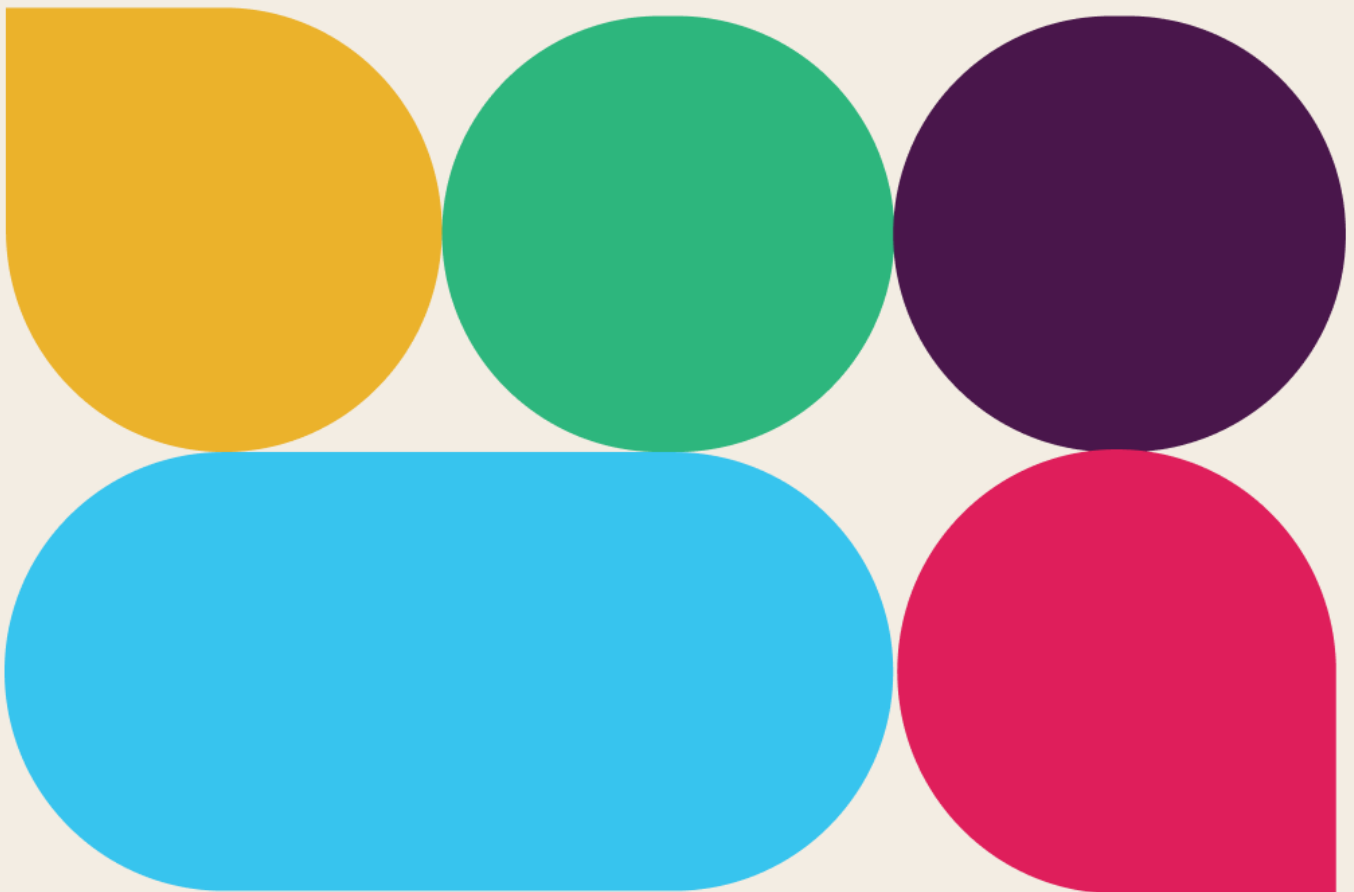


# Slack etiquette guide



# Instructions

## Background

Slack success managers developed the Slack Usage & Etiquette Guide based on learnings from thousands of customers and the best practices deployed by Slack's most successful customers. It is important to highlight these behaviors early and often when rolling out Slack to your organization.

## Customizing this guide

The below template is meant to be customized to your organization and the policies and settings you've decided on. It is best to document your administrative policies and settings prior to completing this template. We've called out the text that must be customized below, but you're welcome to modify the entire document as needed!

## Sharing with end users

Once completed, this document can be published and shared widely across the organization. Consider using a Champions Network to scale these concepts across your user base and embed them in all Slack trainings. It's also important to train executives on these behaviors so that they can lead by example in Slack.

Remove this Instructions page prior to publication.



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## Why Slack

Slack is our **digital workplace** that connects us to our peers, external partners and systems, allowing us to move fast, stay aligned and feel connected—no matter where we are working from.

At *[company]*, we use Slack to... *[insert vision statement]*

## What is Slack?

The fundamental pillar of Slack is a **Slack channel**. Instead of endless email chains, Slack organizes conversations around a topic, project or team in a channel. This provides everyone with a shared view into the work being done, so teams can stay in sync and new members have full context when they join. Conversations become a searchable archive of knowledge.

**Slack Connect** channels extend Slack to **external partners** as well, bringing the power of centralized conversations to everyone we work with. As with email, it is important to use extra caution when communicating externally.

Slack also streamlines work by connecting to our other core productivity tools, such as *[Google Drive]*, *[Office 365]*, *[Salesforce]* and over 2,200 more—and offers **automation opportunities** to even the most non-technical workers.

## Professional expectations

Slack is a **business communication tool**. You should bring the same professionalism to Slack that you do to email and other professional communications. All aspects of the platform must adhere to our employee **Code of Conduct** and **Social Media Guidelines**, without exception. Misconduct, harassment or other inappropriate behavior can result in adverse employment action, including termination.

We generally consider applying these guidelines when using private channels and direct messages, but we also must take into consideration bots, emoji, GIFs, and any other services that we use with Slack.



## Fundamentals: align with peers and partners in channels

Slack is a **channel-based collaboration platform**. With channels, we break down silos between teams, achieve organizational alignment, and move our work forward faster. You can use them to view company- and team-wide announcements, collaborate with colleagues around a task and/or project, ask cross-functional team members for help, and establish community and connect with your peers around shared interests.

Slack channels can also be used to collaborate with service providers, vendors, customers, partners and other third-party business associates directly within our Slack. These channels are called Slack Connect.

With Slack now the default for both internal and external collaboration, emailing your team members can be limited to very specific circumstances.

If you're just getting started in Slack, try to start or join conversations in **public channels**, as anyone can search for, join, learn from and contribute to the conversation. This is the true power of Slack—the transparency created by public channels makes it quick and easy to find out what's going on across our company and your team.

You can also send **direct messages** privately to your team members or create **private channels**. Direct messages are one-to-one conversations. Private channels operate the same as public channels but require team members to be invited into the conversation.

## Get comfortable here

- Download the Slack app for [your desktop and mobile devices](#).
- Upload a profile photo: [Add a fun-but-professional profile photo](#) to help your colleagues get to know you. To take it a step further, fill out the custom fields in your profile.









- **Familiarize yourself with preferences:** The [preferences menu](#) is where you can customize your notifications and set keywords, choose what items appear in your sidebar, and even pick a theme and color scheme for your Slack desktop app.
- **Create channel sections:** Your sidebar can be organized into custom [sections](#) (think folders), allowing conversations to be organized in ways that are helpful to you, whether they're sorted by priority, projects, teams or the type of work you're doing.

## Behavioral etiquette for the hybrid workforce


### Work in channels effectively

- **Find the right channel:** Before posting, make sure you've found the right home for your message. Browse channels and review their membership, purpose, pinned items and recent messages to make sure the channel is the right fit for your message.
- **Search before posting:** The best way to use Slack is with a search mentality: try [searching](#) in Slack before posting a question. It is likely that someone has already asked the same question and received an answer in Slack.
- **Creating channels:** We might be a broken record here ... but be sure to browse existing channels before creating a new one! If you need to create a new channel, consider whether the conversation is sensitive in nature (i.e. HR, acquisition, legal, etc.), where a private channel would be needed. If not, always default to creating a public channel.
- **Channel prefixes:** Following standardized naming conventions for channels will help your colleagues search and join the ones that are most relevant to them (i.e. proj-, announce-, team-). *Please refer to our channel naming guidelines as you create new channels!*
- **Be a good host:** Let people quickly know what the channel is about by adding a [channel topic and/or description](#).
- **Don't be afraid to leave channels:** Feel free to leave channels that are no longer relevant or useful to you. You can always rejoin at any time.



- **Emoji etiquette:** Emoji aren't just for fun! They can help you more effectively communicate with your colleagues. Some functional examples include:
  -  to indicate an announcement
  - , , or  to request help or flag a concern, to indicate the priority of your request
  -  as a reacji, to indicate you are looking into a request
  -  as a reacji to show a completed task/request

## Reduce noise to keep focus

- **Getting people's attention:** **@mentioning** someone will send them a badge notification, letting them know that their attention is needed. Use **@channel** and **@here** sparingly in cases where you need to alert people quickly, such as updating your team about a last-minute change to a project deadline (@channel) or scheduling an impromptu event for people who are available, like a lunch outing (@here).
- **Format your messages:** **Formatting** helps add detail and clarity to your messages in Slack. You can use the formatting toolbar in the message field to do things like bold, italicize or strikethrough in your messages. Emoji can help add levity within your post. In channels, be thoughtful about how you're conveying your message—try to consolidate your thoughts into one post rather than multiple.
- **Thread responses:** Threads tie responses to the original post in the channel, keeping the channel organized and easier to navigate. Threads are especially important in busy channels with hundreds of members. Use the  emoji to give a friendly reminder to someone replying out of thread.
- **Slack Huddles:** Huddles are live, audio-first conversations. Instead of scheduling a 30-minute meeting, pop into a five-minute huddle in any Slack channel or direct message (DM) with a simple click of a button.
- **Let colleagues know you're unavailable:** You don't have to be available 24/7 in Slack! Turn on **Do Not Disturb**, mode which snoozes your notifications for a



designated period of time and makes it clear to your colleagues that you're unavailable. If you plan to be away for an extended period of time (like vacation), **update your status** to let colleagues know when you'll return (e.g. OOO; returning 2/10).

## Forgo meeting fatigue by working asynchronously

- **Clips:** Cut down on meetings with Slack's audio and video options. You can create and share short voice, video or screen-share recordings for others to watch and respond to directly in the channel, at any time that works best for your team.
- **Scheduled send:** When you have an important message to share but prefer to control the date and time of the post, schedule the send and rest assured your message will be sent whether you're at your desk or on the go.

## Don't lose track of important items

- **Save messages:** You can **save messages and files** in Slack to easily come back to them later. Your saved items are only visible to you and can be viewed in one place from your desktop or mobile device.
- **Automate reminders:** Need to go back to a previous Slack message at a later time? Use **Remind me about this** to get reminders from Slackbot.

## Integrate the tools you already use

- **Integrations:** There are hundreds of apps and integrations available with Slack. Before any integration is enabled by a Slack admin, it must follow the app/integration request process.
  - To request a new Slack app, [\[link internal approval guidelines\]](#)
  - Here are some approved apps you can connect with Slack:
    - [\[Link to pre-approved apps\]](#)
- **Workflow Builder:** **Workflow Builder** is a visual tool that allows any Slack user to automate routine functions by creating custom workflows. In just a few minutes, you can have a seamless way to, for example:





- Standardize how you collect requests from your team
- Report any outage in real time
- Get new team members up to speed with welcome messages
- [Get started here!](#)

## Behavioral etiquette for collaborating with partners

### Setting up Slack Connect

- Use a channel name that makes it obvious that this is a shared channel (e.g. adding an “ext-” prefix to the name).
- Add a channel topic and description that clearly describes the business purpose for the channel.

### Working in Slack Connect

- Communicate with the other company as you would in person or over email:
  - Customer privacy and avoiding personally identifiable information should always be your first concern.
  - Confidentiality rules apply at all times.
  - You are representing *[company]* at all times.
  - Always be aware of any information that could be considered material nonpublic information and could violate our *[company]*'s insider trading policy.
- Always be aware of who is in the conversation:
  - Slack logs are viewable by admins on both teams.
  - The need for the channel should be reviewed *[annually]*.
  - Make sure at least one active *[company]* employee is a member at all times.



- Be aware of bots that are installed in the channel:
- Verify that they are needed.
- **Guidelines:** *[Link to separate internal Slack Connect guidelines]*

## We are here to help!

We understand that change is hard, but we (and Slack) are here to support you on this journey. If you have any questions about our internal guidelines, we are monitoring *[insert Slack help channel]*. Visit Slack's [help center](#) or contact the Slack team directly at [feedback@slack.com](mailto:feedback@slack.com) or /feedback in any message box. They are available 24/7 and 365 to answer your questions.



## About Slack

Slack makes work simpler, more pleasant and more productive. It's a channel-based messaging platform for the enterprise that brings the right people, information and tools together to get work done. From FTSE 100 companies to corner shops, millions of people around the world use Slack to connect their teams, unify their systems and drive their business forward.



The preceding information is intended for informational purposes only, and not as a binding commitment. Please do not rely on this information in making your purchasing decisions. The development, release and timing of any products, features or functionality remain at the sole discretion of Slack, and are subject to change.