



E-BOOK

7 Steps to a Highly Successful Seismic Implementation





Table of contents

| | |
|---|-----------|
| Introduction | 3 |
| 1 Start from within | 4 |
| 2 Embrace behaviour change | 5 |
| 3 Take a phased approach | 6 |
| 4 Get organised | 7 |
| 5 Launch an early adopter programme | 9 |
| 6 Launch Seismic and drive adoption | 10 |
| 7 Partner with Professional Services | 11 |
| Conclusion | 12 |
| About Seismic | 13 |



Introduction

Introducing a new enablement platform like Seismic is an exciting opportunity for driving better performance and growth within your firm. It's a way to completely revolutionise the way your team operates by fostering better collaboration, efficiency, and productivity. It can also empower your team to rise to new heights, achieve ambitious goals, and drive sustained success.

But onboarding new enablement tech is not without its challenges. There's urgency to get things right, and ensure the new solution is properly integrated into your team's workflows. And despite your best efforts, there's no guarantee that your team will fully adopt the new platform.

Rest assured, we're here to give you the confidence and readiness you need to crush your Seismic implementation, along with teams that will support you every step of the way. We'll guide you through a step-by-step process that drives smoother launches, better adoption and ROI, and will position your team for immediate and lasting success.

97% of financial services leaders we surveyed say their firm is ramping up enablement tech spending¹.

Source: <https://seismic.com/resources/reports/revenue-enablement-financial-services/>

1 Start from within

The first step in a successful Seismic implementation has nothing to do with Seismic – it's all about understanding your firm and how it operates. Step into the shoes of your core stakeholders – your marketers, enablement leaders, and client-facing professionals – and experience their day-to-day workflows and processes. By pinpointing their primary challenges and pain points, you'll gain a clearer view of how you can immediately improve their experience.

A great way to gather this information is by surveying a diverse mix of users, including the top supporters of your current processes, top detractors, and those with strong opinions regarding your workflows and content.

Ask questions like:

- What's working well today? What could be working better?
- What content do you find the most valuable?
- Does it take hours to find the right content for specific prospects?
- Do you struggle to get training on a new product?
- Is content creation a constant struggle?

Their answers to questions like these will give you a good feel for what works and what's holding back your teams.

Collaborative group sessions with key leaders and stakeholders are also an excellent way to address the primary needs of your firm and define success. These preliminary conversations will establish your requirements, which Seismic can help you implement.

“Sticking to a narrative through-line of ‘this is what we’re looking to solve, this is what we need to do to get there, and this is what the experience looks like for my end-users’ will help you drive success.”



Sergio Toranzo
Senior Solution Consultant II, Seismic



2 Embrace behaviour change

With a Seismic implementation, you're not simply adding a new tool to your tech stack, you're transforming and modernising your team's client engagement strategy. You're changing the way your teams provide and obtain the knowledge, skills, and content they need to deliver exceptional client experiences at scale.

This holistic, strategic approach often involves refining the behaviours of marketers and client-facing teams: marketers in how they curate and publish content, and client-facing teams in how they access, personalise, and deliver content to prospects and clients. While these changes may be challenging, they'll ultimately drive faster and smarter processes and better client experiences.

Remember, if your firm lacks this transformative mindset, you may risk adding a platform that your core stakeholders won't use or don't know how to use properly, creating low adoption, usage, and wasted time and effort.

Seismic's Strategic Enablement Services can help you with this change management so you can transform enablement into a critical component of your firm's success. Our tailored solutions align strategy, planning, technology, processes, and people to:

- Grow AUM, wallet share, and deepen client relationships
- Enhance operational efficiency
- And deliver consistent, predictable outcomes

"Seismic is not a one and done solution, it's a living, breathing organism that's going to continue to grow, change, and adapt with every user group within your firm."



Emily Dahl
Principal Project Manager, Seismic

3 Take a phased approach

Given Seismic's extensive features, it's natural to feel uncertain about where to begin. In fact, trying to use every feature of Seismic right away can overwhelm you and your users.

Instead, we recommend starting small and focusing on a few primary use cases. By following a North Star, you can keep things simple and quickly resolve your team's largest pain points. You'll also create a strong first impression for end users that can immediately adopt the platform and be more inclined to keep using it.

We also recommend working with us to build a strategic framework for the roll-out, such as a 30-60-90-day plan, as well as the milestones you'd like to achieve along that framework. For a better understanding of a typical implementation timeline, [download this checklist](#).

"Find your North Star. That one big thing that's really going to move the needle for your firm, and that if we can work together to address and resolve, we're going to make waves."



Emily Dahl
Principal Project Manager, Seismic



4 Get organised

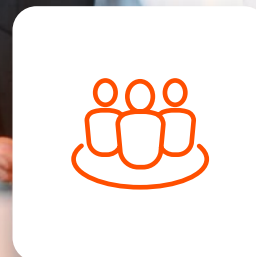
A highly successful implementation starts well before day one. In this section, we'll share a few steps you can take to hit the ground running on day one.

1. Get the right stakeholders involved

You want to ensure the right team members are involved from the start. Zero in on key stakeholders and changemakers who want to advance and modernise your client experience. Also, identify key contributors from different user groups who will most benefit from improved workflows.

- Work with marketers and content creators who are actively involved in content creation, governance, and facilitation.
- Find the right client-facing professionals and enablement leaders who want to improve their team's client engagement strategy.
- Engage IT resources early in the process. Their expertise is invaluable when it's time to support functionalities such as SSO logins, SMTP emails, and mission critical integrations like CRM.
- Engage relevant compliance leaders to ensure updated workflows adhere to their processes and guardrails.
- Connect with data admins to make sure your data is properly organised for automation capabilities.

By bringing together the right leadership, advocates, and evangelists, you'll spark a ripple effect across your business.



2. Get your content in order

With Seismic, everything starts with content. That's why it's important to perform a comprehensive content audit. Start by reviewing and consolidating the strategic assets your key user groups use on a daily basis. Get a firm grasp on the content that will be powered by Seismic's automation capabilities. Separate your strategic assets from outdated, unused, and unnecessary assets that no one will miss if they disappear.

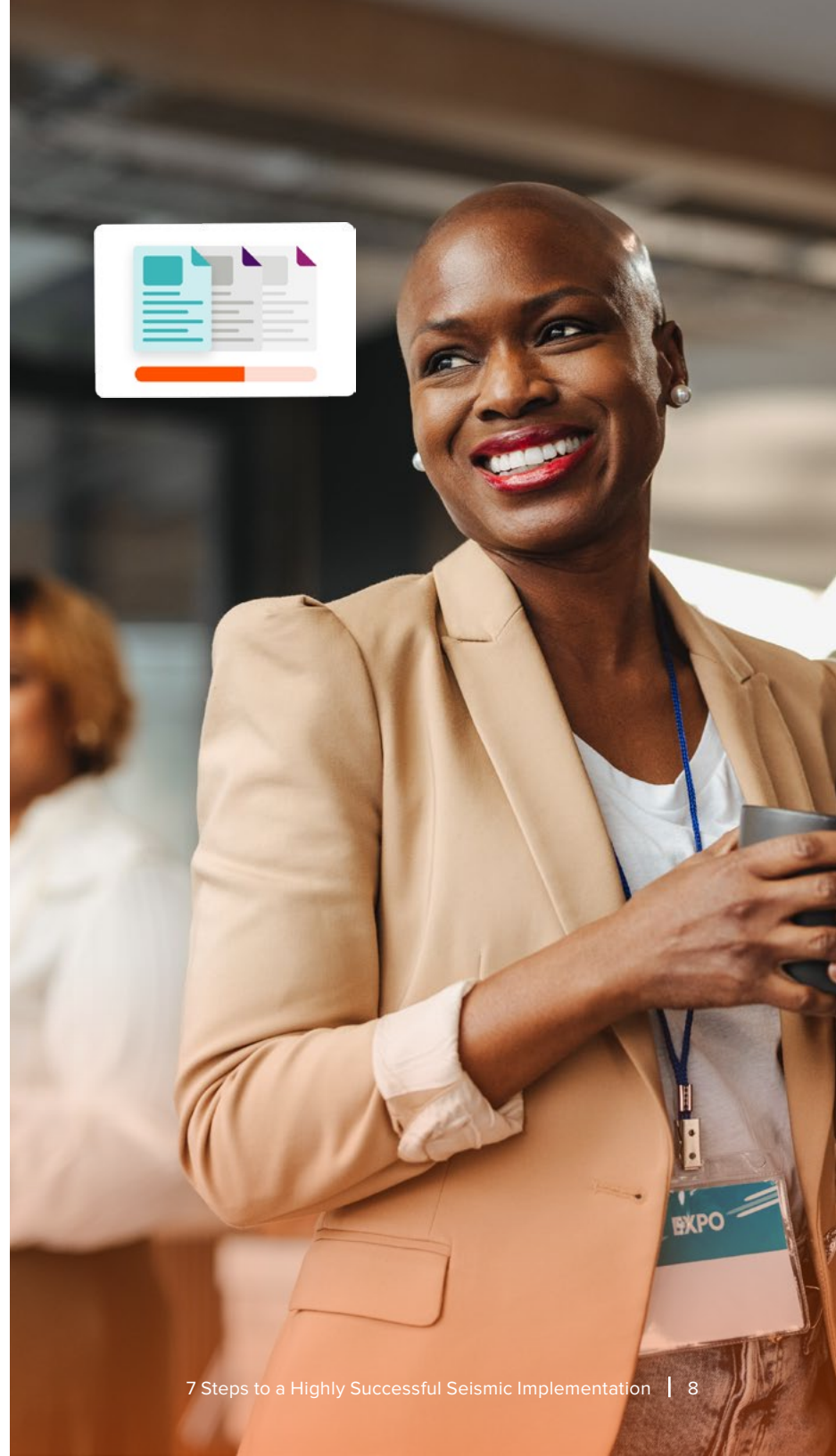
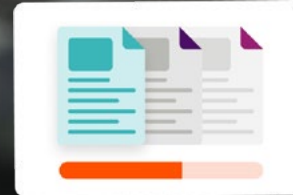
"[With your content audit] Don't let perfect be the enemy of good. If you're unsure if an asset's currently being leveraged, move it into Seismic and use our content analytics to help inform your decisions in future content audits."



Mallory Puckett
Senior Engagement Manager, Seismic

Once you've identified your strategic assets, begin to evaluate how your team currently uses this content and how best to categorise and store them within Seismic.

After that, you're off to the races. Our Professional Services team will be with you every step of the way, helping you configure, onboard, and optimise your Seismic instance to meet your business goals. We'll work with you to build the end-user experience, your content governance model, key integrations, and the first assets for content automation.



5

Launch an early adopter programme

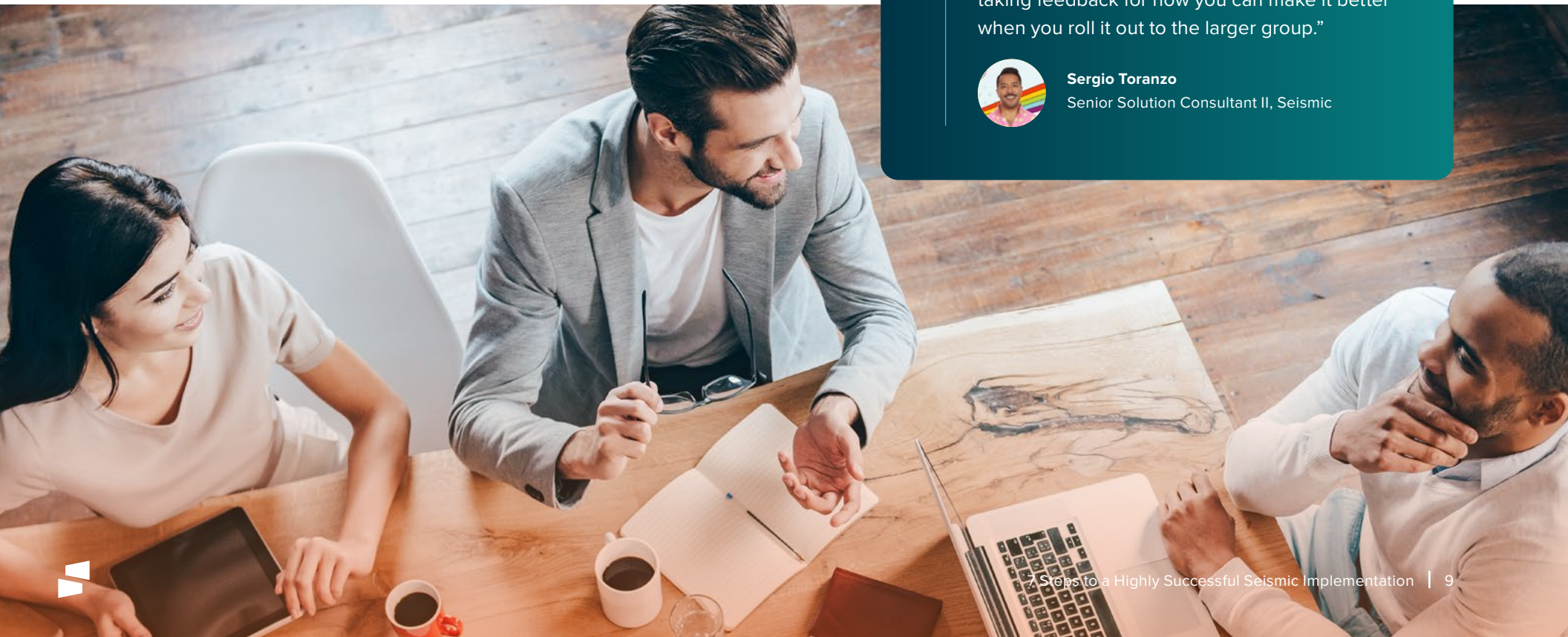
Launching an early adopter programme is a great way to test the end-to-end workflows you've built with a small user group. By testing out the platform on a small scale and with a trusted network of champions, you'll gain insight into what's going to work, what's not, and what needs improvement. You'll also ensure that it integrates with your current tech stack, that your team is on board, and that it's a worthwhile investment for the larger firm. By doing this, you'll

gain meaningful feedback that can help optimise for the full launch. Lastly, you'll be able to continue developing advocates and champions who can persuade other colleagues to adopt Seismic.

“The core of a successful early adopter programme is validating that what you've built makes sense for the larger organization, and taking feedback for how you can make it better when you roll it out to the larger group.”



Sergio Toranzo
Senior Solution Consultant II, Seismic



6 Launch Seismic and drive adoption

Once you've taken feedback and optimised your Seismic instance with the early adopter programme, you're ready for launch. Remember that this is an ongoing process, and strong usage and adoption takes time. Don't base success on where things stand in the first couple weeks. It takes time for end-users to understand how Seismic fits into their workflows, how they leverage it, and how it drives efficiency in their day-to-day efforts.

Seismic's Global Customer Success organisation will ensure your team is well-positioned to unlock the full power of Seismic. A dedicated customer success professional will provide your team with all the resources they need to get organised and get the most out of Seismic, while helping your team onboard, adopt, and mature the platform.

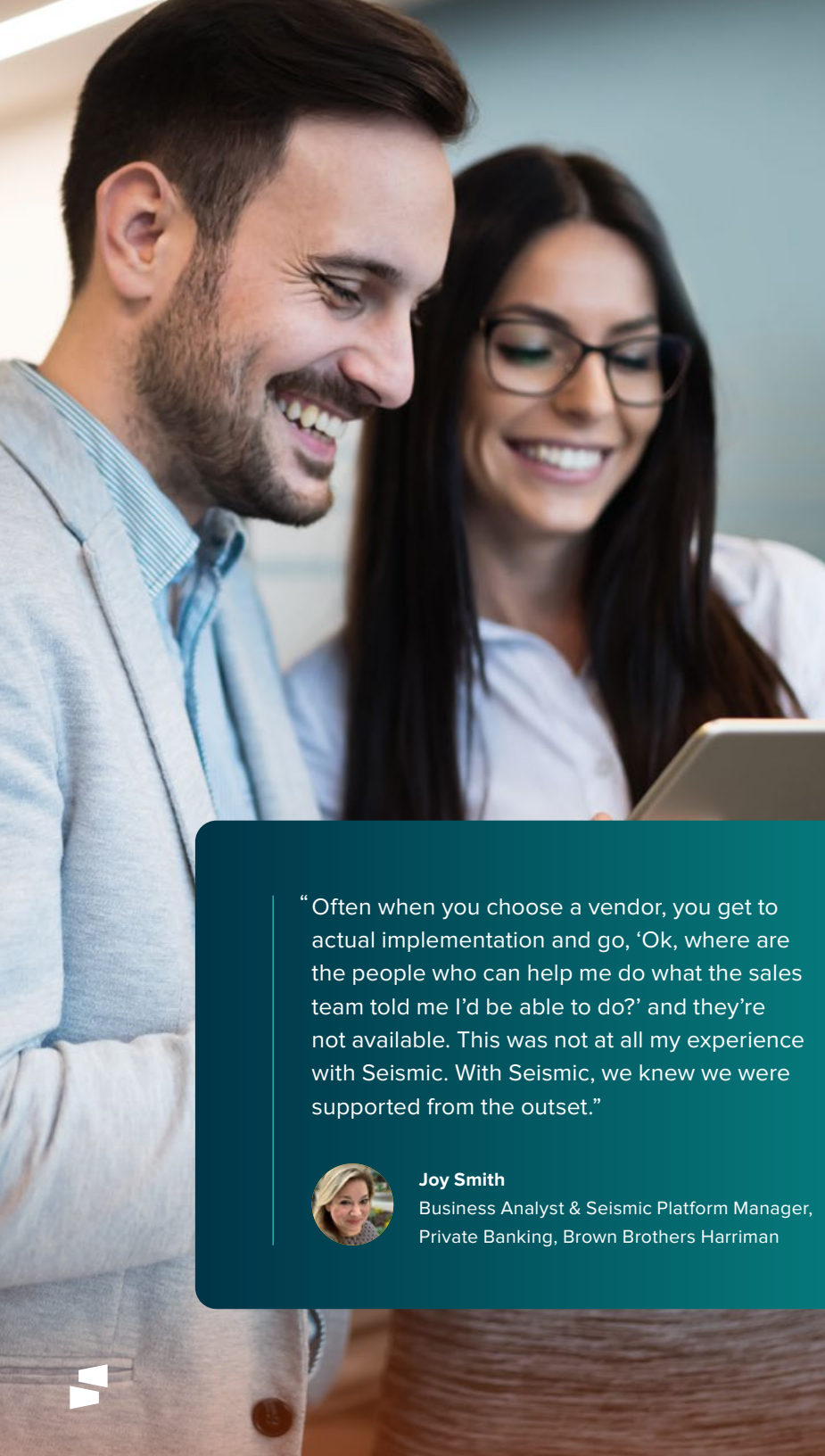
We'll work with you to make sure that you're not simply training end-users once and expecting them to be instant Seismic experts. We'll help you create adoption activities and use cases that make sense for your team in the first months after launch. We'll also help you offer a variety of resources to get users up to speed, including playbooks, office hours, in-person trainings, updates in team calls, click-through tutorials, end-user training pages, and hands-on lessons. By surrounding users with supportive resources and gradually introducing new functionalities, you'll make progress toward your launch and adoption goals. From there, you can continue to expand your use cases and user groups.

When considering strategies for teams with diverse approaches and geographies, it's best to treat each team's implementation separately. This way, you can focus on the overarching goals and major initiatives that will drive success for each individual group. Then you can identify the key stakeholders and influential users within those groups who can champion Seismic and generate a widespread impact.



Discover Lincoln Financial's three-step approach to achieving 100% adoption of Seismic.

[Read their Story](#) →



7 Partner with Professional Services

Seismic's Professional Services team helps you achieve your goals faster by advising you through every step of the enablement journey — strategy, onboarding, growth, adoption, training, and other enablement challenges. Our team takes an intentional approach to customer implementations by providing a step-by-step plan that's prescriptive and flexible, and helps you focus on what matters for launch. Leading over 1,500 successful onboardings, we understand how to tailor our approach to support your individual needs and accelerate ROI.

Our team will give you:

- Comprehensive guidance on content preparation, governance, and other best practices
- An effective approach to content, collaboration, and operations built for today and the future
- A strong foundation of success through rapid development and reliable deployment of Seismic
- Ongoing support and management to increase the value of your programme and facilitate change

“Often when you choose a vendor, you get to actual implementation and go, ‘Ok, where are the people who can help me do what the sales team told me I’d be able to do?’ and they’re not available. This was not at all my experience with Seismic. With Seismic, we knew we were supported from the outset.”



Joy Smith

Business Analyst & Seismic Platform Manager,
Private Banking, Brown Brothers Harriman



Conclusion

Leading a highly successful Seismic implementation is about more than just launching a new platform — it's about transforming the way your teams work, collaborate, and drive results. By understanding your internal workflows and challenges, embracing a culture shift, and taking a phased, strategic enablement approach, you'll pave the way for immediate and long-term success.

But success doesn't stop at launch. Ongoing engagement, training, and reinforcement ensure that Seismic becomes an integral part of your team's daily processes. Leveraging Seismic's Professional Services team, creating an early adopter programme, and continuously evolving will maximise your ROI.

With the right strategy and support, Seismic enables your team to work smarter, deliver a stronger client experience, and drive sustained growth. Ready to see what Seismic can bring to your team?

Connect with our Professional Services team.





About Seismic

Seismic is the global leader in AI-powered enablement, empowering go-to-market leaders to drive strategic growth and deliver exceptional client experiences at scale. The Seismic Enablement Cloud™ is the only unified AI-powered platform that prepares customer-facing teams with the skills, content, tools, and insights needed to maximise every buyer interaction and strengthen client relationships. Trusted by more than 2,000 organisations worldwide, Seismic helps businesses achieve measurable outcomes and accelerate revenue growth. Seismic is headquartered in San Diego with offices across North America, Europe, Asia and Australia.

Learn more at **Seismic.com**.

Speak with the team →