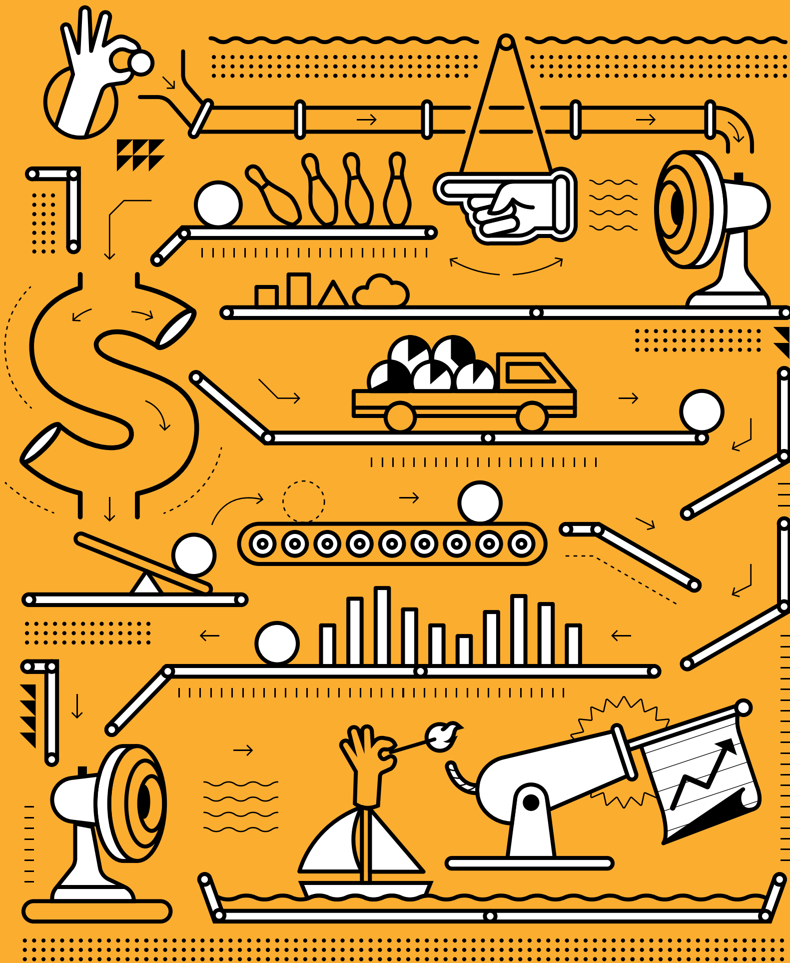


Sales Teams and Slack

A Handbook

slack

A primer on managing sales pipelines, working with internal teams, and landing more deals with Slack

The average company loses more than 20% of its productive power to "organizational drag."[1] That includes all the time teams spend searching for the name of their customer's favorite doughnut shop before an upcoming visit, or coordinating internally on the status of campaigns, projects, and other factors that can impact a deal.

This handbook will show you and your sales team how you can use Slack to keep the sales pipeline flowing. Work in channels, integrate apps and services you already use, and deploy various Slack features to surface information in a jiff so people can spend less time digging through inboxes and arranging meetings, and more time on what matters: providing top-notch service to customers and closing deals.

[1] Michael Mankins and Eric Garton, Bain & Company, "Time, Talent, Energy," March 7, 2017. http://www.bain.com/publications/business-insights/time-talent-energy.aspx

Use this handbook to learn how to:

01 Get access to key information and experts company-wide

02 Track real-time sales data to act on opportunities faster

03 Report and share customer feedback with internal teams

04 Streamline workflows by connecting to services and platforms you regularly use

“Sales teams using Slack experience a 25% increase in potential deals won per year per sales team member.”

IDC research, sponsored by Slack, The Business Value of Slack, 2017[2]

[2] IDC estimate based on average metrics of sales organizations using Slack that participated in this study. Including: 3% more deals in pipeline with Slack, 5% higher deal win percentage with Slack, and 13% less time to close deals with Slack.

01

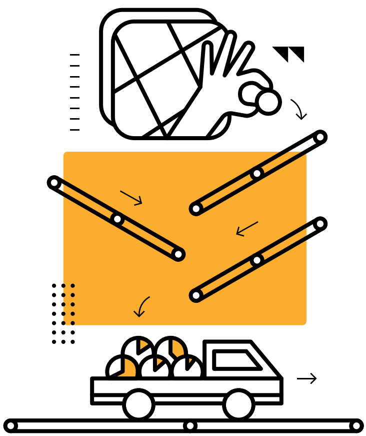
Get access to information and experts company-wide

More than just a place to organize conversations, **public channels** automatically create a hub of knowledge that's searchable by everyone in your organization. If you commit to doing most of your work in public channels, when someone needs more context to move a deal forward—like the deal history, insights about the customer, or the status of a customer request—all that information is readily accessible.

It's best to reserve private channels for conversations that are sensitive or confidential, like budget and deal approvals, and direct messages for quick back-and-forths.

Channel Tips:

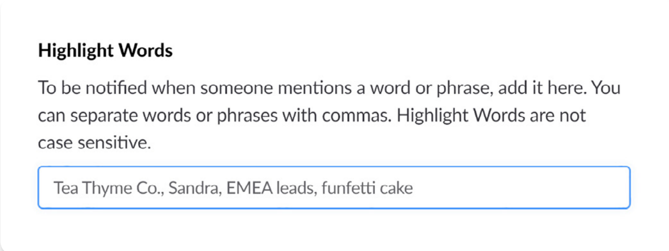
- Organize channels by team (**#sales-team**), projects and accounts (**#sales-teathyme**), region (**#sales-emea**), and function (**#salesforce-notifications** or #sales-announcements) to keep conversations focused. Start with a few and add more as you go.



- Name channels in a predictable way so they're easier to find, like an index. Prefixes help!

- Keep tabs on conversations by starring important channels so that they're pinned to the top of your sidebar.

And say hello to **Highlight Words:** As the name promises, this notification preference will alert you whenever a word that matters to you is mentioned in a private channel you belong to or in a public channel anywhere in Slack.



02

Turn insights into action lickety-split: Pulling real-time sales data into Slack

Timing can be everything when landing a deal. With Slack apps and integrations, you can bring valuable real-time data from a variety of sales systems and platforms into channels where your team discussions are already happening, so everyone has quick access to critical information needed to make decisions, resolve issues, and respond to new leads and opportunities.

Piping sales data into public channels also means managers and people from other teams can stay updated on deal progress without pulling anyone's focus away from their goal. And less juggling between multiple apps and logins means fewer lags in your workday.

Integrating sales tools with Slack

Connect these apps and services to your Slack workspace to manage your sales pipeline in one place.

Salesforce: View and share information about accounts, leads, opportunities, or contacts when you paste a Salesforce URL in a channel. Use the /salesforce slash command to search Salesforce information right from Slack.

Troops: Update both standard and custom Salesforce records from Slack, even while in the field or in transit.

Pipedrive: Forgo weekly reporting meetings by getting deal updates and summaries—like top deals and changes in opportunity size—sent automatically to a channel.

DataFox: Keep tabs on the best time to reach out, and use DataFox to get real-time news alerts about prospective customers in Slack.

Demandbase: Find out when a prospective customer takes an interest by receiving notifications in Slack whenever they explore your website and content.

Intercom: Never miss a chance to connect with prospects when you have their attention. When a visitor to your site starts a conversation, the Intercom app spins up a special Slack channel where you can communicate with that person directly.

Gainsight: Put customer input at the heart of your operations by pulling customer satisfaction feedback and survey responses, like NPS scores, directly into Slack channels.

Discover more in the Sales category of the Slack app directory.

Explore Sales Tools

Tip: Set up weekly reminders (**/remind**) for yourself, a user group (**@sales-smb**, for example), or an entire channel to remind team members to keep their records up to date.

03

Keep customers informed and interested: Working across teams in Slack

Sales teams need to know how to rustle up answers to customers' questions quickly, often between meetings or a hectic travel schedule. Here are a few ideas for how you can set up your Slack workspace to stay closely aligned with other teams whose work supports or affects a deal's success.

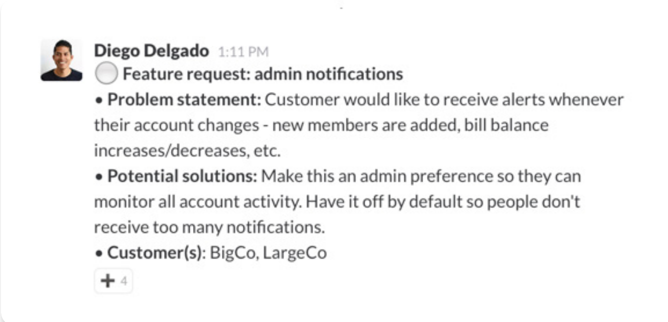
Updated pitch decks and sales collateral at your fingertips

In a channel like #sales-demos, marketing and sales can work together to ensure everyone's singing from the same spec sheet. Avoid version control pandemonium by pinning the most updated documents to the channel, and add the Guru app to turn your conversations into an internal wiki so you can keep important information handy.

Tip: Need to update a proposal with the team on the fly? Launch a Slack call and use screen sharing, or add your favorite video conferencing app to Slack, to work on tweaks and improvements together.

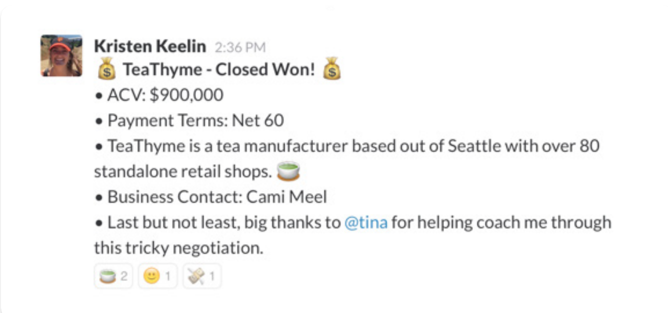
Share and prioritize customer feedback

Create a channel so that sales people in the field can easily report customer feedback and requests to product teams while it's fresh on their minds. When others react to the message with an emoji, it can act as a diagnostic tool, signaling how much need there is for that request.



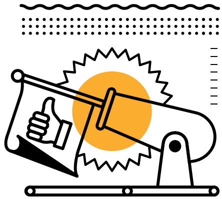
Celebrate wins

Remind everyone that every deal is a team effort by using announcements channels to celebrate new deals as well as the people, across distributed teams and offices, who worked on them. These messages can still include useful information, like the size of the deal and the payment terms, that becomes instantly searchable.



04

Make external partners part of the team: Working in Shared Channels



Congrats! You've closed a deal. Build on the conversations in your account-focused Slack channel by adding account managers, customer success managers, and other team members who will be supporting the account, so they can continue to discuss customer needs and opportunities for renewals, upgrades, and other negotiations.

With **shared channels,** you can create another channel that bridges your Slack workspace with your customer's workspace, so you can field their questions quickly and build better partnerships.

50% reduction in sales cycle duration at Solstice

"I can have an individual finance conversation and create a channel where everything is tracked historically. I can search and find all the relevant files and everything I need. It just moves things through the process so much quicker now."

Dan Karbdatzke,
CFO, Solstice

Learn how to create shared channels.

What's next?

There's lots to digest in this handbook, so here are a few things your team can do for starters to streamline your workflows, speed up your processes, and make information more accessible across teams.

Checklist:

- **Do a little channel clean-up:** Maintaining good channel hygiene is essential for keeping communication between teams and departments crystal clear. Make sure to periodically audit your channel list, archiving ones that are no longer relevant or useful. Check out these tips for reducing noise in Slack.

- **Rethink your channel names:** Is there a consistent naming convention across all your channels? Are they labelled in a way that makes their purpose obvious? Take some time to rename channels so that they're easy to find and follow. Learn more about channel naming best practices.

- **Give some apps a whirl:** Connect a few key services that you use often (like your CRM) to your team's workspace and try sharing and updating data directly in Slack. Explore sales apps for Slack.

For detailed tips and how-tos on organizing channels, working with apps, and more, visit our Help Center. Or if you prefer to talk to a human, reach out anytime at feedback@slack.com or find us on Twitter @slackhq, and we'd be happy to help.

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