

# The Slack handbook for sales teams

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



# Table of contents

<b>Introduction</b>	<b>3</b>
<b>Enable faster team selling with account channels</b>	<b>4</b>
How to get the most out of channels	5
<b>Amplify productivity by working cross-functionally in Slack</b>	<b>6</b>
Have updated pitch decks and sales collateral at your fingertips	6
Share customer feedback for better customer service	6
Celebrate wins and create an archive	7
<b>Shorten deal cycles with Slack's asynchronous innovations</b>	<b>8</b>
Selling together with Slack's latest features	8
<b>Amplify productivity by using automations</b>	<b>11</b>
<b>Bring the outside in with Slack Connect</b>	<b>13</b>
How you can take action now	14



# Introduction

Today's sales teams need to maximise 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.<sup>1</sup> Instead, they're logging client data, tracking down the name of their customer's favourite 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 that you already use and deploying various Slack features to surface information in a jiffy so that 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 that you regularly use

<sup>1</sup> '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 organisations are adapting quickly to this landscape, equipping 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 organise **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 organisation. If you commit to doing most of your work in public channels, it helps new account teammates to get the context that they need to quickly move a deal forwards – such as the deal history, insights about the customer or the status of a customer request.

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.

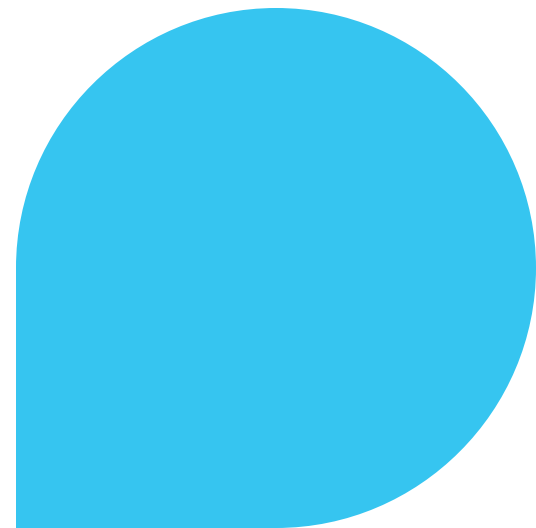


## How to get the most out of channels

- Organise 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 that 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 that 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 that they need to get the deal across the finishing line.
- Create 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 frequently updated documents to the channel so that 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 in their minds. When others react to the message with an emoji, you can get a better sense of how to prioritise the request.



**Will Rodrigues** 10:55 AM

● Feature request: admin notifications

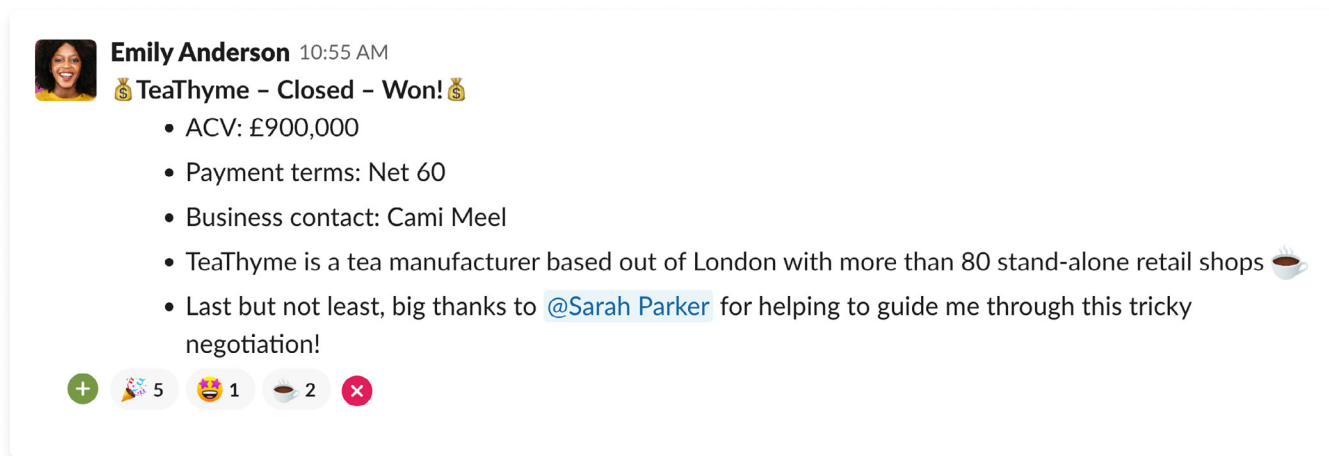
- **Problem statement:** Customer would like to receive notifications whenever their account changes (when new members are added, bill balance increases/decreases, etc.)
- **Potential solutions:** Make this an admin preference so that they can monitor all account activity. Have it off by default so that 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, such as the size of the deal and the payment terms, that becomes instantly searchable.



**Emily Anderson** 10:55 AM  
💰 TeaThyme - Closed - Won! 💰

- ACV: £900,000
- Payment terms: Net 60
- Business contact: Cami Meel
- TeaThyme is a tea manufacturer based out of London with more than 80 stand-alone retail shops ☕
- Last but not least, big thanks to [@Sarah Parker](#) for helping to guide me through this tricky negotiation!

+ 🎉 5 😂 1 ☕ 2 ❌

*'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 take action on 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 half an 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 that 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 the 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 that salespeople rely on every day:

**Sales Cloud for Slack:** Manage pipelines 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 within Salesloft.

**DocuSign:** Speed up the contracting process with your partners on legal and finance teams 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 their spending. Productivity, meet efficiency.

Let's face it: inefficiency kills deals, even during the most profitable periods, and sales leaders must root it out relentlessly. Organisational silos keep your team from doing its best work. Often, new-hire onboarding drags at one end, while veteran employees 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 displays a Slack interface for a workspace named 'A1 Company Ltd.'. The main channel is '# acct-capricorn-coffee'. The channel content includes a message about an 'Account record | Capricorn Coffee' and a 'High-value opportunity update' for 'Capricorn Coffee - New business' with a stage of 'Exploration' and an amount of '£4.5M'. The update is attributed to '@Emily Anderson' and includes next steps for an 'exec-to-exec meeting'. The interface also features a 'Canvas' sidebar on the right with 'Top FY23 opportunities' and 'Service swarms' sections. The 'Top FY23 opportunities' section lists two opportunities: 'Capricorn Coffee - New business - £4.5M' and 'Capricorn Coffee - Multi-year - £620K', both owned by 'Matt Brewer'. The 'Service swarms' section shows a 'Service Cloud for Slack' swarm for case '00005477'.

This integration becomes the single source of truth that sellers and cross-functional stakeholders need to close deals quickly. Up-to-date CRM data pipes directly into the relevant Slack channel, so everyone working on the account can get the contextual information that they need at a moment's notice in one centralised 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 to 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 to close deals. And the best thing is that 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 that 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 channel named 'dsr-cumulus'. A message from 'ApprovalsBot - Deals' (sent 11:30 AM) is the focus. The message content includes:

- Approvals required:** A horizontal flow of approval steps: L1 Sales, L2 Sales, L3 Sales, L4 Sales, Sales Ops, Legal, Rev Rec, and CFO/CEO.
- Proposed structure:** A table of deal details:

Close date:	15/10/2022
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
- Asks and justification:** A section for providing context and justification for the approval request.

The right-hand side of the screenshot shows a 'Thread' view of the message. It contains several replies:

- Jagdeep Das** (14 minutes ago): "@toby @lisa is there anything that we can do to get creative to help resolve this? Could we just start a huddle very quickly?"
- Emily Anderson** (13 minutes ago): "Thanks team! As discussed live: Credit calculation has been corrected, was previously 17 days off. Language that @lisa provided has been updated to reflect the correct credits."
- ApprovalsBot - Deals** (9 minutes ago): "@lisa approved LEGAL"
- Lisa Amos** (7 minutes ago): "@toby Approving and added some additional language to the QST that matches the parent oppty"
- ApprovalsBot - Deals** (3 minutes ago): "@enowak approved REV\_REC"
- ApprovalsBot - Deals** (<1 minute ago): "@jagdeep approved CFO\_CEO"



## Amplify productivity by using automations

Intuitive workflows like this have helped our reps to 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 that 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 that they can continue to discuss customer needs and opportunities for renewals, upgrades and other negotiations.

Not only does this help to build rapport with customers, it also helps to 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

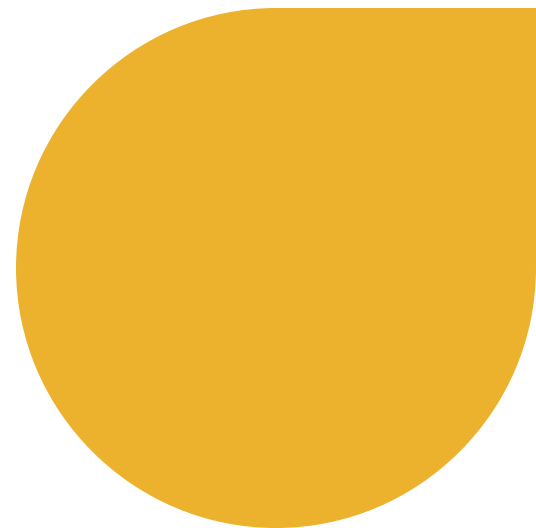


## How you can take action now

Here are a few things that 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 that you periodically audit your channel list, archiving ones that are no longer relevant or useful. Take a look at [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 starting 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 organisation by [contacting our sales team](#).





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.