

The Slack handbook for sales teams

Boost productivity so you can win deals as a team and close deals faster



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Introduction

Today's sales teams need to maximize efficiency. In light of our uncertain economy, salespeople are learning how to quickly adapt to a more productive way to sell.

The average salesperson **only spends 28% of their time** selling.¹ Instead, they're logging client data, tracking down the name of their customer's favorite doughnut shop before an upcoming visit or coordinating internally on the status of a quote approval or a contract.

This handbook will show you how Slack can keep your sales reps engaged and the pipeline flowing. Start working in account channels, integrating apps and services you already use and deploying 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.

Use this handbook to learn how to:

- Get real-time sales data and loop in experts to act on opportunities faster
- Use Slack's asynchronous tools to sell as a team
- Harness the power of automation by creating custom workflows
- Report and share customer feedback with internal teams
- Streamline workflows by integrating the tools you regularly use

¹ "The State of Sales" (5th edition), Salesforce Research, 2022.



Enable faster team selling with account channels

The average sale today involves **10 people, lasts 102 days and happens in a hybrid world**. Sales organizations are adapting quickly to this landscape, enabling reps with technology and shifting how they engage with prospects and customers. Gartner predicts that **80% of B2B sales interactions between suppliers and buyers will occur in digital channels by 2025**.

But a sales motion is only as good as its fundamental strategy. To successfully sell as a team, transparency and access to context history are key, which is why we organize **channels** by account and keep them public.

“One of the biggest value-adds for sales teams using Slack is the ability to create (or automate the creation of) account-specific channels that are linked to Salesforce,” says **Jack Gibbs**, an account executive for large enterprises at Slack. “You can assemble every person who’s key to success—from cross-functional partners to sales leadership.”

Using public channels automatically creates a valuable knowledge hub that’s searchable by everyone in your organization. If you commit to doing most of your work in public channels, it helps new account teammates get the context they need to move a deal forward—such as the deal history, insights about the customer, or the status of a customer request—quickly.

Reserve private channels for conversations that are sensitive or confidential, such as budget and deal approvals, and direct messages for quick back-and-forths.

Tip

If you’ve started a private conversation that you’d like to take public, you can turn a group DM into a channel.

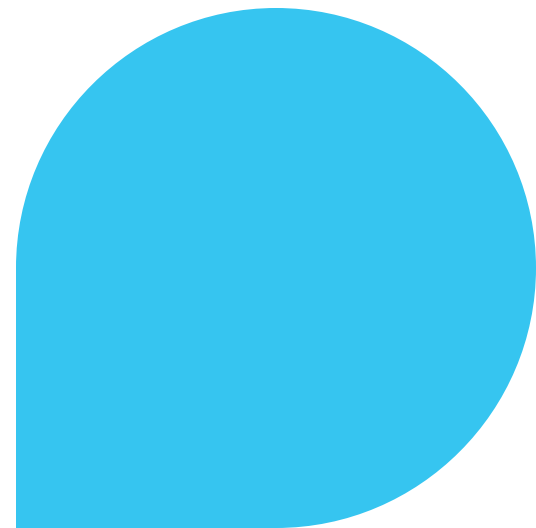


How to get the most out of channels

- Organize channels by team (**#sales-team**), projects and accounts (**#acct-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! Think: **#announce-sales** or **#proj-q4-sprint**.
- Keep tabs on conversations by starring important channels so they're pinned to the top of your sidebar. It's also helpful to pin essential files and resources to arm AEs with all the information they need to get the deal over the line.
- Spin up temporary “deal rooms.” In the later stages of a deal, approvals need to move at warp speed, so it can be helpful to have a channel where you can make timely decisions with stakeholders.

“Moving things as fast as possible is the name of the game. When conversations and the approvals happen in the same spot, recording the details back into the CRM is a breeze.”

Tom Forgacs
VP of Sales, Canada, Slack



Amplify productivity by working cross-functionally in Slack

Ideally, sales reps need to rustle up answers to customers' questions quickly, often between meetings or amid a hectic travel schedule. Here are some best practices on how to set up your Slack workspace to stay closely aligned with other teams that your teams rely on for a deal's success.

Have updated pitch decks and sales collateral at your fingertips

In a **#sales-demos** channel, marketing and sales can work together to ensure that everyone's working from the same spec sheet. Avoid version control pandemonium by pinning the most updated documents to the channel so you can keep important information handy.

Share customer feedback for better customer service

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, you can get a better sense of how to prioritize the request.



Arcadio Buendía 10:55 AM

● Feature request: admin notifications

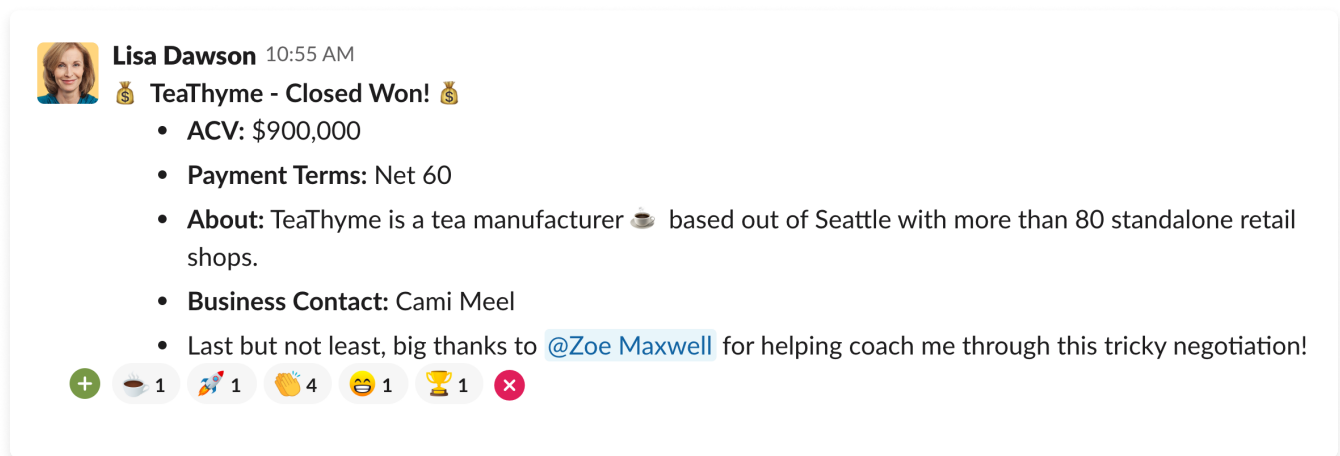
- **Problem statement:** Customer would like to receive notifications whenever their account changes (new members are added, bill balance increases/decreases, etc.)
- **Potential solutions:** Make this an admin preference so they can monitor all account activity. Have it off by default so people don't receive too many notifications.
- **Customer(s):** BigCo, LargeCo

+ 4



Celebrate wins and create an archive

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



Lisa Dawson 10:55 AM

💰 TeaThyme - Closed Won! 💰

- ACV: \$900,000
- Payment Terms: Net 60
- About: TeaThyme is a tea manufacturer 🍵 based out of Seattle with more than 80 standalone retail shops.
- Business Contact: Cami Meel
- Last but not least, big thanks to [@Zoe Maxwell](#) for helping coach me through this tricky negotiation!

+ 🍵 1 🚀 1 🙌 4 😊 1 🏆 1 ❌

“We created a peer-level Slack channel for new sales reps, and now we’re seeing a lot more high-tenure sales reps engage with new teammates. Slack is driving camaraderie and helping with rep development.”

Will Jenkins

Co-Founder and Director of Business Development, MoLo



Shorten deal cycles with Slack's asynchronous innovations

Timing can be everything when landing a deal. But not everyone is working in the same place, or even at the same time. Slack's tools empower your team to get the job done wherever—and whenever—it suits them best.

Selling together with Slack's latest features

Whether you're assembling partners and customers for real-time collaboration or designing a pitch deck asynchronously, Slack has you covered.

Canvas: Account execs can record ideas and action plans in a document that lives on after the call is over, and is shareable with other teammates who may have missed the meeting.

Clips: Leave voice or visual notes asynchronously, to be viewed whenever your colleagues come back online.

Huddles: Quickly hop into audio or video calls inside any channel or message and problem-solve in a few minutes what would have taken you an half-hour to explain via text.

“With Slack, we can quickly collaborate around our system of record: Salesforce. Using the two together, we've cut our sales cycle by 15 to 20% on average.”

Nolan Frazier

Account Executive of Strategic Accounts, Procore



Integrate powerful sales tools with Slack

Bring valuable real-time data from your sales platforms into channels where team discussions are already happening by connecting industry-leading software and custom apps through our [integrations](#). 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. Everyone has quick access to critical information needed to make decisions, resolve issues and respond to new leads—and less juggling between multiple apps and logins means fewer lags in your workday.

Slack integrates with over 2,400 apps, including the tools salespeople rely on every day:

Sales Cloud for Slack: Manage pipeline and automate the push and pull of real-time CRM data from Sales Cloud directly in Slack channels.

Salesloft: Automate custom notifications to a designated Slack channel by setting up keyword triggers inside of Salesloft.

DocuSign: Speed up the contracting process with your partners on legal and finance by using DocuSign eSignature.

Tip

Discover more great sales tools in the [Slack App Directory](#).



Shorten deal cycles with Slack's asynchronous innovations

Grow revenue—and cut costs—with the Sales Cloud and Slack solution

As the economy contracts, sales teams can pull two main levers to keep growing while cutting spend. Productivity, meet efficiency.

Let's face it, inefficiency kills deals, even during the most profitable periods, and sales leaders must root it out relentlessly. Organizational silos keep your team from doing its best work. Often, new-hire onboarding drags at one end while veterans might be working with outdated data at the other.

Say hello to real-time insights at your fingertips with the **Sales Cloud and Slack solution**. By integrating Salesforce with Slack, sales teams can work faster and prevent data and communication silos.

The screenshot shows a Slack workspace for 'Acme-corp' with a channel named '# acct-capricorn-coffee'. The channel contains messages from 'Account Record | Capricorn Coffee' and 'FY23 Account Plan'. A message from 'Zoe Maxwell' updates a 'High-Value Opportunity' for 'Capricorn New Business' with a stage change to 'Negotiating & Mutual Plan' and a close date of '12/15/2022'. The 'Canvas' sidebar on the right displays 'Top FY23 Opportunities' and 'Service Swarms'.

Opportunity	Owner	Close Date	Stage	Next Step
Capricorn Coffee - New Business - \$4.5M	Matt Brewer	2022-12-15	Negotiating & Mutual Plan	CHRO review
Capricorn Coffee - Multi-Year - \$620k	Matt Brewer	2023-01-17	Confirming Value With Power	Program Review with Procurement

This integration becomes the single source of truth that sellers and cross-functional stakeholders need to close deals fast. Up-to-date CRM data pipes directly into the relevant Slack channel, so everyone working on the account can get the contextual information they need at a moment's notice in one centralized workspace. It goes the other way too. By using **slash commands**, AEs can update account details at lightning speed directly within Slack.

This solution helps you stay on top of deals—making sure that your teammates are aligned, everyone is working together efficiently and you're quickly pulling in the right people in to close deals. And the best thing is the solution comes with out-of-the-box templates and best practices from Salesforce and Slack. We've made it easy for anyone to quickly set up, deploy and scale sales processes across their teams.



Amplify productivity by using automations

Think of all the time you spend on tedious admin—entering account info, wrangling sales data and logging client invoices. These days, sales reps spend a whopping **18% of their week** on activities like these.

That's why we try to automate away as much busywork as possible. Slack's custom **workflows** are low- and no-code automations that anyone across the business can build easily. We use them for renewal alerts, lead tracking, support requests, capturing essential context in Sales Cloud and more. Approvals are one area where automated workflows really shine. Whether the signature needs to come from finance, legal or a sales manager, we've consistently logged **70% faster approval cycles** by using our custom ApprovalsBot.

The screenshot displays a Slack workspace for 'Omega Sales'. The main channel is '# dsr-cumulus'. A message from 'ApprovalsBot - Deals' (APP) at 11:30 AM states: '@harry is requesting approval for Cumulus - Enterprise - Q32022'. Below the message, the workflow is visualized as a sequence of steps: L1 Sales, L2 Sales, L3 Sales, L4 Sales, Sales Ops, Legal, Rev Rec, and CFO/CEO. A 'Proposed Structure' table is shown with the following details:

Close Date:	2022-10-15
ACV (Churn):	\$500,000
Billings:	\$350,000
Total Contract Value (TC):	\$4,000,000
Subscription Term:	18
Max Implied Discount:	40
Payment Terms:	Net 20
Payment Frequency:	Standard

The 'ApprovalsBot - Deals' message also includes an 'Asks & Justification' section with the text 'What's changed?'. A thread of replies is visible on the right, showing approvals from users like @goshi (LEGAL), @divitali (REV_REC), and @stefano (CFO_CEO). The left sidebar shows the workspace navigation menu with 'dsr-cumulus' selected.



Amplify productivity by using automations

Intuitive workflows like this have helped our reps get **26% of their time back**. By cutting out mundane tasks and having bots do them auto-magically, you can spend more of your time doing what you do best: selling.

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.



Bring the outside in with Slack Connect

Have you ever wished you could reach external partners without leaving your own workspace?

We launched **Slack Connect** so that you and your customers can work in the same Slack instance, allowing you to field their questions quickly and build deeper, more direct relationships that deliver value to your customers.

Build on conversations with customers in Slack Connect channels by adding your partners—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.

Not only does this help build rapport with customers, it helps create trust by getting 43% faster responses from customers, vendors and service providers, according to a **2021 IDC MarketScape assessment**. Together, it all adds up to **a deal cycle that moves four times as fast**, thanks to Slack Connect.

“Historically, the gold standard of a deep relationship in sales was getting the person on text. Now the gold standard is getting them into a Slack channel.”

Jeanne DeWitt Grosser

Head of Americas Revenue and Growth, Stripe

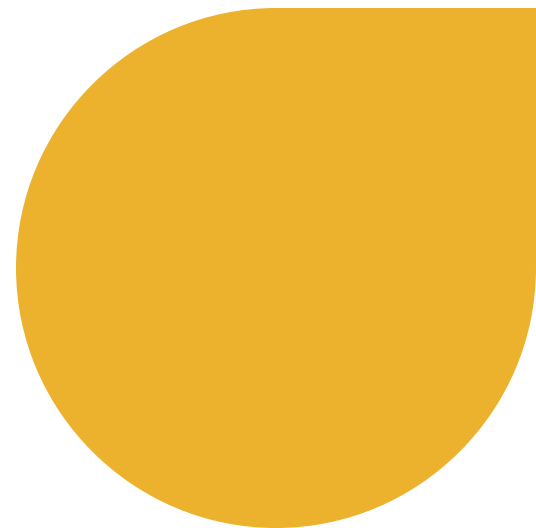


How you can take action now

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.

1. **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.
2. **Invite a customer to Slack Connect:** Start small with your direct contact on one account and see firsthand how much friction you can eliminate by jumping in a huddle together or leaving a clip to unpack the particulars of a deal.
3. **Give some apps a whirl:** Connect a few key tools that you use often to your team's workspace and try sharing and updating data directly in Slack.

Want to bring Slack to your workplace? Get pricing information and explore use cases for your organization by [contacting our sales team](#).





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