

Mariner Wealth Advisors saves “an immeasurable amount of time training and driving adoption” with Spekit

Spekit gives Mariner Wealth Advisors a flexible, scalable, modern approach to digital training that combines adoption and enablement to empower employees with answers at their fingertips.



Mariner

+1,000

EMPLOYEES

Financial Services

INDUSTRY

marinerwealthadvisors.com

WEBSITE



THE CHALLENGE

How to train a dispersed and growing team on new technology like Salesforce while **maintaining productivity and reducing the burden on support?**



THE OUTCOME

Spekit gives Mariner Wealth Advisors a **flexible, scalable, modern approach to digital training** that combines adoption and enablement to empower employees with answers at their fingertips.

“Being able to use and guide people to relevant content has saved an immeasurable amount of employee time, energy and bandwidth.”



Logan Wikoff
TRAINING ASSOCIATE,
MARINER WEALTH ADVISORS
★★★★★

Investing in digital transformation means investing in training

Before implementing Spekit, there was, “no formal or standardized training in place for new hires. We also needed a solution in support of a major initiative – migrating users in ten offices (spread across the US) onto Salesforce but lacked documentation and what we did have was scattered,” said Logan Wikoff, Training Associate, at [Mariner Wealth Advisors](#).

Companies across the [Financial Services sector](#) suffer from these challenges. With growth comes the expectation to improve operational efficiency, time-to-market, introduce new product streams and more, all while meeting customer expectations.

Yet, for all of the digital transformation goals, employees are still expected to learn 2020 technologies while being trained using the same technology that existed a decade ago.

Mariner Wealth Advisors recognized that successfully introducing new technology meant they needed a modern solution that could keep up with today’s rapidly changing work environments and their rapid rate of growth.

Spekit for ease of use, flexibility, insight and support

For Mariner Wealth Advisors, Spekit checked off all the boxes.

“Spekit was the only solution that would allow us to easily support frequent changes (and the training that comes with those changes) without slowing us down. Other vendors (including WhatFix and WalkMe) would have required a lot of initial programming and general maintenance on our part to ensure workflows would not break regularly for users,” said Logan.

Since implementing, the Mariner Wealth Advisor team has been able to:

- ✓ Provide training support and system-wide adoption for Salesforce
- ✓ Eliminate repetitive questions by making training and resources instantly accessible, at their employee’s fingertips
- ✓ Foster a “self-service” mindset where team members can easily search and find answers themselves
- ✓ Create consistency in training, where everyone has the same understanding of how our system works and the underlying processes
- ✓ Consolidate knowledge and documentation not only for Salesforce but for tools across the Mariner tech stack

“From the start, Spekit was willing and able to support us in any way they could. They helped get our content plan together and provided guidance to ensure it was helpful and useful to our users. This support has been non-stop, even now post roll-out.



Logan Wikoff
TRAINING ASSOCIATE,
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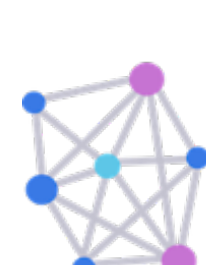
Saving an immeasurable amount of time with Spekit

- No more, “where is that resource?”
- No more, “how do I do that?”
- No more, “what’s the process for...?”

Scaling training and technology adoption with Spekit across their entire tech stack

While the initial goal was to help onboard and train employees on Salesforce, Mariner Wealth Advisors is expanding to actively build out content for Orion, their Portfolio Management System, and are also partnering with HR to develop content for ADP to support all employees during open-enrollment, when requesting time-off, and more.

“In any opportunity we can, we’re looking to expand and direct folks to Spekit where they can reference and share content that addresses their questions, outlines processes, etc. It’s all about continuing to foster the self-service mindset and further user adoption across the organization,” said Logan.



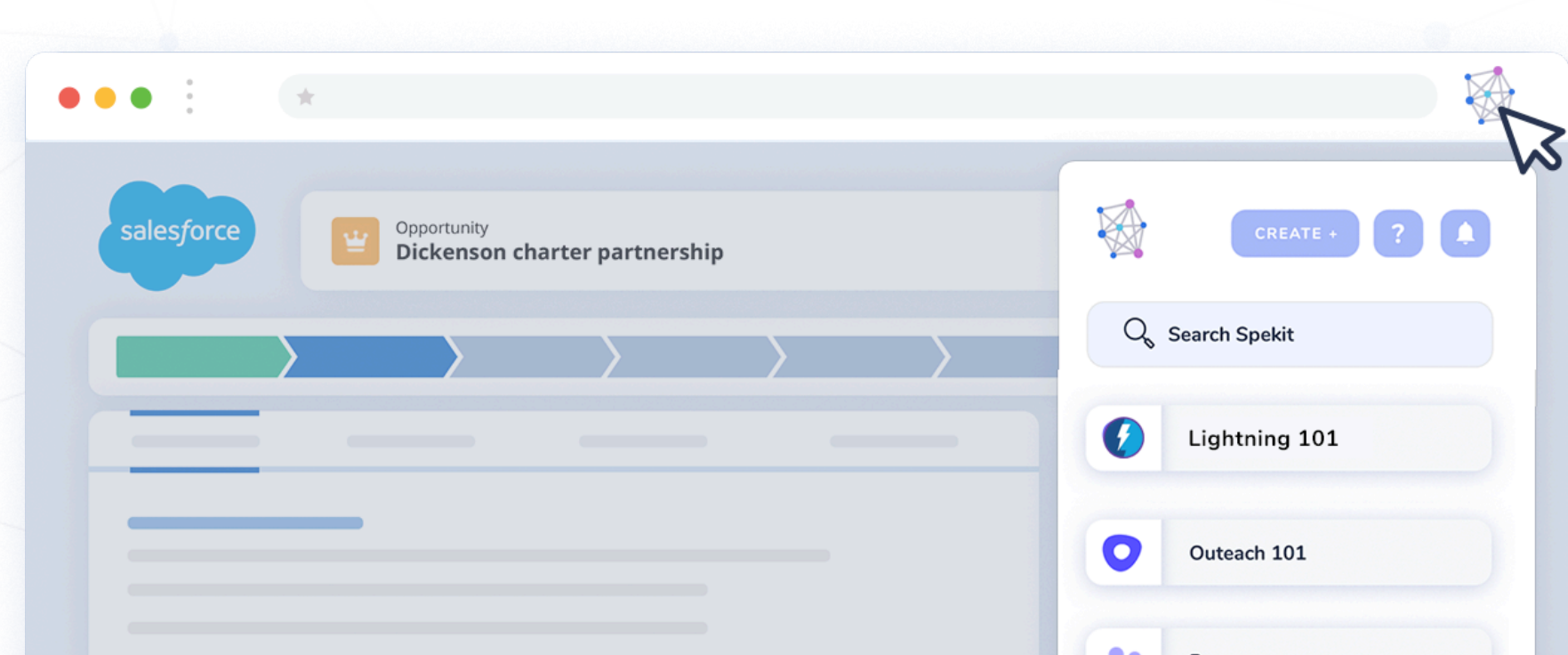
Spekit



Mariner
WEALTH ADVISORS

Ready to get started? Request a demo

spekit.co/demo



Spekit

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