



STRATEGIC ENABLEMENT IN ACTION

How Seismic's Services Transformed Sales Efficiency at Ascensus

QUANTITATIVE HIGHLIGHTS



100% adoption of Seismic by the sales team



64,000+ Seismic links sent, driving greater content engagement



7,700+ content viewing sessions, providing key insights into sales enablement effectiveness



1,900+ unique contact views, showcasing increased outreach effectiveness



10 Digital Sales Rooms templates available, with 97% team usage, enhancing personalized client interactions



380 Page Views of Seismic Academy page



30+ hours saved using LiveDocs, improving efficiency and reducing manual tasks

INTRODUCTION

When Ascensus, a leading provider of retirement and savings solutions, sought to optimize its sales enablement strategy, it turned to Seismic's **Strategic Enablement Services**. Ascensus encountered opportunities to enhance its content management system, streamline training efforts, and develop

scalable solutions to better support its sales teams. Partnering with Seismic's dedicated enablement experts, led by **Irina Soriano, VP, Strategic Enablement Services**, Ascensus embarked on a transformational journey to build a more efficient, personalized, and results-driven approach to enablement.

"Working with Irina's team wasn't just about introducing new tools—it was about accelerating our entire organization toward scalable success. Their expertise helped us bring everything together into a more seamless and scalable strategy."



JIM WALKER
Head of Enablement at Ascensus

Opportunities for Enhancement Before Strategic Enablement Services

Ascensus's internal teams identified areas for growth:



Content organization and governance

Marketing materials were stored on SharePoint but could benefit from improved structure and accessibility to ensure sales reps easily find the most up-to-date resources.



Streamlining workflows

Some manual processes, such as mail merges for email outreach, presented opportunities for increased efficiency and smoother client interactions.



Maximizing Seismic's capabilities

While adoption rates were strong, employees had opportunities to further leverage Seismic's features to enhance their sales efforts.



Improving content engagement visibility

Sales and marketing teams sought better insights into client interactions with content to track outreach effectiveness and optimize materials for sellers.

Recognizing the need for a comprehensive solution, Ascensus saw an opportunity to leverage Seismic's Strategic Enablement Services for expert guidance.

The Strategic Enablement Experience

Seismic's Strategic Enablement Services provided Ascensus with much more than just technology implementation. The team brought in experts to address Ascensus's specific business challenges, going beyond recommendations to deliver actionable

solutions. Working side by side with Ascensus, the team identified key challenges, developed customized strategies, and implemented practical, results-driven initiatives that laid the foundation for long-term success.



A Collaborative, Personalized Approach

From the start, Seismic's enablement specialists demonstrated a deep understanding of Ascensus's unique needs. The team worked closely with Walker and his colleagues to assess the organization's current state and prioritize areas for improvement. This personalized approach was a key differentiator.

"What made this partnership special was the empathy and understanding. Irina's team knew exactly where we were in our journey and tailored their recommendations accordingly," Walker explained. "This wasn't a cookie-cutter approach—it was built specifically for us."

Instead of overwhelming Ascensus with everything Seismic could offer, the team focused on creating a structured and manageable enablement roadmap.

Building Strong Foundations: Content Curation and Governance

One of the first steps was enhancing content organization and governance. Seismic's team guided Ascensus through a curation process, ensuring that only relevant and valuable materials were migrated into Seismic's content hub. They also established governance processes to ensure the content remained well-organized and easy to access.

"It wasn't about just moving everything from SharePoint into Seismic. Irina's team helped us think critically about what we actually needed and how to structure it properly," Walker said.

This initial step laid the groundwork for scalable content management and helped the sales team access the right materials more efficiently.

Training That Scales: The Seismic Academy

Seismic's team designed and implemented the **Seismic Academy**, a comprehensive training program structured around progressive learning levels (101, 201, and 301). The academy enabled Ascensus's employees to gradually build their knowledge of the platform, starting with basic content navigation and progressing to advanced use cases like creating Digital Sales Rooms.

"The Seismic Academy was a game-changer," Walker said. "It allowed us to take a bite-sized approach to learning. Our team didn't feel overwhelmed—they could absorb the basics first and then tackle more

advanced tasks as they gained confidence." Leadership teams were able to direct employees to specific parts of the training when needed, ensuring continuous improvement and adoption.

Additionally, Seismic deployed the **Skill Development Program**, helping Ascensus map competencies for key roles and build structured training programs tailored to the needs of its sales teams. This initiative ensured that skill-building efforts were aligned with business objectives, enabling sellers to maximize their effectiveness in client interactions.



Designing Impactful Digital Sales Rooms (DSRs) and Pages

The collaboration also focused on creating **custom Seismic Pages and Digital Sales Rooms**—key tools that enabled the sales team to personalize their outreach and accelerate deal cycles. Irina's team provided hands-on training and best practices, even working with Walker to refine and polish early drafts of Seismic Pages.



"Irina and her team taught us how to build pages that looked professional and were easy to use. Small design tweaks made a huge difference, and those lessons are something we'll carry forward as we scale this initiative."

JIM WALKER

Head of Enablement at Ascensus

Digital Sales Rooms transformed how Ascensus engaged with financial advisors. Instead of sending traditional email attachments, the team created interactive, personalized landing pages tailored to each advisor’s needs. This approach not only saved time but also made a strong impression on clients. With 10 available DSR templates, Ascensus created 258 DSRs, allowing sellers to deliver highly personalized client experiences and streamline sales processes.

"One of our team members used a Digital Sales Room and won a deal because the advisor felt we had created something just for them," Walker said. "It’s incredible how something that seems so simple can have such an impact."

Key Outcomes

Seismic’s Strategic Enablement Services delivered measurable results by embedding deeply within Ascensus’s teams, conducting thorough investigations, and ensuring actionable, sales-driven outcomes.

INCREASED PERSONALIZATION AND EFFICIENCY

Through deep discovery sessions with sales leadership and frontline sellers, Strategic Enablement Services identified opportunities to elevate engagement and introduced Digital Sales Rooms, leading to personalized client interactions. These efforts enabled more tailored, impactful outreach while reducing manual tasks and saving sellers 30+ hours using LiveDocs.

STRONGER TRAINING ADOPTION

Strategic Enablement Services worked closely with Ascensus to secure leadership buy-in and align enablement initiatives with real-world seller challenges. By partnering directly with sales teams, Strategic Enablement Services developed The Seismic Academy, ensuring training was practical, digestible, and immediately applicable. This contributed to 100% adoption of Seismic by the sales team and an increase in content engagement, with 7,700+ viewing sessions and 64,000+ Seismic links sent during Q1.

SALES-DRIVEN RECOMMENDATIONS WITH IMMEDIATE IMPACT

Rather than providing theoretical guidance, Strategic Enablement Services conducted hands-on discovery sessions with sellers to understand their needs firsthand. This direct input shaped customized recommendations that addressed seller pain points, resulting in several early wins, including deals that might have otherwise been lost. The introduction of Digital Sales Rooms also improved engagement tracking, with 1,900+ unique contact views providing greater insight into buyer interest

To enhance measurement and optimization, Seismic introduced the **Enablement Analytics Program**, equipping Ascensus with data-driven insights into engagement behaviors, seller effectiveness, and content impact. This allowed leadership to track enablement success and refine strategies based on measurable outcomes.

“ The collaboration with Seismic has helped us redefine how we approach sales enablement. Thanks to Seismic’s Strategic Enablement Services team, we’ve accelerated our ability to train, support, and enable our people with tools that directly impact performance. This strategic alignment is positioning us for sustained growth and success in a competitive market.”



JASON CRANE

Head of Core Retirement, Ascensus

"We've already seen the difference. Minutes saved here and there are turning into hours and days given back to our sales team," Walker said. "It's allowing them to focus on what matters—building client relationships and closing deals."

The Path Ahead

Looking forward, Ascensus plans to build on the foundation established with Seismic’s Strategic Enablement Services by advancing its overall enablement maturity—ensuring that its people, processes, and technology continue to evolve in alignment with business goals.

"Seismic’s Strategic Enablement Services have improved how we connect marketing, sales and clients. The combination of easy-to-access content and training, data that enables intelligence and optimization, and personalized experiences empowers our salesforce to deliver the right information to the right client at the right time, driving better engagement and business outcomes."



EMILY PACHUTA

Chief Marketing Officer, Ascensus

With a structured enablement framework now in place, Ascensus is positioned to:



Strengthen data-driven decision-making by connecting CRM insights with Seismic's engagement analytics, allowing leadership to track how enablement initiatives directly influence revenue and performance.



Refine and optimize outreach strategies, leveraging tools like Seismic's Blast Email functionality not just to enhance personalization, but also to create a more scalable, data-backed approach to customer engagement.

Through this journey, Ascensus has evolved from simply adopting enablement tools to embedding enablement as a strategic function—maturing its approach to training, content management, and sales engagement.

"We know what the big picture looks like now. It's no longer a jigsaw puzzle without a reference—we have the guidance, the strategy, and the tools we need to continue evolving," Walker said.

CONCLUSION

Seismic's Strategic Enablement Services didn't just provide Ascensus with a platform—they delivered a tailored, collaborative experience that transformed how the company approaches enablement. By working hand in hand with the Seismic team, Ascensus built a strong foundation for scalable growth, achieving both immediate wins and long-term strategic alignment.

"Without their expertise, we wouldn't be where we are today," Walker concluded.
"They've given us the direction and the momentum to keep moving forward."



See what's possible with Seismic Enablement Services today.

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