BEST PRACTICES GUIDE

Best practices for dynamic change enablement with Spekit

Why change enablement (not just change management) matters now

Out-of-date content isn't a housekeeping issue; it's a revenue risk. When a rep answers with the wrong pricing or an obsolete feature, deals stall or die. That's "content decay," and it happens whenever we launch changes but don't equip people to adopt them — a gap that still swallows 90 % of project effort and budget today.

Spekit tackles that gap by pairing AI-powered delivery with AI-powered maintenance: surfacing the right guidance in-the-moment while continuously flagging anything that drifts out of date. The result is a living, self-healing enablement program instead of a static playbook.

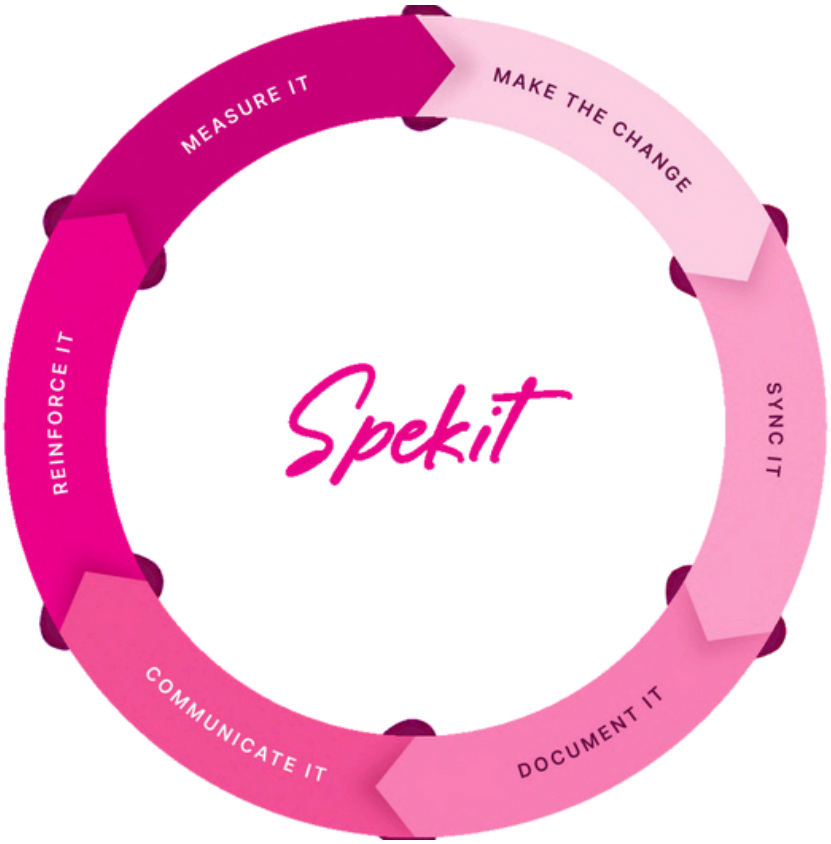
In this guide:

- How Spekit uniquely supports change management
- Twelve ways to use Spekit for high-velocity change
- A repeatable "T-shirt sizing" playbook for every change
- How to put it all together

How Spekit uniquely supports change enablement

Spekit is the just-in-time enablement platform designed to match the speed of change, turning every rollout into a continuous cycle of awareness, reinforcement, and measurable impact.

- Move faster by automating content and change management. Sync and centralize content from existing data sources, then use AI or one of 1,000+ templates to close gaps in seconds.
- Deliver answers & share content, anywhere. Provide instant, in-app access and proactive, personalized guidance, whether reps are in Chrome, Slack, or email.
- Communicate changes & updates with in-app alerts. Instantly notify sellers of time-sensitive updates without disrupting productivity.
- Reinforce tool and process changes when it matters most. Launch quick Knowledge Checks right where teams work to strengthen retention.
- Measure impact & reduce decay with centralized governance. Analyze every content interaction, automate content governance for accuracy and consistency, and showcase ROI on the bottom line.



12 ways to use Spekit for high velocity change enablement

To set your change enablement strategy, and your team, up for success, check out these 12 best practices:

1. Consolidate scattered docs into Speks, Playlists & Deal Rooms
2. Map change types → tool mix with the T-shirt grid below
3. Create templatized Speks so owners rinse-and-repeat
4. Design org structure (Topics/Playlists) around real workflows, not org chart
5. Assess the 5 Ws (who/what/when/where/why) before you publish
6. Start with pre-built packs for content templates for tools like Salesforce, Gong, etc.
7. Choose the right Spotlight placement (any vs. specific URL, banner vs. tooltip)
8. Create feedback loops via reactions, Ask-an-Expert and live office hours
9. Answer every question with a Spek (or Playlist chapter)
10. Reinforce with Knowledge Checks
11. Track quantitative & qualitative engagement with Trackable Links + Revenue Insights
12. Schedule quarterly “content freshness” sprints assisted by AI

1

Consolidate scattered docs into Speks, Playlists & Deal Rooms

Every extra click your reps spend hunting through Google Drive, Confluence, or Slack is a click they're not using to move a deal forward. Spekit's content-management layer turns that sprawl into a single, living knowledge hub, automatically surfacing the best asset at the precise moment it's needed.

With every asset living in (and synced to) Speks, Playlists, and Deal Rooms, reps stop asking "Where's the deck?" and start asking better questions, because the answers they need are already waiting on-screen. Content adoption climbs, deal velocity increases, and AI-powered governance keeps it all fresh without monthly audit marathons.

PRO TIP

Change enablement is a team sport. When thinking through tactics, tap your stakeholders to ensure you've captured everything and to get buy-in on new approaches.

Instead of...	Try...
SharePoint & Google docs lost in repositories	Syncing disparate content & grouping by Playlist or Topic
One-off email blasts nobody saves	Contextual Spotlights or Playlist notifications sent exactly when reps hit the related workflow step
Guessing which PDF to attach	Sending a Spotlight to notify users of a change
Sending recurring email updates to communicate project status changes	Share the curated Deal Room link & track the engagement in your analytics

2

A repeatable “T-shirt sizing” playbook for every change

To ensure consistency and efficiency in your enablement efforts, design a repeatable process that aligns with the scale of the change. A simple “T-shirt sizing” approach can help you determine the appropriate level of effort and the combination of tactics to employ.

Step 1: Align on “T-shirt” size definitions for your various types of changes.

PRO TIP

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

Size	Examples	Enablement Approach
S	New field added to CRM, minor process update, new blog post published	Focus on quick, lightweight communication and reinforcement
M	New product one-pager, updated battlecard, minor feature release	Combine just-in-time guidance with readily accessible resources
L	Major process update, significant feature launch	Combine just-in-time guidance with more structured learning and reinforcement
XL	CRM migration, new tool implementation, new sales leading up to the change, user methodology	A comprehensive strategy combining in-person work- shops, lots of communications acceptance testing (UAT) groups, structured learning and just-in-time reinforcement

2

Align on the steps taken for various types of changes

Of course, this list can be expanded to include other communication and training methods, such as all-hands meetings, weekly updates, asynchronous mini-courses, assessments, and more. The key is to tailor the approach to your specific needs and maintain consistency across similar initiatives.

Size	Live Training	Course	Documentation	Email/Chat
S				X
M			X	X
L		X	X	X
XL	X	X	X	X

Step 3: Communicate this framework (and make it easily accessible) to your entire team to ensure alignment.

3

Create Spek templates to easily rinse-and-repeat

After you decide how you'll consistently use Spekit for change management, you need to establish repeatable 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:

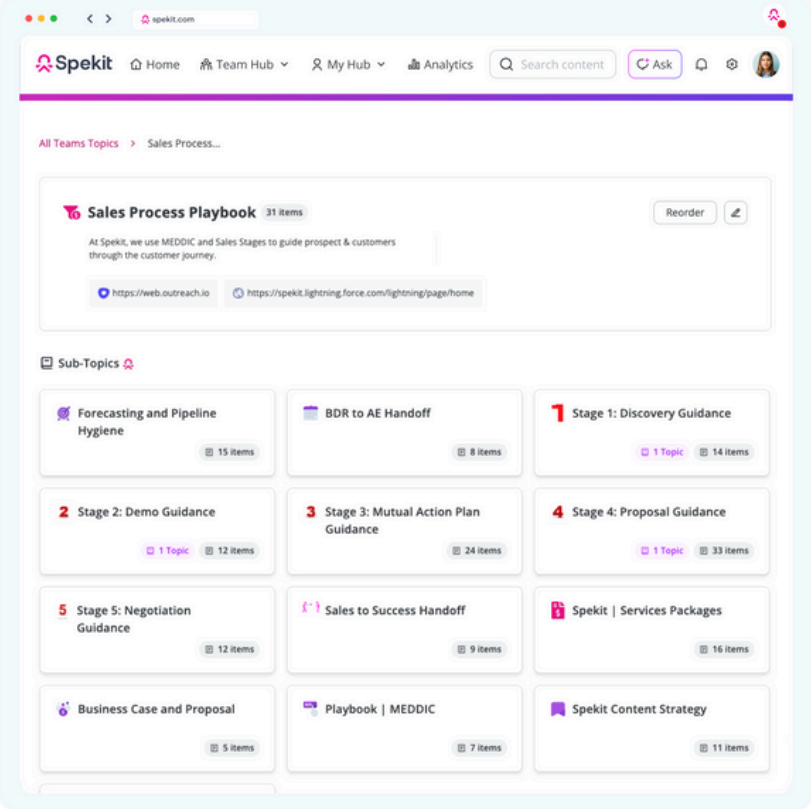
- Create a Topic called "Change Management | Templates"
- Add a Spek to the Topic called "Change Management | Templates | Small Change"
- In the Spek, outline the format and information required
- Add a section to the Spek that advises users when and how to disseminate the information (Hint: Remind them 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.

4

Design content structure (Topics/Playlists) around workflows



Reusable templates turn “random acts of enablement” into a scalable system. Instead of every PMM or frontline manager reinventing the wheel for a pricing tweak or battlecard, they grab the approved Spek frame, fill in a few blanks, and publish. Consistency builds trust with reps and with AI Sidekick now able to pre-fill baseline content or release-note data, creation time drops by 70%.

With templates in place, enablement owners stop formatting and start enabling. Reps see instantly recognizable layouts, search quality improves, and AI systems have clean, structured data to work with — meaning every future Spek, Playlist, and Deal Room gets created faster and stays accurate longer.

5

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:



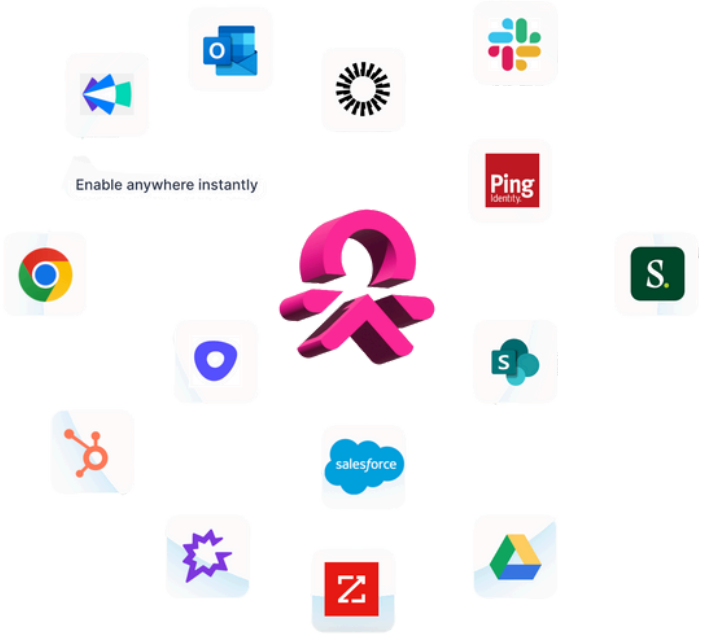
We added a new field to the Opportunity object called XYZ. To ensure you are paid correctly and on-time, make sure to fill it out when converting a deal to "Closed Won.



On 12/1/21, we are adding XYZ field due to requirements from the finance team.

6

Start with prebuilt content templates



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.

7

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.

Spotlight appears on...	Use for...	For example...
Any URL	Critical communications	“X part of the product is down. Do not demo!”
Specific URL	Just-in-time reinforcement of process changes	Making a change to a process associated with a specific tool

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.

8

Create feedback loops via reactions, Ask-an-Expert and live office hours

The change is live and employees have the resources you created for them. But, that doesn't mean your job is done.

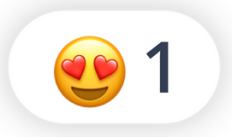
Effective change enablement depends on feedback. Do your employees understand the information you shared? Do they have questions that your materials don't answer? If you don't provide ways for employees to give feedback, you won't know.

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.

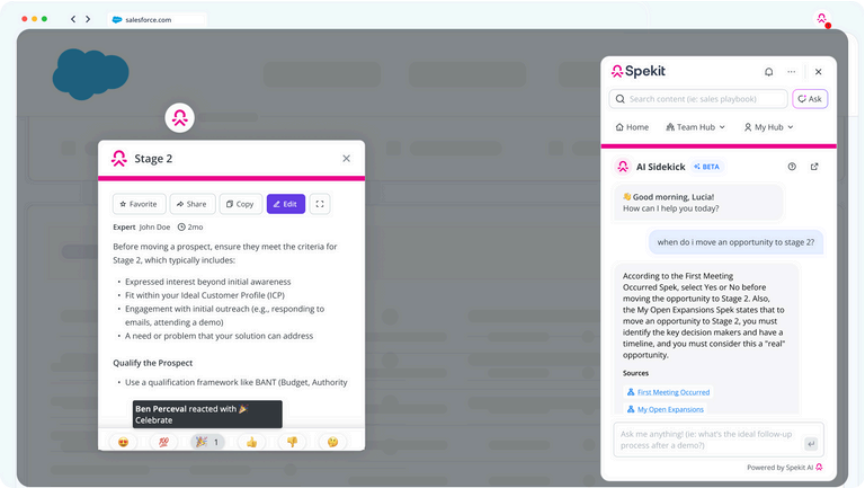
PRO TIP

If you create a Slack or Teams channel, don't forget to pin the relevant Topic or Spek to the channel.



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Answer every question with a Spek



PRO TIP

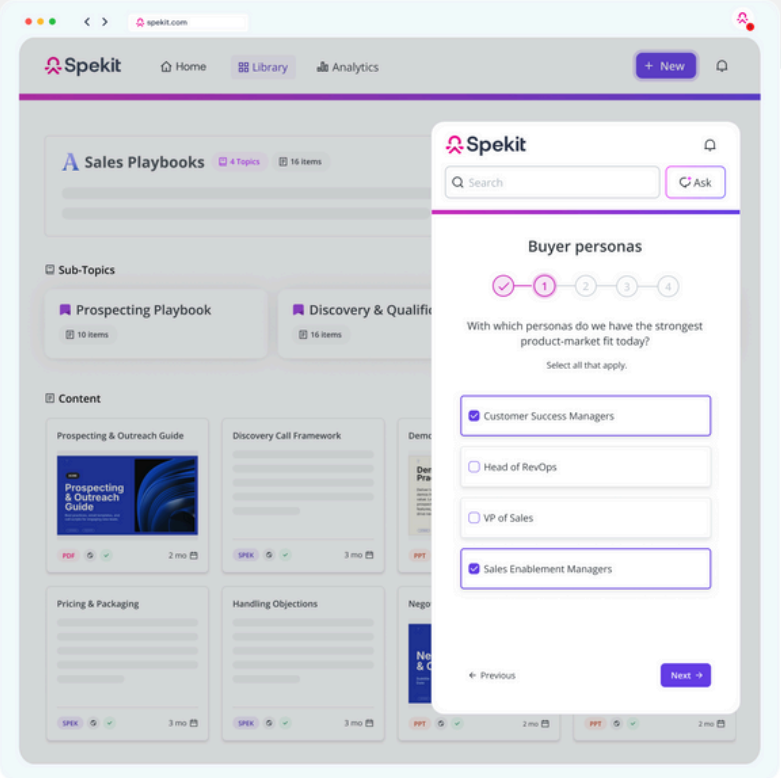
Our Slack integration is for more than sharing Speks. Use it to create new Speks directly from Slack messages.

When questions pop up, resist the urge to type out a fresh answer. Grab the Spek that already covers it and drop the link — Spekit AI Sidekick will even surface the Spek for you in Slack, Teams, or Gmail so it's a one-click share. If no Spek exists yet, turn the question itself into the title of a new Spek, paste in your answer, and hit publish. From then on, Sidekick auto-recommends that Spek whenever the same question reappears, and reps learn to check Spekit first before pinging you.

The result: fewer repeat questions, faster ramp for new hires, and a continuously growing knowledge base & content management platform that stays current without extra busywork.

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Reinforce changes with Knowledge Checks



PRO TIP

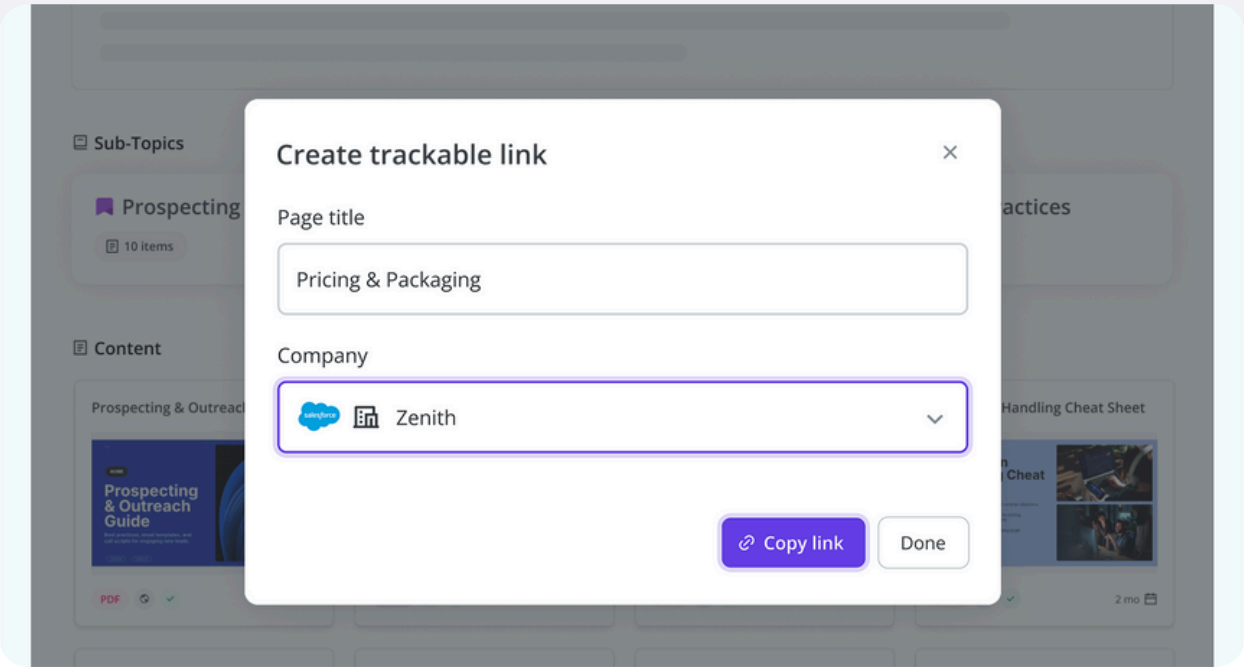
To boost engagement with a Knowledge Check, share it in a Spotlight.

Even after a flawless rollout, retention fades fast. Drop a Knowledge Check right where reps work, inside Salesforce, Gmail, Slack, or any web app, and in 60 seconds they'll refresh the new pricing rule or CPQ flow without leaving their screen. Because the quiz is contextual and bite-sized, engagement stays high; because results hit your dashboard the instant it's completed, you immediately see who's solid and who needs a nudge.
In practice that means:

- Reinforce critical changes, instantly. Push a five-question check the moment a rep opens the updated field.
- Close the loop with data. Analytics reveal knowledge gaps on the spot, so you can trigger a follow-up Spek or Playlist instead of guessing.

11

Track engagement with Trackable Links + Revenue Insights



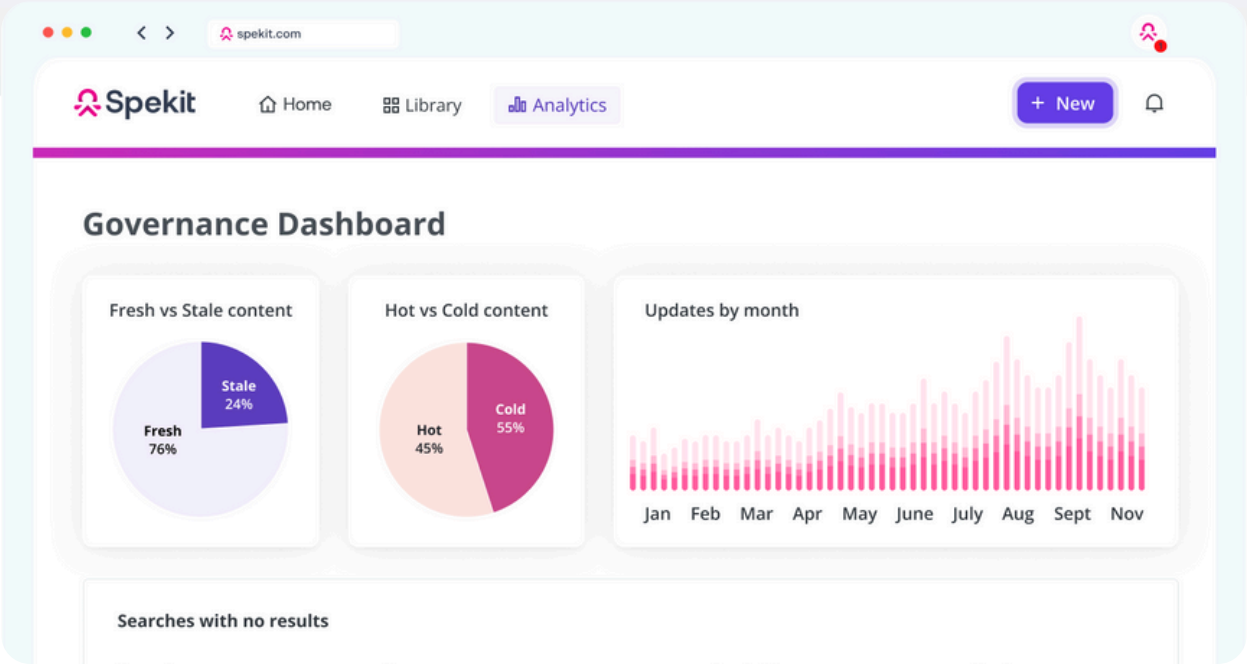
Change enablement isn't finished when the announcement goes out, it's finished when every seller has adopted the new pricing, process, or pitch. Send the update with a Trackable Link and Spekit records every open, view, and reaction. Those signals flow straight into Revenue Insights, turning your rollout into a measurable, improvable experiment:

- See adoption in real time. Dashboards surface who viewed the update (and who hasn't) broken out by team, segment, or role.
- Intercept pockets of resistance. Filter for low-engagement cohorts and trigger an automated Spotlight or Knowledge Check before bad habits take hold.
- Tie engagement to outcomes. Revenue Insights maps link activity to pipeline velocity and closed-won rates, so you can prove the change is moving the numbers, not just inbox traffic.

With Trackable Links feeding Revenue Insights, every rollout becomes a data-driven loop: announce, measure, adjust, and watch adoption stick.

12

Schedule quarterly “content freshness” sprints with AI



Spekit is designed to match the speed of change, giving you a built-in governance layer that keeps content accurate and high-impact. First, tap the Analytics & Insights dashboard to analyze every content interaction with reporting and insights to address gaps quickly and drive real revenue impact. From there, the platform does the heavy lifting:

- Automate content governance for accuracy and consistency: AI monitors freshness and flags issues the moment they appear.
- Showcase the impact and ROI your content has on the bottom line: Engagement and revenue data sit side by side, so you can prove which assets accelerate pipeline.
- AI deduplication warns when adding content that’s duplicative to avoid “garbage in” and further cut content decay.

Put a quick “content-health sprint” on the calendar each month: review the flagged items, apply the one-click AI suggestions, and re-publish. With governance on autopilot, your knowledge base stays trustworthy, your enablement stays current, and your revenue team stays ready for whatever comes next.