from single-person hiring intakes to one hundred-person cohorts without also hiring an army of training specialists.

Most corporate training aims to develop employees to a minimum competency. But our enforced redesign provided an opportunity to do something different. We began thinking about how we could support employees continuously, helping them evolve in their use of Salesforce.

INTEGRATING DIGITAL ADOPTION

To make training an ongoing process, we implemented a new learning tool within Salesforce, called Spekit. It acts as a layer within Salesforce, allowing employees to access knowledge, processes and resources without ever leaving the workflow they're in. It sounds simple, but that immediate access to information is lacking from most training programs. Digital adoption drove two significant benefits to our training regime.

First, it accelerated everything.

People learn through repetition. Ordinarily, that repetition comes from repeated in-person sessions or self-practice. But with digital adoption, we could reinforce live training after the fact and even introduce new materials and ideas. It also enhanced the onboarding experience because it felt like a trainer was always there to support employees.

Because we had a solid base of reliable training content, this significantly reduced reliance on human support. If an employee wanted to check or clarify something, they didn't have to wait for a trainer to become available. They could access answers instantly with Spekit embedded across every workflow. It also meant our people stopped going to unreliable sources. Instead of resorting to Google, they could instantly access answers within our knowledge base.

The second benefit went beyond specific skills and competencies.

If you only train employees on functional processes—how to use a particular app, for example—you teach them what to do, but not why they should do it. Say I tell someone to fill out a particular form or follow a rigid process; it's entirely reasonable for them to think, "Why do we even use this form? What purpose does this process serve internally?"

To drive long-lasting change, employees should understand why they're doing something and how it ties into broader company processes and strategies.

We encourage people to seek answers for themselves and give them the tools to do so. Using Spekit, they can connect the dots and discover how their work supports their colleagues and the broader organization.

As JLL Technologies progressed through its organizational transformation, communicating the bigger picture became more and more important. We were moving quickly and changing a lot—both on a strategic and day-to-day level. That had a downstream impact on people's work. What they did yesterday wasn't necessarily what we were asking them to do tomorrow.

Spekit allowed us to communicate the reasoning behind updates in real-time. It helped us explain that this wasn't change for change's sake. We were adapting, evolving, and growing.

FROM 200 TO 600 TO 1,300

JLL Technologies didn't stop growing. Today, our Salesforce user count is more than 1,300. With an old, outdated training program, such rapid growth would have terrified me—but not anymore.

We've built a consistent and scalable training strategy that can grow alongside our business. Thanks to our focus on digital adoption and partnership with Spekit, our training isn't just for brand new employees. It's ongoing and always-on. We're not just helping people get to grips with technology, we're helping them master it.

CHAPTER 3

Embracing Digital Enablement as the Future of Revenue Enablement

Using Spekit means we can now deliver information right when the rep needs it, reducing retraining requirements and driving a much higher return-on-effort from my enablement team.

Whitney Seick

SR. DIRECTOR OF REVENUE ENABLEMENT AT OUTREACH.IO

Outreach

Subconsciously, I've been preparing for my role at Outreach for my entire life.

Back when I was a sales leader, I loved training. It was super rewarding to watch someone learn a new skill, apply it in the real world, and reap the rewards. It was a part of my job that didn't feel like work.

I loved training so much that I sidestepped out of sales *management* and into sales enablement. I honed my skills in a handful of roles, learning how to build impactful and scalable onboarding and training programs.

After 10 years in the industry, the opportunity every enablement professional dreams of appeared on my radar: Sales Engagement Platform, Outreach, was looking for a senior enablement leader. The role was helping sales reps sell sales software to other salespeople.

It felt like the pinnacle of my career. I accepted their offer and moved across the country to meet my new team.

RIDE THE ROCKETSHIP

There's a popular idiom in Silicon Valley: "You've got to build the plane while you're flying." In other words, you're building the company while it's operating and growing. But a *plane* doesn't do justice to the circumstances here. Outreach felt like a rocketship. It was scaling so quickly that people were just trying to hold it together while building new components to keep up with the rapid pace of innovation.

To make matters even more challenging, the company had gone without an enablement leader for around 18 months. (Although, I will say my predecessors had cultivated a strong learning culture. I inherited a team that already craved enablement, which is often one of the toughest challenges.)

While the existing enablement team was working hard, they didn't have anyone setting the direction or driving things forward. For example, employee onboarding had shrunk to keep up with the rate of hiring. Sales technology adoption was low, too.

Cross-functional collaboration was another casualty.

Suffice to say, there was quite a bit of enablement debt.

REBUILDING THE LAUNCHPAD

I spent my first six months rebuilding the enablement foundations—the *launchpad*, if you will.

I began with our technology. Adoption among reps had slipped over the years, which in hindsight was entirely understandable. Outreach had doubled its revenue every year since 2014 and its reps were working flat out to keep up. It wasn't as if they could hit pause on their sales and spend a week relearning our enablement tools.

But this provided an opportunity. Instead of rebuilding trust, interest, and engagement in the old, unused tool, I saw this as a chance to introduce something new and update our tech stack. And that's precisely what I did. Although it caused some minor disruption to the reps using the old technology, it was easier to generate widespread enthusiasm around a brand new launch.

My second significant project was to kickstart cross-functional cooperation. I drove a shift from enablement owning only *deliverables* to our team owning *outcomes*. For example, we no longer own onboarding because it's a complex process with dozens of different stakeholders involved in the process. But we own the *strategy*. We guide onboarding design to increase engagement, boost learning, and decrease ramp time.

It felt like we accomplished two years' worth of work in just six months. But fixing the launchpad was just the beginning. I was gearing up to transform the entire enablement function.

GO FOR LIFTOFF

Enablement professionals are often incredibly organized and detail-oriented. They seek out information from a variety of different sources. They build engaging learning tracks. They use work back schedules to work out what content to share and when.

In an ideal world, that works perfectly. But the reality is often imperfect and non-linear.

Consider a rep moving through a typical onboarding process. After a couple of weeks of basics, their trainer moves on to specific process work like building quotes. But here's the problem: That rep won't have to build a quote until months later when they're actually doing their job. By that point, they'll have forgotten how to put everything together. To relearn the process, they'll have to join a new cohort's onboarding session or we'll have to carve out separate time for one-to-one learning. Both options are highly inefficient.

This problem plagues enablement professionals all across the world. Or, at least, it *did*.

It feels like we're at the start of a new era of learning and development. One of the tools I introduced was a digital enablement platform called Spekit. With Spekit, we're equipping sales enablement to cope with different learning styles and competing factors people have in their life. This allows us to embed training content *within* the tool a rep is using, empowering them to learn on their own.

Think back to the rep who was struggling to build a quote. Instead of waiting for a training session, they can now access the training content directly from Salesforce and relearn it on their own and in their moment of need.

After I got the launchpad to a point where I was happy with it, I refocused on Spekit. I partnered with revenue operations to craft our most important training content and workflows in the platform and rolled it out to our sales reps. We used Spekit for new use cases—new stages, new pricing, and packaging processes—which helped our training investments make it onto the front line.

Using Spekit means we can now deliver information right when the rep needs it, reducing retraining requirements and driving a much higher return-on-effort from my enablement team.

STANDARDIZING OUR TRAINING PROCESS

We have an incredibly robust tech stack, but I'm embarrassed to say that we train on each piece of technology very differently. That creates a really inconsistent experience for the learner. After seeing the success of Spekit in supporting our enablement initiatives, I'm hopeful we can roll it out across the company to make learning consistent and concise.

I don't see enablement owning this entirely. Other owners can pick up the tool and use it on their own. They can produce content, training, and enablement in a way that's comfortable for them. For example, a rev ops leader could enact their quoting process change without relying on me or my team. They can feel more comfortable doing that themselves because we're no longer this blocker.

Augmenting sales enablement with Spekit was like a proof of concept. Now, I'm hugely excited to see what the whole company can do with it.

CHAPTER 4

The Change Management Strategy Behind NorthMarq's Transformation

Failure to innovate is one of the most significant business challenges facing CEOs. Yet, 70% of all change initiatives fail. Learn how NorthMarq drives digital transformation by reinventing the way people work, changing their experiences, and altering mindsets.

Dan Ritch

SVP OF TECHNOLOGY & INNOVATION
AT NORTHMARQ

NORTHMARQ

You can buy a Bluetooth-enabled coffee cup that keeps your brew at the perfect temperature. You can access your entire work-life anywhere in the world via a smartphone. You can track down long-lost childhood friends on the other side of the world through social media.

The consumerization of IT is everywhere—*almost.*

It turns out that commercial real estate financing hasn't kept pace with the wider economy. It's analog, unconnected, and generally dated.

Although NorthMarq was an industry frontrunner, renowned for its corporate ethics, strong workforce, and innovative services, it was no different when it came to digital transformation. They were missing a digital edge; the ability to transform ideas into amazing new processes, tools, or systems.

But the company's leadership wanted change. They were watching other companies reinvent themselves for the digital era and realized the opportunity available to them.

When I joined NorthMarq as SVP of Technology and Innovation, it was under the clear instruction to drive digital transformation and turn the company into a digital leader in the marketplace.

LAY THE FOUNDATION

Digital transformation is a nebulous concept. Ask a dozen companies what it means and you'll get a dozen different definitions. At NorthMarq, it's simple: Our long-term vision focuses on improving the experience of our customers. We start with the goal and work backward.

When I arrived at the company, I assessed our foundation: our people, platform, and processes. While we had great assets across the three categories, I knew we weren't yet in a place to drive a wide-reaching digital transformation. So starting in late-2019, I began shoring up our foundations.

I restructured the team and brought in players who could drive an Agile mentality. I hired product owners for our three internal products: Salesforce, Enterprise! and Automation. They each owned their product and drove progress from ideation through to adoption. Behind the scenes, I also hired leaders in Application Services and Infrastructure Operations. They're our back-office engine, keepers of all things sacred to technology and ensuring we're adequately equipped to do our jobs.

My next focus was our platforms. We created platforms for our two spheres of work: our front-end and our back-end. That way, we're all talking about the same language. We also built a new data model. We are working to pull data from our two internal platforms and integrate it with third-party data sources to add information on customers, building owners, rent rates, and so on. Combined, we created a 360-degree view of our customers.

Last, I turned my attention to our process. We mapped out NorthMarq's entire process from stem to stern. Never before had the company had a high-level view of how everything worked—the value chain, the departments, the processes, the stakeholders. Once we had an exhaustive visualization, we identified the pain points. And from that, we decided what we were going to work on.

Getting our people, platforms, and processes in place was a long and involved transformation. Every day, it was tempting to rush ahead and dive into the endgame. But we didn't. We stayed the course, and focused on our foundations. Now, after more than a year and a half of groundwork, we're finally starting to reap the rewards.

PREPARE FOR THE LONG-HAUL

It took until August 2020 until we shipped our first major product. It was Enterprise!, a loan servicing platform. This "platform" also consisted of a document management system/workflow via DocuSign CLM, an internally built Financial Statement tool and a borrower portal built within the Salesforce Community Cloud. When I arrived at NorthMarq, it had been in development hell for three and a half years. We identified it as a major pain point in the company's process and prioritized its development. We pushed hard for 11 months and got it to market.

Enterprise was a sort of proof of concept for the digital transformation. For several months, we'd worked behind the scenes, building the team, developing platforms, and analyzing processes. Although we'd staged many victories along the way, this was the first major launch we could point to as the fruit of our labor.

Its launch was the first moment of real credibility. It showed what we can do and prepared people for all the amazing things we've got in the pipeline. But it also hammered home how important communication and change management was to creating a lasting mindset. Building new technology was almost the easy part. Getting humans to use it was the challenge.

COMMUNICATE THE HECK OUT OF EVERYTHING

To win over hearts and minds, we had to communicate at three levels: individual, team, and organization. All three have the same theme, but they're different types of communication.

To communicate across the three levels, we relied on a battery of channels, campaigns, and strategies.

Our Tech Tuesday update goes out every other Tuesday, come rain or shine. It's a consistent feed of everything that's going on. Because we have this unbreakable communication schedule, nothing arrives by surprise. We announce, preview, and launch every new development in separate updates.

We also spun up roadshows. We went from team to team, training employees on what we needed them to do. It was face-to-face and personable. Although Tech Tuesdays had me in a presenting role, our roadshows really were all about the team. We were speaking live to small groups or individuals. We were answering questions and providing detailed instructions. Although the pandemic forced us to pivot to virtual roadshows, We are in the midst of planning a six-week roadshow and look forward to being face-to-face (safely).

Finally, we integrated a digital enablement tool, Spekit, as a sort of digital companion.

We think of it as our swivel chair replacement. That's a reference to someone getting stuck on something in the office and swiveling their chair to ask a colleague for help. But instead of physically swiveling, they can use Spekit to instantly get help, wherever they are.

Let's say I need to know how to enter a customer contact into Salesforce. I just go into Salesforce, and Spekit visually walks me through the process. Considering how much we're changing, having always-on reinforcement, directly within our employee's workflow, is invaluable.

A LEADER IN THE MARKETPLACE

If I'm being honest, some of our competitors got out of the blocks faster than we did. They're a little ahead of us in certain areas of digital transformation. But we're a quick study. Our goal is to outpace and outlast them all.

With all the work we've done in the past couple of years, we have a clear roadmap to achieve that goal and take our place as a leader in the marketplace. We're reinventing the way people work, changing their experiences, and altering mindsets. We're driving the world of commercial real estate financing into the digital era.

CHAPTER 5

Building a Pandemic-Proof Onboarding Process for Southwest Airlines

Employees forget 50 percent of the information presented in a training session within one hour. Learn how Southwest Airlines leverages the best of in-person and virtual to create efficient, effective, and engaging onboarding programs that drive retention.

Kara Factor

SR. SPECIALIST, TRAINING
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Southwest

I remember walking into Southwest Airlines' headquarters on my first day. There was a red carpet running through the main door and music blaring from every speaker. Hundreds of existing employees had come down to the atrium, and they cheered us in. My jaw hit the floor. It was *amazing.*

I later learned that this is everyone's first experience at Southwest Airlines—whether you're a pilot, ground crew, or a customer relations representative like me. It's just the beginning of a world-class onboarding program that supports people from their very first day all through their career at the airline.

Although I didn't know it at the time, my career would take me behind the scenes of the airline's onboarding program. There, I would help shape the wider learning and development processes for a brand new business unit: Southwest Business.

A STARTUP INSIDE A COMPANY

Like many new Southwest employees, I got my start in customer relations. I was on the frontlines, answering customer queries and solving problems. I learned a lot about the business and rose through the ranks quickly—from representative to senior representative, to specialist. In the last of those three roles, I took on training responsibilities and helped create a training curriculum for special technology projects.

As it turned out, I was good at it. When Southwest Airlines launched a new business unit focused on corporate travelers, I joined them to run the sales training programs. I had to develop materials for all new hires *and* content for ongoing training. Along with a small team, I led the implementation and weighed in at a strategic level, helping design the long-term training roadmap.

But this experience was significantly different from life in the customer relations sphere. Southwest Business felt like a startup. It was constantly growing, evolving, and pivoting. Month to month, things were different. Year to year, they were unrecognizable.

Running a training program amidst this change was immensely challenging. After all, how can you design an onboarding program when you don't know what your organization will look like in six months?

I relied heavily on our experienced senior leadership. We briefed them on the current state of Southwest Business and asked them to share their knowledge with new employees. They had decades of experience and could adapt their training sessions on the fly. It was the perfect solution to a changeable environment.

There was just one problem: It wasn't scalable.

There was a finite number of times I could call on our VPs to help out. They were busy people with packed schedules.

I knew we needed to replicate their impact *without* their presence. We began capturing what our senior leaders were doing. We documented everything and adapted it into a digestible, scalable onboarding format that we could repeat on our own.

BUILDING A FLEXIBLE ONBOARDING PROGRAM

Our onboarding program has two layers: company-wide and departmental.

The company-wide onboarding is all about setting the foundation and introducing the Southwest Culture, and that starts with our welcome. We want to welcome new employees in the true Southwest fashion. So no matter what someone's new job is or where it's based, we fly them out to our headquarters in Dallas, Texas. They walk along the same red carpet I did with hundreds of people all cheering all around them.

For the rest of that day, the focus is on Southwest more broadly: the company's history, mission, vision and operations.

After we've set that foundation, we divide people into their departments and layer on department-specific onboarding programs. That's where we take over for Southwest Business. We get them set up with technology, introduce them to their team, and give them a sense of their role and how the department operates.

We're careful not to overload them early on. Our philosophy is to build up knowledge and skills gradually, slowly layering on pieces of someone's day-to-day work on top of their foundational knowledge.

We take advantage of the flipped classroom model by sending people home with self-study materials. We let them know the content we're going to cover the following week and leave them to read and digest it on their own.

The next week, we bring people back and start building skills and knowledge. We work in short, sharp sessions of no more than one hour, and cover the material issued the week before. So we're layering knowledge *and* repeating it. They study at home, and we're recapping in the classroom. We have a couple of additional reinforcement tactics, like mentoring and one-to-ones, as well. Throughout onboarding, no one ever learns something just once. We teach, repeat, and reinforce.

At the six-week mark, we switch from foundational knowledge to higher-level skills: storytelling, presentation skills, negotiation, among others. We knew these ideas would overwhelm people on day one, so we delayed them until later in the onboarding process, after fundamental knowledge is cemented. As before, we reinforce everything at multiple points—at home, in the classroom, and with a mentor or a leader.

As we're repeating ideas, knowledge, and skills, people become more confident, assured, and capable. Session by session, they turn from fresh-faced new hires into hotshot sales reps.

EMBRACING THE FUTURE OF LEARNING

Our training and onboarding team is lean. It's just me and my boss. That puts huge demands on our time, especially when a new hire class has recently joined. No matter how good training materials are, people will always have questions, and they rely on other people for answers. In the past, we've leaned heavily on human trainers to handle these queries—but not anymore.

We introduced Spekit, a digital enablement tool, as our third teammate. It's an always-on overlay for our tools, allowing employees to access training content on their own. Frequently, someone will forget how to fill in a particular form or field in Salesforce. Before Spekit, they would have asked me for help, and I may end up answering the same question 10 times a day. Now, they can access a pre-recorded walkthrough *within* Salesforce. It's the help they need, when they need it, in their workflow. It's accessible, scalable and located right where it's needed.

Although we see huge potential in Spekit, we've implemented it with intentional care. Instead of overloading it with all of our training material, we use it to communicate small snippets of information, like the justification behind a new field or how to use a new form. Our goal is to use Spekit to connect the dots between tasks and outcomes, helping employees understand the why behind their work.

MOVING FORWARD THROUGH COVID-19

The COVID-19 pandemic disrupted a lot of our work. The airline industry shut down, our hiring plans crashed to a halt, and in-person training became unfeasible. But we adapted, learned, and improved. As the world returns to normal, I'm excited to see where our onboarding strategies go.

We're likely not getting back to in-person only training for a while. But the emergence of hybrid presents a real opportunity. By leveraging the best of in-person and virtual, we can create efficient, effective, and engaging onboarding programs. And it's tools like Spekit that are going to get us there.

CHAPTER 6

Cultivating an Always-on Learning Culture with Digital Enablement

We designed our digital enablement strategy with Spekit to reclaim wasted time. If reps aren't having to hunt for information, they can focus on what they're good at—building relationships with carriers.

Amy Contreras

HEAD OF LEARNING, ENGAGEMENT, & DEVELOPMENT AT UBER FREIGHT

Uber Freight

When I joined Uber Freight, everything was chaotic—in the best possible way.

It was April 2018 and the business unit was just one year old. We were trying to stand up a brand business in a huge, messy market. Our days were filled with new challenges and fresh opportunities. Regardless of our backgrounds, everyone was expected to think and act like a generalist. If you saw a problem, you went and fixed it—even if it wasn't technically *your* problem.

Before I arrived, Uber Freight relied on one fabulous trainer: Christina. Her entire work life was dedicated to onboarding new employees and getting people in their seats as quickly as possible. The business was growing so quickly that she was sometimes onboarding a new cohort every single day of the week.

My arrival doubled our learning and development capacity. With space to breathe, we got to work building a best-in-class onboarding system buoyed by a robust digital enablement strategy.

WELCOME TO FREIGHTVERSITY

Within my first year, we established Freightversity, our flagship onboarding program. It's a one-week experience that every single new hire goes through, regardless of their tenure, experience, or position.

Our goal with the program was to help our employees understand four things:

1. **Why Uber Freight exists.**
2. **The role we play in the industry.**
3. **The role we play within Uber.**
4. **How our mission serves the User's mission.**

We achieve those aims through inspirational and engaging talks, sessions, and workshops.

On day one, we'll give people a big welcome and get them set up on tools, technology, and services. We'll also dive in and start talking about Uber Freight as a company: How do we see the transportation industry? How do we see our business? Who are our customers?

This stage is universal, so we have technical and non-technical folk sitting alongside each other. It's a great opportunity for knowledge sharing and relationship building.

Once people have a grasp of the high-level concepts, we focus on Uber Freight. What does it mean to work here? What are the different teams? How do they interact with each other? Through the week, we'll introduce people to our culture, our products, and a range of teams.

Finally, we bring in a suite of guest speakers—executives, superstar employees, and external stakeholders. Their job is to tie everything together. They explain how the work we do drives Uber Freight's mission, and how everything we do is guided by our company values (or as we call them, "Freightisms").

It's a whirlwind week, and it's just the beginning of onboarding.

DIVIDE AND CONQUER

In the second week, people graduate from Freightversity and head into smaller onboarding flows, depending on their line of business. One example is our carrier sales organization. (This is the team calling carriers and encouraging them to sign up to our app.)

Employees within the carrier team enter a second week-long onboarding process. It's a blend of instructor-led sessions and self-study work. At this stage of the onboarding process, we're getting much deeper into specific day-to-day responsibilities, knowledge, and skills.

Say we're onboarding a new sales rep into the carrier organization. We'll share their OKRs, the goals that we're going to hold them accountable to. We'll familiarize them with the product they're going to be selling. We'll get them comfortable with our sales methodology.

Where possible, we reinforce training content by allowing employees to actually *do* the work. Practically, this means having new hires shadow existing employees. We also run regular assessment-based check-ins. These allow employees to prove that they know enough for us to release them onto the floor.

You might be thinking that this is a lot for an employee to absorb—and you'd be right. This is where our complimentary digital enablement strategy comes in.

DRINKING FROM THE FIREHOSE

A new hire at Uber Freight has to learn anywhere up to 30 different tools. The reality is: It doesn't matter how much we let an employee get their hands dirty. They are never going to retain enough information to be competent on every one of them.

For example, say a rep learns how to balance a load in their first couple of weeks at Uber Freight. Conceivably, it could be two or three months before they have to perform that task in the real world. By then, they'll almost certainly have forgotten what to do. That's the reality of learning and development.

In the past, the rep would have to dig through our knowledge base, hunting for an elusive deck where a trainer demoed the load balancing process. But our digital enablement process offers an alternative. Using Spekit, our digital enablement tool, the rep can access training materials from within the service they're using. They just click on the learning hotspot and Spekit provides a walkthrough, or links off to the related training material.

We designed our digital enablement strategy with Spekit to reclaim wasted time. If reps aren't having to hunt for information, they can focus on what they're good at—building relationships with carriers.

But digital enablement goes further than just reinforcing skills.

While Uber Freight is now an established organization in this logistics space, we're still evolving at a breakneck pace. There's a lot for our people to keep up with. We launch new products weekly, if not *daily.* We expect our reps to understand these products and how to sell them.

Then there are functional changes in our tooling. If we tweak a process or alter a user interface, that affects hundreds of employees. While there might be a really good reason for the change, it will disrupt our employees' work.

Change isn't going to stop. It's not even going to slow down. Indeed, with the COVID-19 pandemic and the work-from-home revolution, change is more prolific than ever.

Before the pandemic, leaders could walk through the office and ask employees if they were coping with change. They could field questions and offer reassurances. But in our remote-first world, that's not an option.

I see Spekit as a critical resource in our change management lifecycle. It provides an always-on channel for education and information. It allows us to connect the dots and explain the *why* behind changes, launches, and pivots.

DRINKING FROM THE FIREHOSE

Freightversity and role-specific onboarding take no more than a few weeks. But we know that effective onboarding takes longer than that. It's like trying to drink from a firehose of knowledge. Sure, you might be able to chug a couple of sips, but gallons of water will shoot right past you.

Our onboarding integration program extends our involvement beyond these first two workflows. The program runs through the full first year of an employee's lifecycle. We drip new knowledge, reinforce existing content, and push people to keep developing. Getting employees to a point where they are fully operational in their role feels like the end—but for us, it's just the beginning.

CHAPTER 7

Justifying your digital enablement investment

I cut my teeth at a large legacy insurance company, starting in claims before sidestepping into marketing, sales, and training.

Eric Smith

SENIOR MANAGER OF TRAINING
AT HIPPO INSURANCE

Hippo

I cut my teeth at a large legacy insurance company, starting in claims before sidestepping into marketing, sales, and training. My work was rewarding and interesting—I was there for almost 12 years. But all the while, something was nagging at the back of my mind.

When working at a large company, sometimes your voice can be lost in the noise. "Big Swing" ideas are pushed aside for the safer alternative. When an opportunity arose to join Hippo in 2019—an Insurtech company bent on transforming the home insurance sector into the digital era with an inherent focus on what's best for the customer—I knew I had to take it.

BUILDING THE LEARNING AND DEVELOPMENT ORG

When it comes to building a learning team, the challenges are the same for all of us. We want to build a world-class organization with engaging content, innovative learning tech, and flawless facilitation. The reality is that there are new hires to train, processes to document, and endless hours of prep to get everything where it needs to be.

In the tech sector or a startup environment, a relentless pace like this is all too common. So how can we as Learning Leaders deal with companies that are changing quickly, but growing to a state where formal learning is vital? The first place to start is with a plan—a learning and development transformation roadmap. The way I explain this master plan is with concentric circles. The nice-to-haves live on the outer ring. Our serious, but not time-sensitive, challenges live in the middle circle. And the core contains our most pressing concern.

But, wait. How do you know what the most pressing concern is?

Here's how. Spend your first few weeks touring the company—not with just leaders, but EVERYONE. Listen to calls, shadow an engineer, attend staff meetings. Embed yourself in the business and soon you will see where there are learning challenges. Maybe the issue is change management and the focus should be on existing employees; maybe it's an influx of new employees and on-the-job training is suffering from the volume. If you listen and observe enough, you will see the issues and add them to the plan.

Now that you have discovered the “what,” you need to determine the “how.” Ask yourself: “What would I do if my dishwasher broke, or your car started making a funky sound?” My first stop would be YouTube, where I’d search for DIY fixes. Failing that, I might check the manufacturer’s knowledge base. In most cases, we need a solution that mirrors our learners’ personal lives. Something that replicates that self-service education in the workplace.

> *Solutions like Spekit can help solve this problem by giving you a searchable knowledge database—a Wikipedia for your company.*

Solutions like Spekit can help solve this problem by giving you a searchable knowledge database—a Wikipedia for your company. When an employee hits a problem, they jump on Spekit and ask their question. The tool automatically searches through all your content and returns the answer. You can take all the tribal training and knowledge and formalize it into an effective program. After a few months, you can have a bona fide learning and development organization—but that’s not all.

WINNING OVER THE C-SUITE

Tracking the Return on investment for training has always been a challenge, but it’s now easier than it ever was before. By tracking ramp time improvements, for example, decreasing ramp time from five months to three, you can demonstrate the impact of your onboarding program. The same is true for quota fulfillment for customer support. Generally, we have all the data we need to draw a line between our initiatives and improved business performance. The issue is being in the meeting, getting the reports, and having a seat at the table to get that data. Even when we do have all the data we need, building a business case for learning needs more than just stats.

The average executive is highly intelligent and experienced. They pick up things quickly, and have unrivaled knowledge about your business and industry. Say you suggest a month-long onboarding program for new sales reps. An executive might wonder why new hires need a full month of training when they managed to jump straight in when they first started years before.

To win over hearts *and* minds, we have to be really good storytellers. We have to understand our learners and tell their stories at the highest level.

Recently, we made a change to some of our industry knowledge training. At a meeting with a Sales leader, I said, “Let me tell you about one of our new hires, Rishi. He wasn’t from the insurance industry, but he had all these great transferable skills and a desire to learn. We built up his industry knowledge through this new learning program and now he’s crushing it.”

That's a great story that demonstrates the need for a particular training program. It’ll resonate with all leaders, regardless of their experience, background, or feelings on learning and development.

Once we’ve earned that buy-in at the top, we can parlay it into a powerful strategic voice.

STRIVING FOR A STRATEGIC VOICE

Over the years, many departments have slipped into purely functional roles. Think about customer service, logistics, or accounting. In many companies, learning and development is one of these “functional” business units—and I believe that’s a huge missed opportunity.

Ultimately, my goal isn’t to encourage executives to buy into the value of a new onboarding program, it’s to have them get behind a long-term learning culture. I don’t want training to be the first two weeks of someone’s time at a company. I want training to be part of everything we do. Because that’s the way it should be.

Spekit