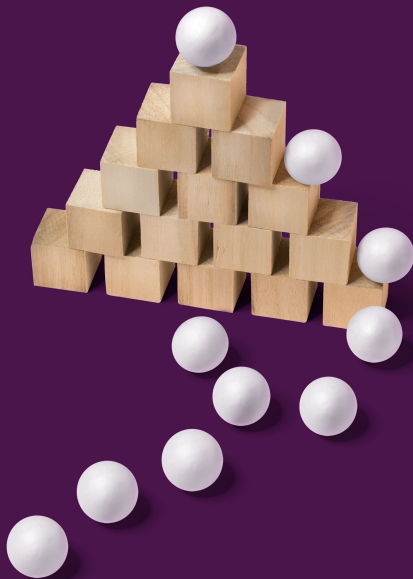


# 16 tips to work smarter with Slack apps and workflows



# Introduction

Too much information scattered across too many tools? With apps and workflows, you can stay focused by streamlining your work in Slack —where all your teammates, tools, and information are together in one place.

Whether you're a Slack pro or just getting started, these 16 tried-and-true Slack tips will help you:

- Maximize your time and reduce busywork
- Stay informed and aligned as projects evolve
- Carve out time to boost team connection

Good luck on your journey, and remember, we're all in this together. 🌈

# Maximize your time with Slack

In the workplace, few things derail focus faster than an unnecessary ping. By customizing Slack to reflect your unique way of working, you can take back control of your time and attention.

Maximize your time with Slack

# Streamline and respond to notifications faster

Slack helps curb context switching with any of the more than 2,500 apps available in the [Slack App Directory](#) that teams can instantly integrate into their Slack workspaces.

When you can organize and respond to notifications ([or even mute them](#)) in one place, you work faster and stay focused on the work that needs your attention.

The screenshot shows the Slack App Directory interface for a workspace named "Acme Corp". The user is identified as "Zoe Maxwell". The "Apps" section is active, displaying "Your top apps" and "22 apps in Acme Corp".

**Acme Corp** ▾  
● Zoe Maxwell

**Apps** [App Directory](#)

**Your top apps**

- Google Calendar**  
See your schedule, get event updates, and more.
- Google Drive**  
Get notified about Google Drive files in Slack
- Salesforce**  
Get notified about Google Drive files in Slack
- Zoom**  
Easily start a Zoom video meeting from Slack

**22 apps in Acme Corp**

- Jira Cloud**  
Notifications, link previews and more.
- Zapier**  
Easy automation for busy people

Maximize your time with Slack

## Never miss another project update

Keep critical updates from getting lost in the noise by setting up notifications from a project management tool, such as [Asana](#), [Trello](#) and [Monday.com](#), to go directly into Slack.

As your team is making progress, you can add new tasks, update tasks with new due dates and assignees, and mark tasks as complete, without leaving your Slack workspace.



**Sara Parras** 11:24 AM

@Matt, let's get the wireframe ready by next week!



**Asana** APP 11:20 AM

@Sara created a new task.

Matt Brewer | Due Aug 18, 2021

[Landing Page Wireframe](#)

2021 Fall Marketing Campaign

View task in Asana

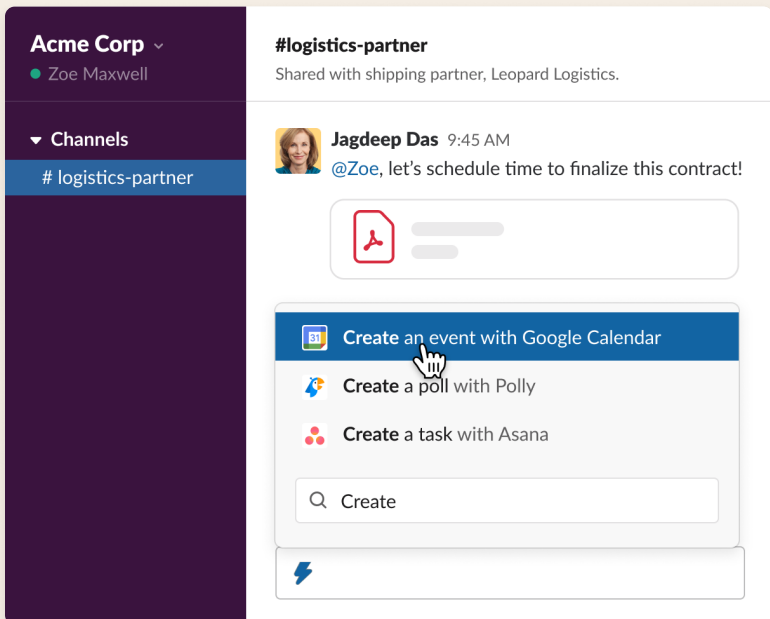
More actions... ▾



## Spin up meetings in a snap

Have you ever put off scheduling a team meeting simply because finding time on everyone's calendar is an ordeal? Or maybe you just received a notification in one of your project management tools that requires more context and you need to spin up a team sync.

The [Google Calendar app](#) and [Outlook Calendar app](#) for Slack eliminate this common pain point and help you [book meetings in a flash](#).

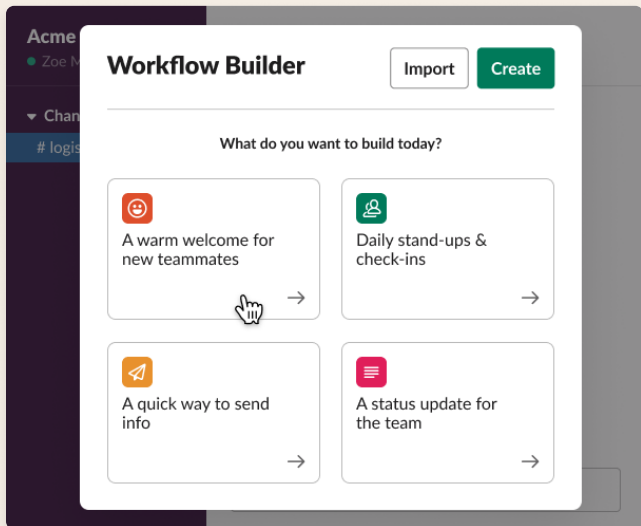


The screenshot shows a Slack channel interface. On the left is a dark purple sidebar with the text "Acme Corp" and a dropdown arrow, followed by "Zoe Maxwell" with a green status indicator. Below this is a "Channels" section with a dropdown arrow and the channel name "# logistics-partner" highlighted in blue. The main channel area is white and shows the channel name "#logistics-partner" and a description "Shared with shipping partner, Leopard Logistics." A message from "Jagdeep Das" at 9:45 AM says "@Zoe, let's schedule time to finalize this contract!". Below the message is a redacted image placeholder. A context menu is open over the message, listing three options: "Create an event with Google Calendar" (highlighted in blue with a hand cursor), "Create a poll with Polly", and "Create a task with Asana". At the bottom of the menu is a search bar with the text "Create" and a lightning bolt icon below it.

## Simplify and speed up everyday processes

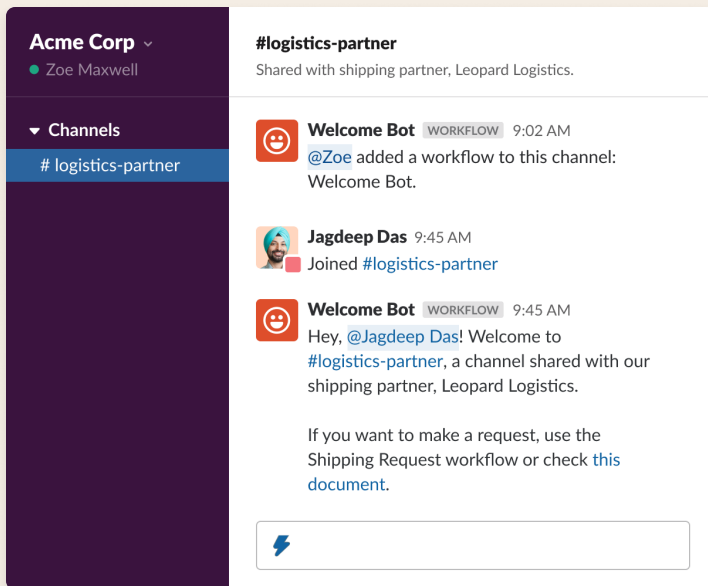
Magic happens when teammates contribute their unique perspectives and skills to projects. But when processes are too cumbersome or vague for people to follow, some of that magic fizzles.

Slack helps teams grease the wheels with a tool any team member can use to simplify and standardize bottleneck-inducing work. That's [Workflow Builder](#): a visual tool that lets anyone automate routine tasks right in Slack, with no coding required.



## Set new teammates up for success with a detailed welcome message

Before any new teammate can begin their work, they need to become familiar with the team's processes. With Workflow Builder, you can automatically share that information with teammates the minute they join a project channel by creating [automated welcome messages](#).



The screenshot shows a Slack interface for a channel named "#logistics-partner". On the left sidebar, the organization is "Acme Corp" and the channel is selected. The main content area shows a sequence of messages:

- A message from "Welcome Bot" (Workflow) at 9:02 AM: "@Zoe added a workflow to this channel: Welcome Bot."
- A message from "Jagdeep Das" at 9:45 AM: "Joined #logistics-partner"
- A message from "Welcome Bot" (Workflow) at 9:45 AM: "Hey, @Jagdeep Das! Welcome to #logistics-partner, a channel shared with our shipping partner, Leopard Logistics."

Below the messages, there is a text block: "If you want to make a request, use the Shipping Request workflow or check [this document](#)."

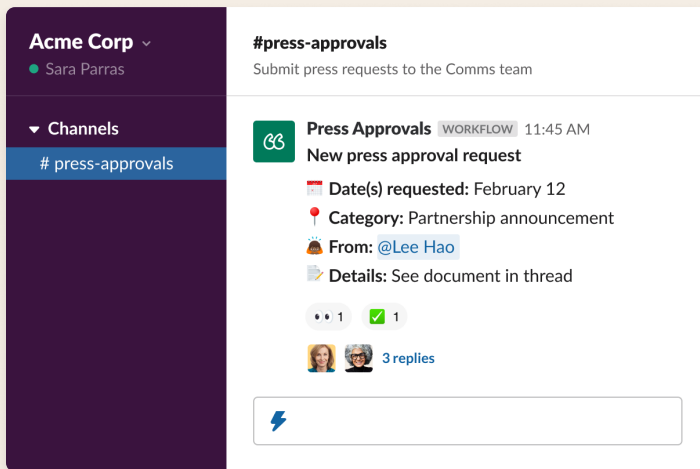
At the bottom of the channel view, there is a lightning bolt icon in a box, representing a workflow trigger.

Your welcome message can include kickoff docs, roles and responsibilities, and instructions for how to make requests.



## Standardize daily processes with Workflow Builder

Another simple way to save time with Workflow Builder? [Attach intake forms to a channel](#) and standardize how teammates ask for help or share feedback. Completed forms can automatically post in a channel, where a quick 👁️ 👁️ [emoji lets the team know](#) who's looking at the submission, and any further conversation is coordinated in a tidy thread.



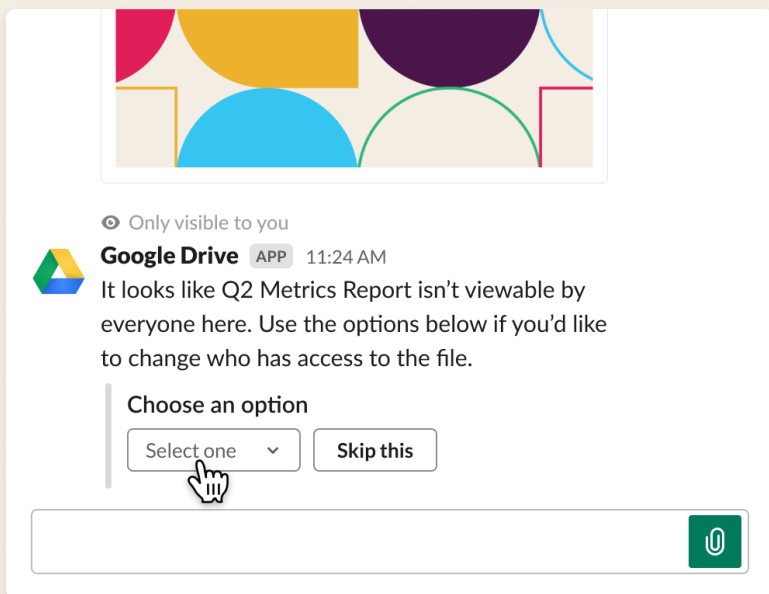
The screenshot shows a Slack interface for a channel named "#press-approvals" within "Acme Corp". The channel description is "Submit press requests to the Comms team". A workflow message titled "Press Approvals" is posted at 11:45 AM. The message content includes: "New press approval request", "Date(s) requested: February 12", "Category: Partnership announcement", "From: @Lee Hao", and "Details: See document in thread". Below the message, there is a reaction of 1 checkmark and 3 replies. A text input field with a lightning bolt icon is visible at the bottom of the channel view.

Intake forms capture all the information needed to take action on a request. No more follow-ups like, “Is there budget for this?” or “Do you have a creative brief?” If it’s in the form, your peers will know what’s required to move a request forward.


## Instantly update file permissions

Nothing creates a bottleneck like forgetting to grant people access to your files. With apps like [Google Drive](#), [OneDrive and SharePoint](#), and [Box](#), you can automatically update file permissions right from Slack.

When you share a file in Slack, the app will give you a friendly nudge if the people in the channel don't have access to it. No more heading into back-to-back meetings only to return to an inbox full of requests.




Only visible to you


 **Google Drive** APP 11:24 AM

It looks like Q2 Metrics Report isn't viewable by everyone here. Use the options below if you'd like to change who has access to the file.

Choose an option

Select one 

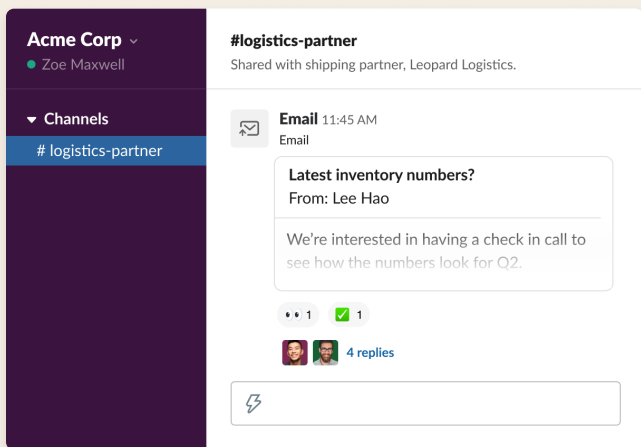
Skip this



## Automatically forward emails into Slack

Among Slack enthusiasts, it's no secret that [channels reduce email clutter](#). But what about those unavoidable emails? Now you can bring [missives out of inboxes and into channels](#), where your team can discuss and coordinate a response in a thread.

Start by creating an email forwarding address for a channel, so any incoming emails get posted in that channel



Once you've generated the email address, you can go into your email client to configure forwarding rules, specifying what emails you want forwarded into the channel. For example, inquiries sent to email aliases like sales@yourcompany or info@yourcompany can be forwarded into the appropriate channel for your team to view and discuss.

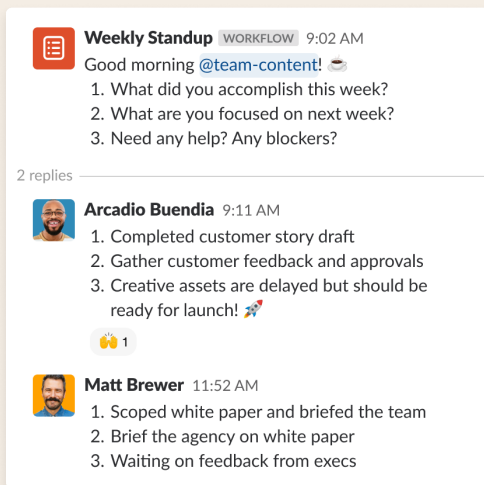
# Keep your team informed and aligned

Swap in-person meetings with simple lightweight processes in Slack that help speed up decision-making — all while ensuring the team is moving forward in lockstep.

Keep your team informed and aligned

## Give and receive updates at your own pace

You can move daily stand-up meetings and check-ins to Slack, allowing team members from Perth to Pittsburgh to share updates in one tidy thread at their convenience.



**Weekly Standup** WORKFLOW 9:02 AM  
Good morning @team-content! 📅

1. What did you accomplish this week?
2. What are you focused on next week?
3. Need any help? Any blockers?

2 replies

**Arcadio Buendia** 9:11 AM

1. Completed customer story draft
2. Gather customer feedback and approvals
3. Creative assets are delayed but should be ready for launch! 🚀

👍 1

**Matt Brewer** 11:52 AM

1. Scoped white paper and briefed the team
2. Brief the agency on white paper
3. Waiting on feedback from execs

With Slack's [Workflow Builder](#), you can create automated prompts that guide workers to provide quick updates each day or week, no coding required.

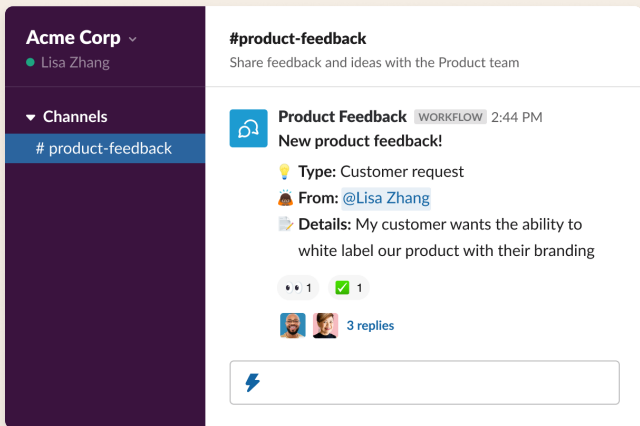
Slack also integrates with apps that let you automate more of your teamwork, like [Polly](#), [Standup.ly](#) and [Geekbot](#). Consider these apps and features as friendly sidekicks, there to help you automate recurring check-ins and retrospectives to keep the team on the same page.

Keep your team informed and aligned

## Encourage always-on feedback

Try creating a virtual “suggestion box” within Slack, providing an always-on, lightweight way for people to share feedback and ideas on their own time.

Start by creating a set of channels using “**#feedback-**” as a [channel prefix](#), like **#feedback-product** for product ideas or **#feedback-marketing** for campaign suggestions. Then, using Workflow Builder, add a simple form to the channel, specifying exactly what information would be helpful as you review the feedback or idea.



The screenshot shows a Slack interface for a channel named **#product-feedback**. The channel description is "Share feedback and ideas with the Product team". A workflow message titled "Product Feedback" is displayed, which includes a form with the following content:

- Type:** Customer request
- From:** @Lisa Zhang
- Details:** My customer wants the ability to white label our product with their branding

The message has 1 reaction (a green checkmark) and 3 replies. A search bar is visible at the bottom of the channel view.

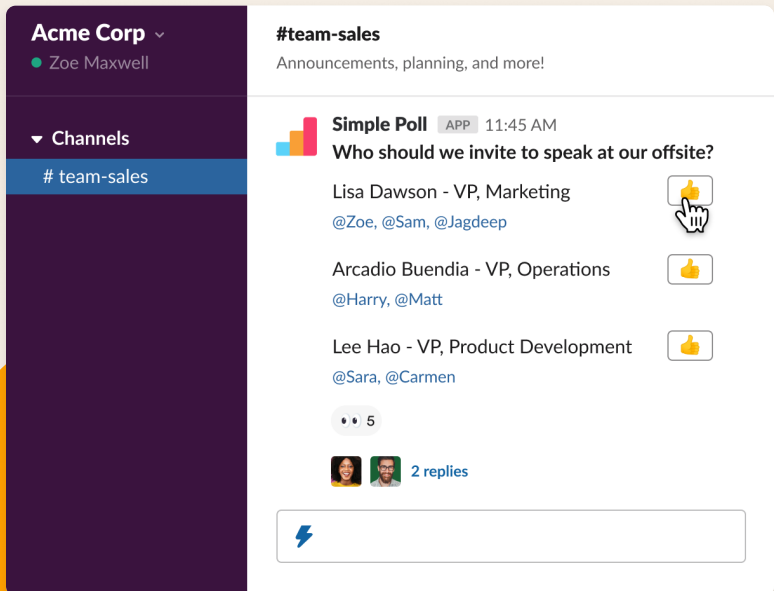
You can even extend this feedback process to people outside your organization via workflows in [Slack Connect](#) channels, the secure way to communicate and collaborate with external organizations.

Keep your team informed and aligned

## Get real-time input with simple, engaging polls

Apps like [Simple Poll](#), [Polly](#), and [Qualtrics](#) meet users where they're already working in Slack, prompting them with engaging polls and surveys that make sharing feedback a breeze.

Many of these apps offer a variety of polling features available to fit your needs, like anonymity, hidden results, scheduling, reminders, event-triggered surveys, templates and more.




The screenshot shows a Slack interface for the "#team-sales" channel. On the left is a dark purple sidebar with "Acme Corp" at the top, a user profile for "Zoe Maxwell", and a "Channels" section with "# team-sales" selected. The main channel area has a header for "#team-sales" with the description "Announcements, planning, and more!". A poll from the "Simple Poll" app is displayed, titled "Who should we invite to speak at our offsite?". The poll lists three options: "Lisa Dawson - VP, Marketing" with a thumbs-up icon and a hand cursor, "Arcadio Buendia - VP, Operations" with a thumbs-up icon, and "Lee Hao - VP, Product Development" with a thumbs-up icon. Below the poll, it shows "5" replies and "2 replies" with profile pictures of two users. At the bottom is a text input field with a lightning bolt icon.


Acme Corp ▾  
● Zoe Maxwell


▾ Channels  
# team-sales

#team-sales  
Announcements, planning, and more!



**Simple Poll** APP 11:45 AM  
Who should we invite to speak at our offsite?


Lisa Dawson - VP, Marketing   
@Zoe, @Sam, @Jagdeep

Arcadio Buendia - VP, Operations   
@Harry, @Matt

Lee Hao - VP, Product Development   
@Sara, @Carmen

•• 5

  2 replies

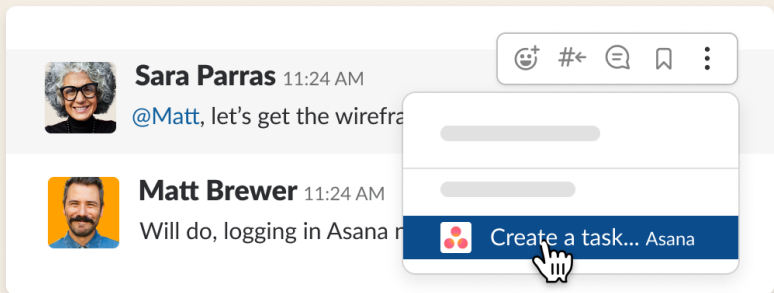


Keep your team informed and aligned

## Share relevant Slack messages with your tools

Slack is where your team comes up with ideas, resolves issues, outlines next steps and takes action. Each conversation holds rich context on how a decision was made, creating a digital footprint of how your team brought a project to life.

You can capture all of those important Slack messages within your systems of record, by attaching them to [Salesforce](#) opportunities, [Zendesk](#) tickets, [Asana](#) or [HubSpot](#) tasks and more.



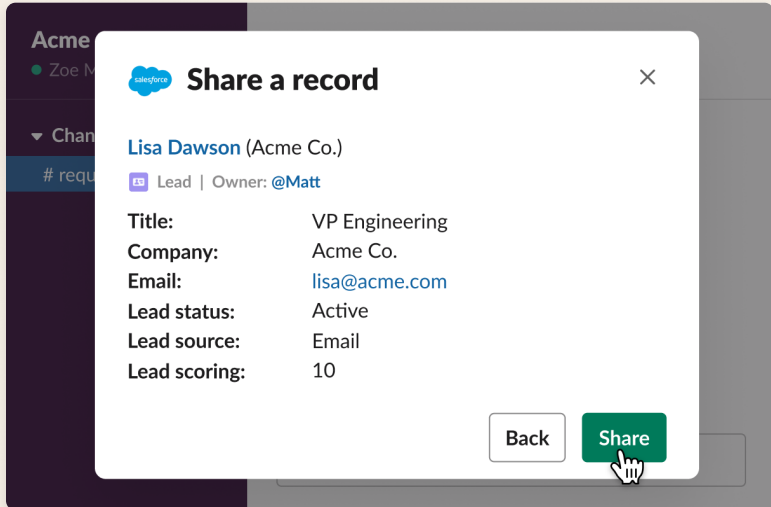


Keep your team informed and aligned

## Pull up key information from your tools without leaving Slack

By connecting the apps you use every day, Slack can become a single home from which you can access all your critical information.

No need to open a full analytics dashboard when you just need a few key stats, or launch your CRM tool when you're simply looking for a quick summary on a lead. Instead, you can surface that information quickly within Slack.




The image shows a Slack interface with a modal window titled "Share a record" from Salesforce. The modal displays details for a lead named Lisa Dawson. The background shows a Slack channel with a sidebar containing "Acme Co.", "Zoe M", "Chan", and "# requ".

**Share a record** ×

[Salesforce](#)

[Lisa Dawson](#) (Acme Co.)

 Lead | Owner: [@Matt](#)

**Title:** VP Engineering

**Company:** Acme Co.

**Email:** [lisa@acme.com](mailto:lisa@acme.com)

**Lead status:** Active

**Lead source:** Email

**Lead scoring:** 10

[Back](#) [Share](#)

# Boost team connection

Whether your organization has returned to the brick-and-mortar office, is fully remote, or is a hybrid of both, here are a few ways you can use Slack to strengthen team connection.

## Automatically round up team shout outs each week

Let Slack be your team's personal cheerleader, prompting everyone to celebrate the wins of the week each Friday.

Choose any channel your team can use to crowdsource, share kudos and [pile on reacji](#) to celebrate a job well done. Next, set up [Workflow Builder](#) to automatically prompt your team to give shoutouts, organized tidily in a thread. You can also use the [/remind slash command](#) so Slackbot will send recurring reminders to your channel.



**Weekly Shout Outs** WORKFLOW 9:02 AM

Happy Friday, Marketing team! 🥳 Why don't you share something great someone did this week?

2 replies



**Sara Parras** 9:11 AM

Kudos to @Lisa for driving our landing page launch this week! 🎉



**Arcadio Buendia** 9:11 AM

Shout out to the content marketing dream team @Matt @Sara for refreshing our ebook page!



**Arcadio Buendia** 9:11 AM

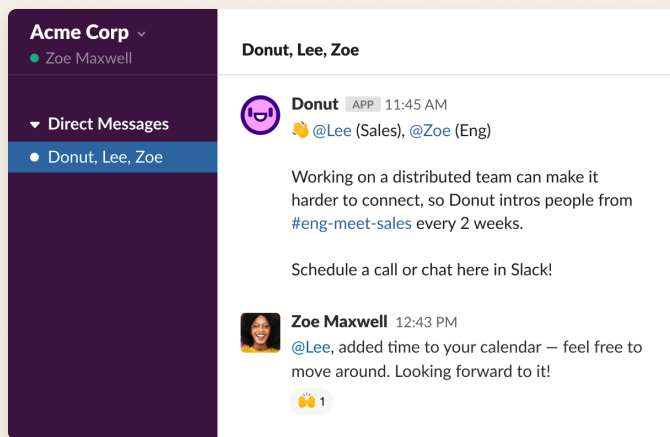
A big thanks to @Zoe for partnering with me on planning our team offsite!



## Automatically get connected to new teammates

The [Donut app](#) introduces people who don't know each other well on teams of all sizes via direct messages and encourages them to meet.

Set up a channel like **#sales-virtual-coffee** or even cross-department channels like **#eng-meet-sales**, and Donut will pair teammates via direct messages.




The screenshot shows a Slack interface. On the left is a dark purple sidebar with 'Acme Corp' at the top, a dropdown arrow, and 'Zoe Maxwell' below it. Underneath is 'Direct Messages' with a dropdown arrow, and 'Donut, Lee, Zoe' is selected. The main chat area is white and titled 'Donut, Lee, Zoe'. It contains two messages: one from the 'Donut' app at 11:45 AM with a purple donut icon, and one from 'Zoe Maxwell' at 12:43 PM with her profile picture. The Donut message includes a lightning bolt icon and mentions '@Lee (Sales), @Zoe (Eng)'. The Zoe Maxwell message includes a thumbs up icon and the number '1'.

Acme Corp ▾  
● Zoe Maxwell


▾ Direct Messages  
● Donut, Lee, Zoe

Donut, Lee, Zoe

 **Donut** APP 11:45 AM  
⚡ @Lee (Sales), @Zoe (Eng)

Working on a distributed team can make it harder to connect, so Donut intros people from [#eng-meet-sales](#) every 2 weeks.

Schedule a call or chat here in Slack!

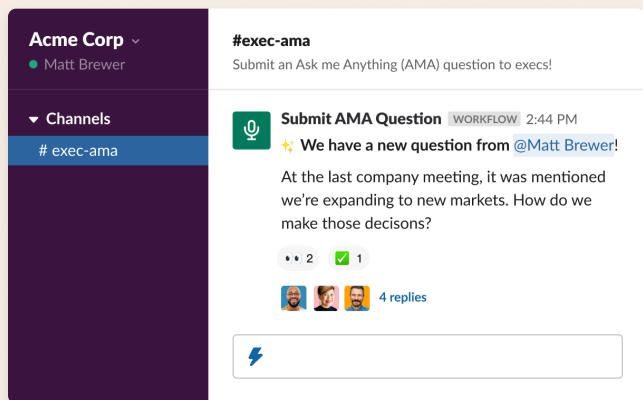
 **Zoe Maxwell** 12:43 PM  
@Lee, added time to your calendar — feel free to move around. Looking forward to it!

👍 1

Not sure where to start the conversation with your Donut match? Add your [favorite things](#) to your Donut profile so the app can help you find common ground, sharing fun facts like favorite foods, hobbies and more.

## Create opportunities to connect with execs in AMAs

Hosting a live “Ask Me Anything” (AMA) session in Slack creates a forum for your team to connect with executives. With a low-friction process of submitting questions directly in Slack, anyone is empowered to ask a question—no need to speak up on a video call.

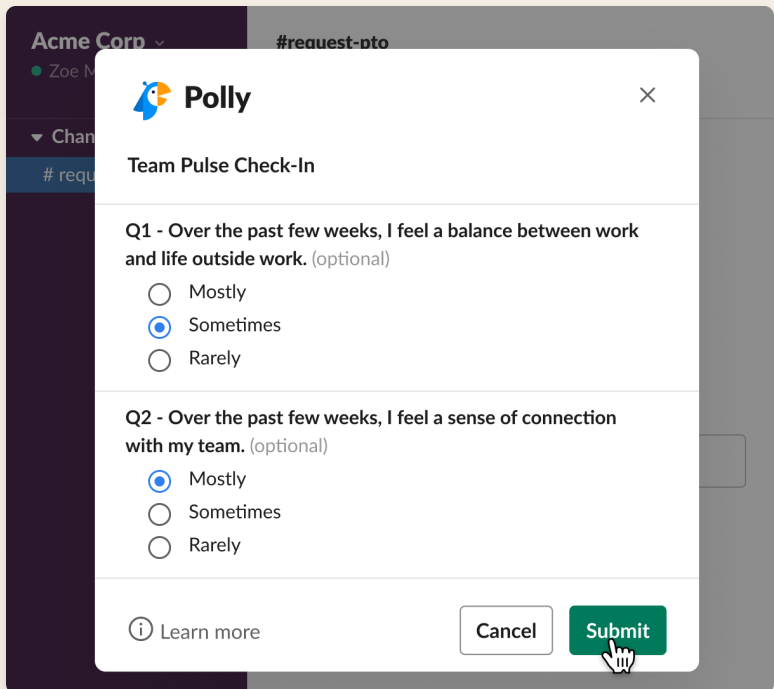


You can [build your own AMA process](#) using Workflow Builder. Create a private form for anyone to submit a question that you can automatically route to the AMA team.

Once that team reviews the submissions—skipping redundant questions and prioritizing what’s most relevant—they can post queries in an **#exec-ama** channel for the executive to answer in real time.

## Keep a pulse on team sentiment with lightweight surveys

Try the [Polly](#), [Culture Amp](#) or [Officevibe](#) apps for Slack to facilitate regular pulse checks, spot trends over time, and take action to boost team morale sooner rather than later. These apps allow you to automate surveys to send out on a recurring basis.



The image shows a screenshot of a Slack channel named "#request-pto" for "Acme Corp". A modal window for the Polly app is open, titled "Team Pulse Check-In". The modal contains two questions, Q1 and Q2, each with three radio button options: "Mostly", "Sometimes", and "Rarely". In Q1, "Sometimes" is selected. In Q2, "Mostly" is selected. At the bottom of the modal, there is an "i Learn more" link, a "Cancel" button, and a green "Submit" button with a hand cursor icon pointing to it.

Acme Corp ▾ #request-pto

Zoe M

▼ Chan

# req

**Polly** ×

**Team Pulse Check-In**

**Q1 - Over the past few weeks, I feel a balance between work and life outside work.** (optional)

Mostly

Sometimes

Rarely

**Q2 - Over the past few weeks, I feel a sense of connection with my team.** (optional)

Mostly

Sometimes

Rarely

*i* Learn more

Cancel

Submit

## Engage with your team beyond the day-to-day

Bridge the social distance gap with fun icebreakers and conversation starters in Slack. It can be as simple as starting a **#random** channel where you can share GIFs, post pictures of pets, share articles, and engage in less work-focused conversations.

With [Donut](#), you can also automatically post conversation prompts in channels that encourage those serendipitous conversations (and friendly debates), whether about the latest TV show you're watching or your go-to karaoke song.



**Donut** APP 3:02 PM

Time for a Watercooler topic!

Have you found any new TV shows or movies lately that you loved?

2 replies



**Lisa Dawson** 3:14 PM

Late to the party but just started watching Ted Lasso and it's brilliant and heartwarming.

+ 6 🗳️ 3



**Matt Brewer** 3:21 PM

We've been on a nothing-but-movies-or-Schitt's-Creek streak.

🔥 6 🤪 3



**Zoe Maxwell** 3:56 PM

@Matt - yes, Moira and David are my favorites!!

👁️ 2

# Where to go for hints and help

Slack support



## **Slack Help Center**

Here you'll find answers to common questions, step-by-step guides on how to customize the product, and useful walk-throughs for every feature in Slack.

[slack.com/help](https://slack.com/help)

## **Slack Resources Library**

All sorts of training guides customized to specific industries, as well as tips on how to improve your organization's use of Slack.

[slack.com/resources](https://slack.com/resources)

## **Slack blog**

Our blog, "Several People Are Typing," covers stories and insights on collaboration, productivity, transformation and all things Slack.

[slack.com/blog](https://slack.com/blog)

**You're doing  
a great job.**

