

22 ways to automate work in Slack

No code? No problem. Get inspired by how our customers are using Workflow Builder now



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Introduction

Imagine a workspace where anyone, including those without coding skills, can accelerate their work by automating repetitive tasks. Where reminders and updates aren't just punctual but predictive. And where the collective cognitive load is dramatically reduced.

This isn't the workspace of the future; it's the here and now with Slack. Workflow Builder is a no-code tool that lets you streamline processes, eliminate manual errors, reduce context switching, and free up valuable human capital to focus on what truly matters: innovation and growth.

Workflows in Slack can be as simple or as complex as you'd like, and they can even be connected to the other apps and services you use to get work done. Best of all, it's a tool that anyone, regardless of their technical background, can deploy with just a few clicks.

Nearly 1 million Slack users have created time-saving workflows that empower everyone to automate without having to write a single line of code. Sony Interactive Entertainment's network operations team saves 400 hours a year through Workflow Builder; Credit Union 1 is 20% more efficient thanks to a workflow that automates customer handoffs; and Canva's finance team saves nearly 64 hours a week with asynchronous standup meetings. Workflow Builder is a win-win, lightening the load for the IT departments that are usually responsible for creating efficient work processes.

2.75 million

workflows run every day by our customers

80%

of those who use Workflow Builder are in non-technical positions

35% increase

in time savings from automations after using Slack are reported by customers

Source: Salesforce, FY24 Customer Success Metrics Report, 2023

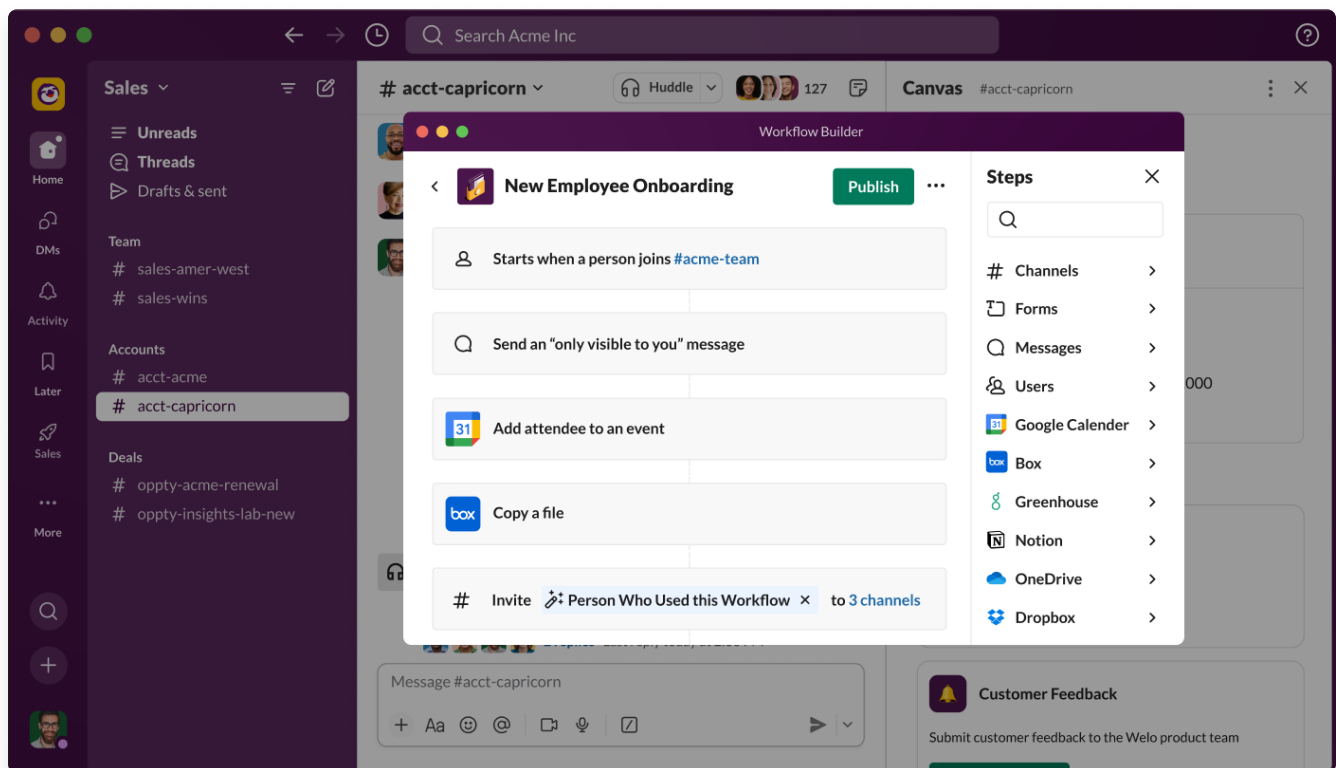
In this e-book, you'll learn how we—and some of our most recognizable customers—are using Workflow Builder to automate everything from administrative approvals to closing deals faster.



What is Workflow Builder?

Workflow Builder is a tool that helps you automate everything from routine tasks to complex processes in Slack. Workflows simplify routine processes so you can spend less time on tedious tasks. They can be as simple or as complex as you'd like, and they can even be **connected to other apps and tools** you use to get work done.

Workflows have two main components: a trigger (how the workflow will start) and steps (the actions you want the workflow to take).



Types of workflows you can create

If you can dream it, you can build it. Workflows are popularly used for:

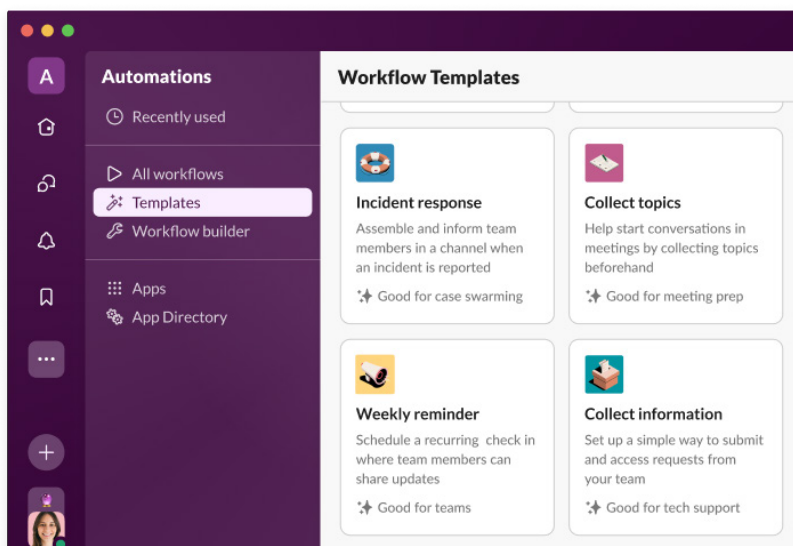
- Collecting information
- Sending reminders
- Managing requests and approvals
- Creating support tickets
- Updating sales accounts
- Flagging engineering bugs
- And so much more

Our [Build a workflow](#) tutorial is a great place to start, but if you're looking for more detailed instructions, you'll find them in [Create a new workflow in Slack](#).

Where to find workflow templates

You can find all kinds of examples and suggestions in Workflow Builder. Follow these steps to get there:

1. From your desktop, click the ellipsis (“...”) on your sidebar
2. Click “Automations”
3. Click “Templates”



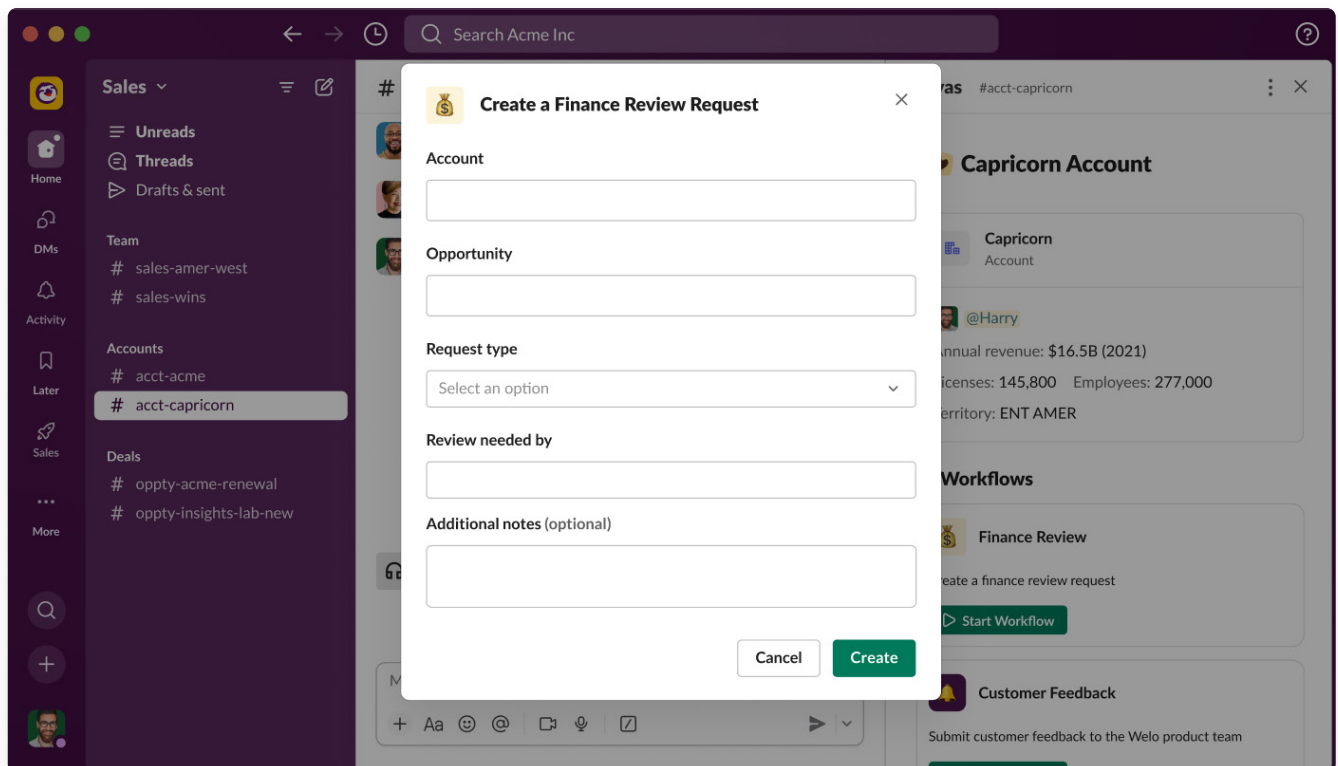
Workflows for sales

Close deals faster through automated team selling

It takes a village—and alignment—to close those big deals. [Salesforce's sales operations teams use Workflow Builder](#) to move work along by keeping sellers informed about where each deal stands, empowering everyone to approach sales proactively. Collectively, they're saving more than 800 hours a week through automated workflows.

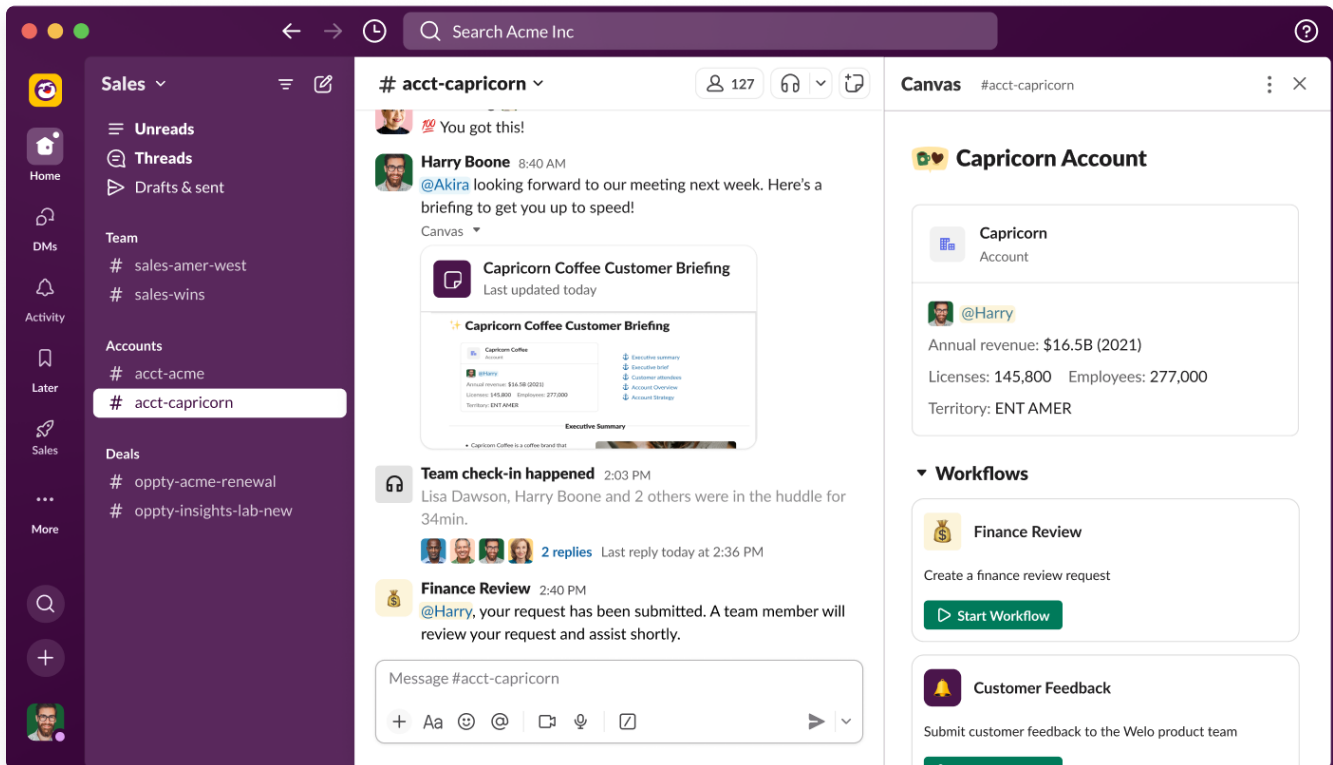
[Salesforce](#) uses workflows to automatically remind reps to share:

- Deal win reports
- Pipeline reports
- Weekly status reports
- Monthly deal audits
- Weekly time card updates
- Monthly expense report submissions



Workflows for sales

Workflow Builder seamlessly works with the other tools integrated into Slack, saving reps time they would otherwise spend toggling between platforms. And with **more than 65 connectors**, you can allow workflows to take action in another tool—like create a row in a Google Sheet or add a task to your project management tracker in Asana—making it easy to automate work that extends across your tools, without leaving Slack.



Streamline cross-functional decision-making

The lending process involves many different teams, documents and systems, which can make it difficult to keep everyone aligned and on track to meet tight deadlines. **Provide**, a digital finance company, **relies on Slack channels** to work together to improve customer experiences. Team members can track statuses, review files and have access to the same context through deal-specific channels.

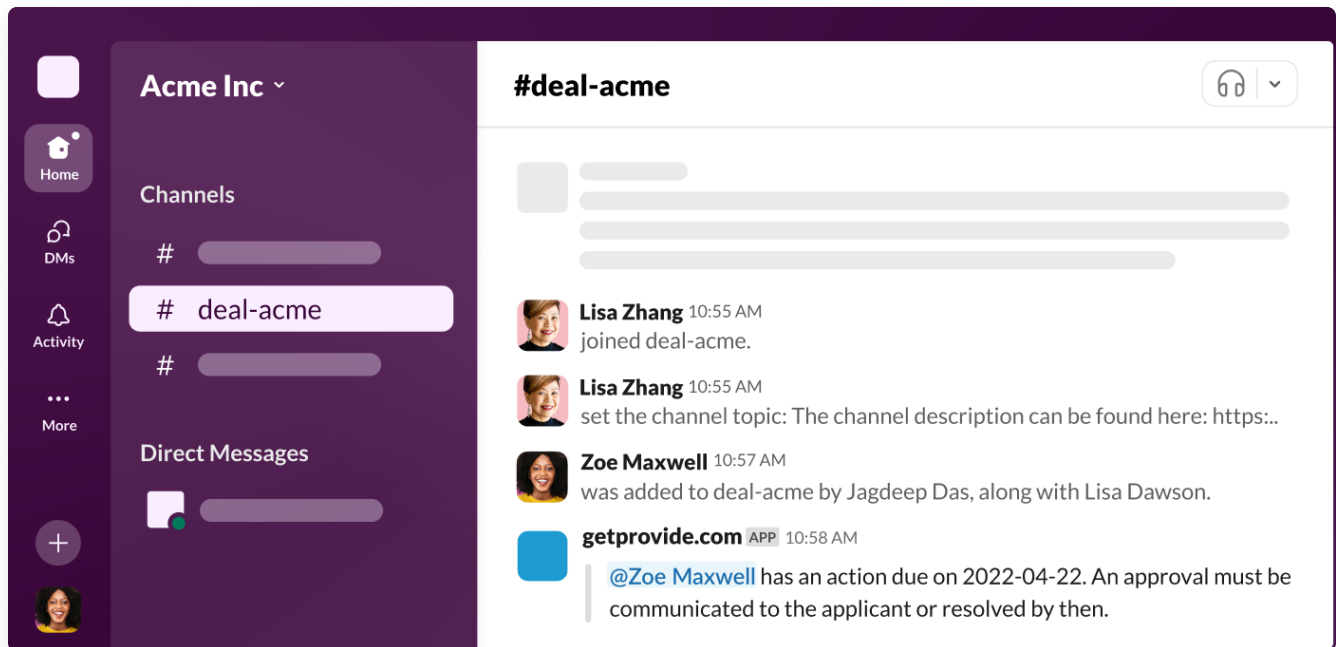
Workflow Builder automatically updates the channels as deals move through the funding process, creating one source of truth for everyone involved.



Workflows for sales

“Whether you’re an underwriter, loan operations specialist, inside salesperson, closing officer or any other operational contributor, you’re automatically added to the deal channels you’re supposed to be in,” says Andrew Bennett, Provide’s CEO. “This allows us to make quick, accurate, well-documented decisions when issues inevitably come up in the course of a deal. It would be much harder to build that one source of truth if we were relying solely on email or even the newsfeed in our software—which, by the way, we’ve configured to automatically catalog messages pinned to the deal’s Slack channel.”

According to Bennett, these automations save the company around 10,000 hours of work each year. Those hours back mean more than just improved internal efficiencies; it means the ability to handle a larger pipeline, with happier employees and an improved customer experience.



Workflows for marketing

Drive team alignment and speed up approvals

Speed matters in business, and this is especially true for marketing teams operating in competitive environments. That's why [Salesforce relies on Workflow Builder](#) to automate the approval process during marketing campaign planning.

Approval workflows gather and automatically dispatch all necessary requested information so that stakeholders can swiftly review summaries and sign off in minutes. Centralized files and documents in Slack workflows keep work moving forward. Because Slack's platform is easily [searchable](#), workflows also help inform teams how to replicate similar requests. The information in the workflows and their threads provide contextual information about the requests, including the people involved in the decision-making and the turnaround time.

"I no longer get lost when looking for information. Additionally, approvals are no longer delayed, as they were before we adopted Slack," says Vikram Mediratta, Salesforce's senior director of corporate marketing. "It's much easier to be in one system. Summaries are clear, clean, actionable—and workflows allow me to be super-efficient whether I'm using Slack on my laptop or on my phone while on the road."

Start Approval

Approval Name (so you can find it later)

Give this approval a recognizable name...

What should be approved?

Type a message to describe what you want approved...

Who should approve this?

Select users

How many approvers must sign off to consider this approved?

Every approver

Where should we post this approval?

test

Cancel Get Approval



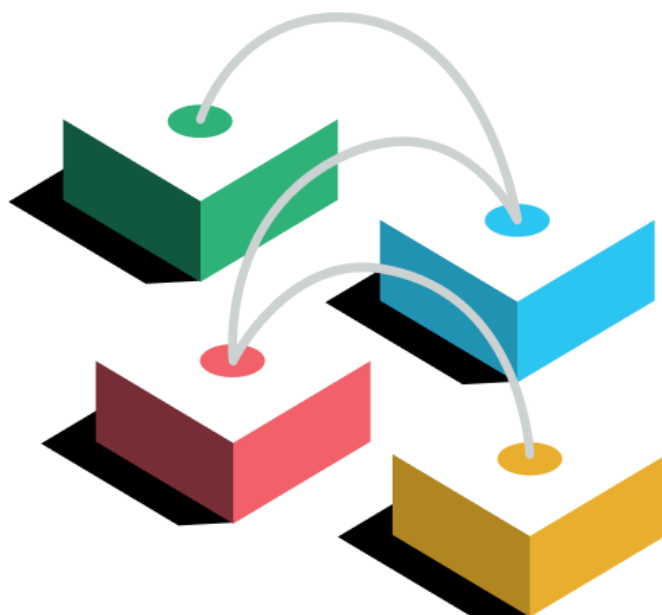
Approve event requests and track their impact

Mixology, a retail chain for women’s designer clothing, hosts fundraisers, pop-ups and trunk shows at its stores to bring in new customers and raise money for the charities and nonprofits it supports. Because there are so many events, the company needed a way to organize the process of managing the partners and logistics involved.

To address this, the Mixology executive team created a workflow to request events. The workflow prompts store teams for the necessary information, such as the store location, event type, date and time. Once a request is submitted, it goes to a private channel for review and approval. The workflow then sends a specific emoji to the requesting store to let them know whether the event was approved. This information is automatically recorded in the company’s database so the team can keep track of all events and their impact throughout the year.

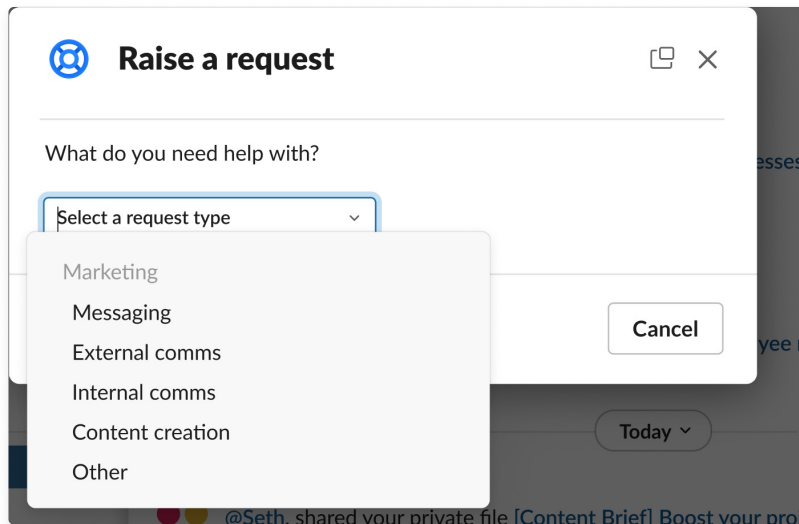
Answer questions and provide resources for product marketers

Have you ever found yourself with a marketing-related question but aren’t sure who to ask? **Salesforce uses a handy “help” workflow** that allows employees to submit help tickets to a designated channel, where the right subject-matter expert can provide a solution. The information collected and shared in each workflow remains visible in the channel and is archived in search, helping unblock teammates in the future.



Workflows for marketing

“When I’ve been the person fielding questions, I appreciate how we can track questions and responses in channels to discover trends,” says Aaron Kelley, Salesforce’s senior director of product marketing. “That visibility shows us where there are opportunities for further enablement so that we are focusing on the topic where our stakeholders need the most clarity.”



Erin Oles, the senior vice president of strategic events at Salesforce, manages a team responsible for **Dreamforce**, Salesforce’s biggest event of the year. Her team also uses workflows to organize and triage participant questions.

“One of the best things you can do as a leader is enable your team to move fast,” Oles says. “Slack helps me remove barriers and get my team the information they need quickly while boosting visibility across the organization. That kind of visibility helps you stay accountable and offer clear direction the whole team can get behind.”



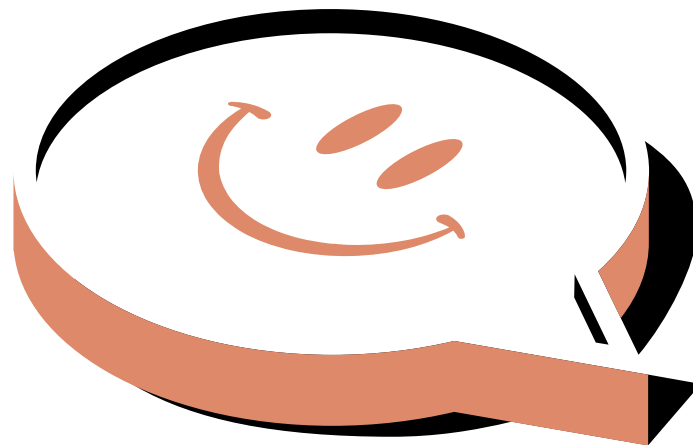
Workflows for customer service

Creating better customer experiences through real-time data

Credit Union 1 in Alaska set itself apart in a competitive banking market by providing better, faster service for its members.

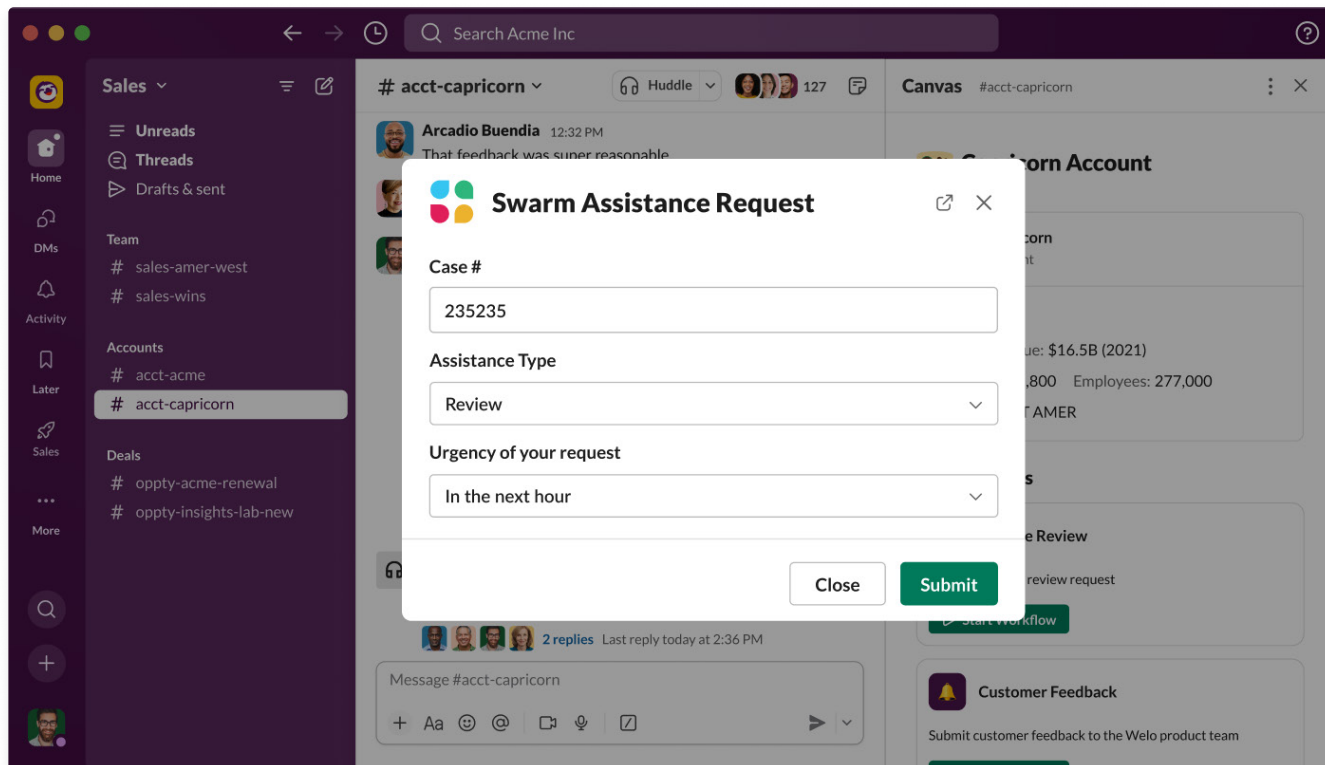
Its team of tellers uses a workflow to send relationship managers leads and referrals as credit union members come into branches and discuss their needs. There's also a workflow that routes member follow-ups to specialists who can service those requests, such as taking out an auto loan or adding an authorized signer to an account. The workflow prompts employees to input the member's name, phone number, request type, status and any other key details. Then the specialist who picks up the request will know exactly what the member needs so they can offer more timely support.

“Workflows help standardize our communication,” says CEO Mark Burgess. “Imagine we have 150 employees in our branches—if they're each making member appointments in their own way, it would take forever, and we would miss valuable information. With Workflow Builder, we're able to automate this process, which has resulted in a 20% increase in time saved.”



Swarm on customer experience problems

Slack’s customer experience (CE) team helps thousands of users each day. For complex issues, that often means consulting subject-matter experts before devising a solution.



Customers need their problems resolved as soon as possible, so speed and agility in this space are paramount. Our CE team built a workflow that reroutes requests into dedicated channels filled with specialized engineers.

The properly formatted results post to channels for that group, and experts triage from there. When someone “claims” the issue by clicking a button, the CE agent who posted it gets a message telling them who is investigating the issue.



Find experts who can answer questions

Slack enables support pods to resolve major issues quickly through the use of Salesforce's Expert Finder tool in [Service Cloud](#). Expert Finder is embedded in the Slack swarming workflow and helps connect service teams automatically to the right experts based on skills, availability and capacity. And with the [field service mobile app](#), field service technicians have all the information they need to deliver complete service from anywhere.

Here's how it works: If an engineer needs help on a case, they initiate a request in Service Cloud and select the Expert Finder tool when prompted. The swarm is created and the workflow automatically brings in the appropriate engineers, pods and cross-functional subject-matter experts through Slack channels to address the case.

Slack's integration with Service Cloud reduces context switching between the two tools because conversations about the case can happen in the Service Cloud Console or Slack interchangeably. Users can quickly add information discussed in Slack to the case details in Salesforce so important context doesn't get lost.

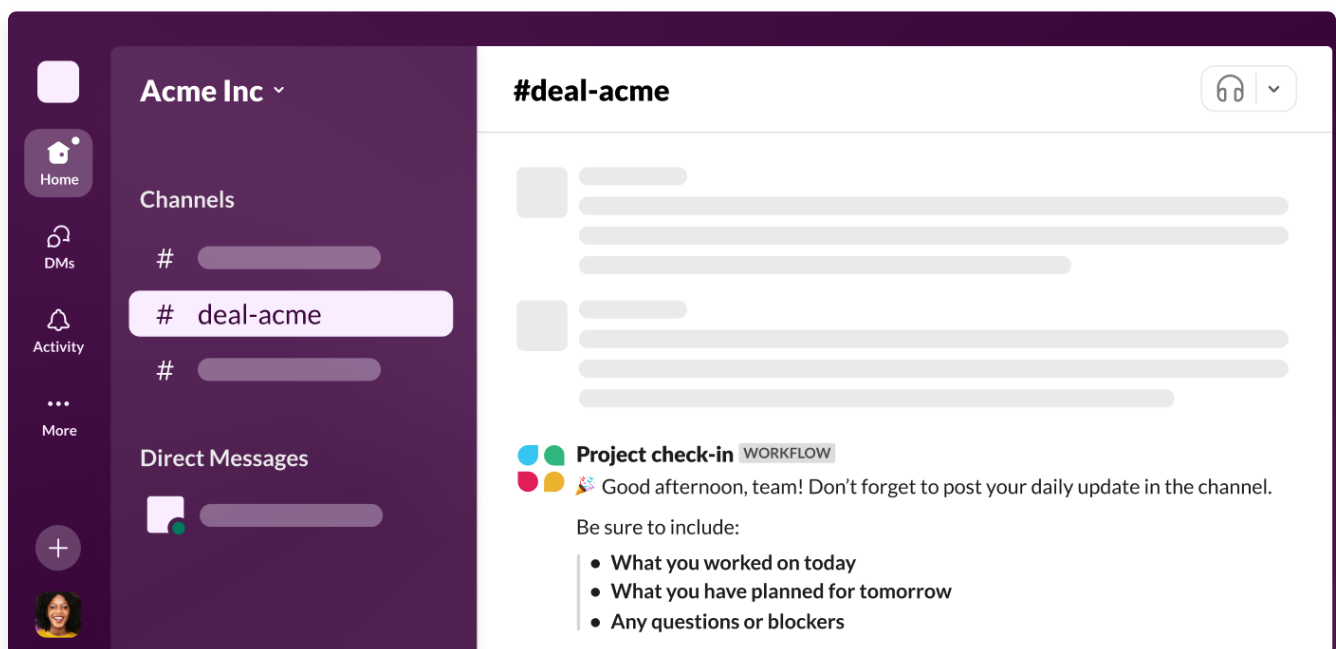
When a case is resolved, users can create a Salesforce [knowledge article](#) in Slack based on the swarm conversation so lessons from the case can be easily referenced when another person encounters a similar issue.



Workflows for engineering

Conduct daily standups or weekly reflections

Status update meetings are useful for project management but can be disruptive to individuals. Instead of breaking up our engineering team's flow to gather for a standup, everyone posts their updates in Slack.



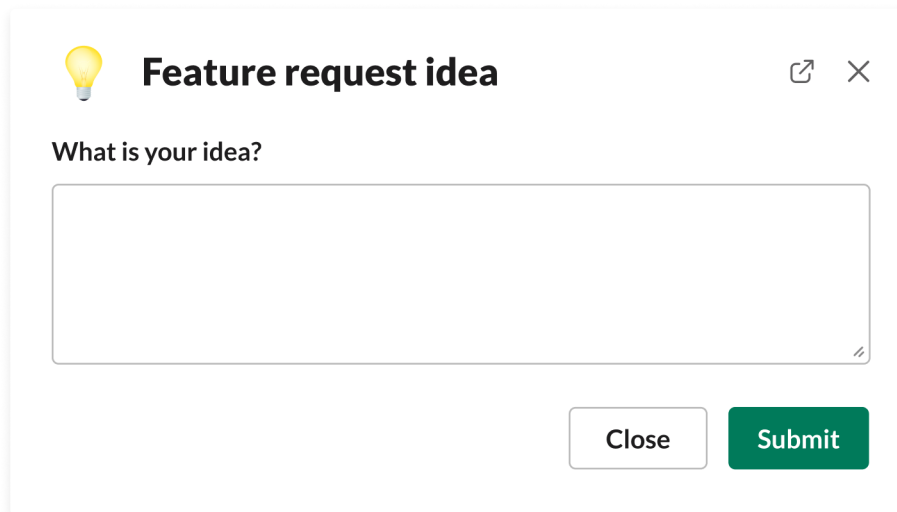
They create daily or weekly reminders that fire into the team's channel and either ask everyone to post their replies as a thread to that message or create a quick form to focus the team's answers on a few key questions and ratings.



Build a friction-free feedback form

Bright ideas can come from any part of the company—not just developers—so we've made it as easy as possible to collect them.

The engineering team uses Workflow Builder to create a form for any channel where teammates can organically discuss ideas or potential bugs. The form is simple, just a quick question or two. From there, they automatically formalize the best ideas or showstopper problems into Jira tickets or Asana tasks.



The image shows a screenshot of a 'Feature request idea' form. At the top left is a yellow lightbulb icon. To its right is the title 'Feature request idea' in bold black text. In the top right corner, there are two small icons: a share icon and a close icon (an 'X'). Below the title is the question 'What is your idea?' in a standard black font. Underneath the question is a large, empty rectangular text input field with a thin border and a small cursor icon at the bottom right. At the bottom of the form, there are two buttons: a white button with a grey border labeled 'Close' and a solid green button labeled 'Submit'.

Gather votes from your team (for example, for a hackathon)

One of our customers found a particularly clever way to use Workflow Builder: organizing an internal hackathon and collecting votes for winners using Slack.

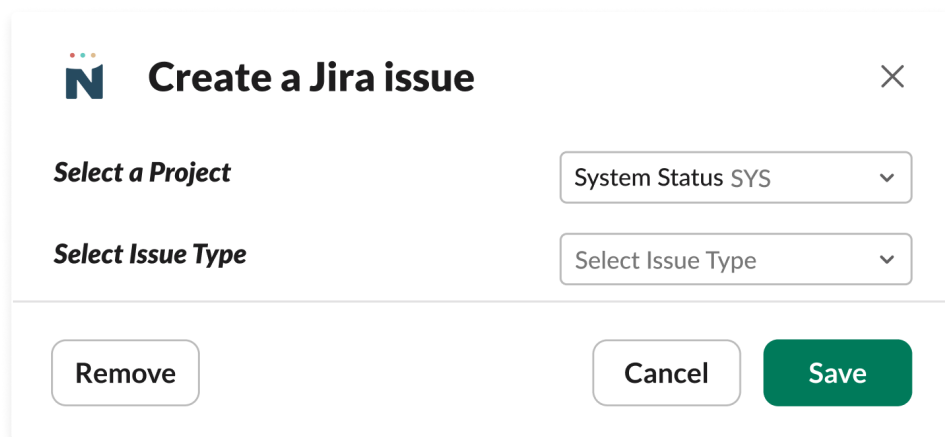
The voting process starts with the hackathon organizer posting instructions in the developer channel, letting members know to use a specific emoji to start the voting workflow. Those who react with the emoji automatically receive a voting form through a Slack message. Results are then downloaded as a CSV file to quickly tally up votes.



Flag and track a new bug report

Like a novel feature idea, new bugs can be spotted by customers and coworkers alike. This is why we empower everyone at Slack to create new issues and track resolutions without even leaving Slack.

First, the engineering team sets up a dedicated channel, like #ios-bugs. Then they publish a standardized bug reporting workflow for the channel. From there, they're able to add "Create Jira issue" as an automated step in the bug reporting process.



Create a Jira issue [X]

Select a Project: System Status SYS [v]

Select Issue Type: Select Issue Type [v]

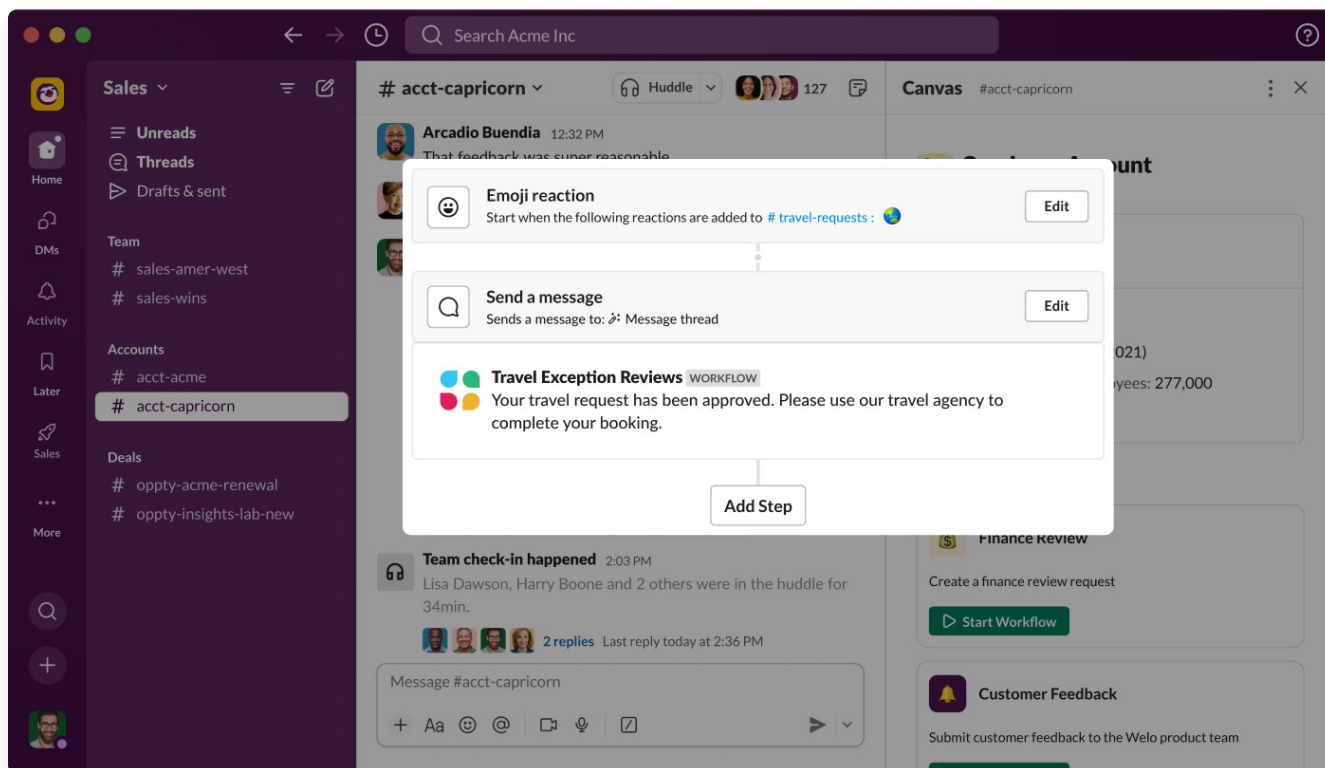
[Remove] [Cancel] [Save]

Not a Jira user? No problem. Workflow Builder [integrates](#) with many popular bug-tracking tools, or you can simply keep track of issues in your Slack channel.



Launch a task with emoji

Workflows can be triggered in multiple ways, even with an emoji. When emoji are used to “claim” requests, you can automatically fire off a workflow that sends the claimant a form. Here’s an example for a travel request:

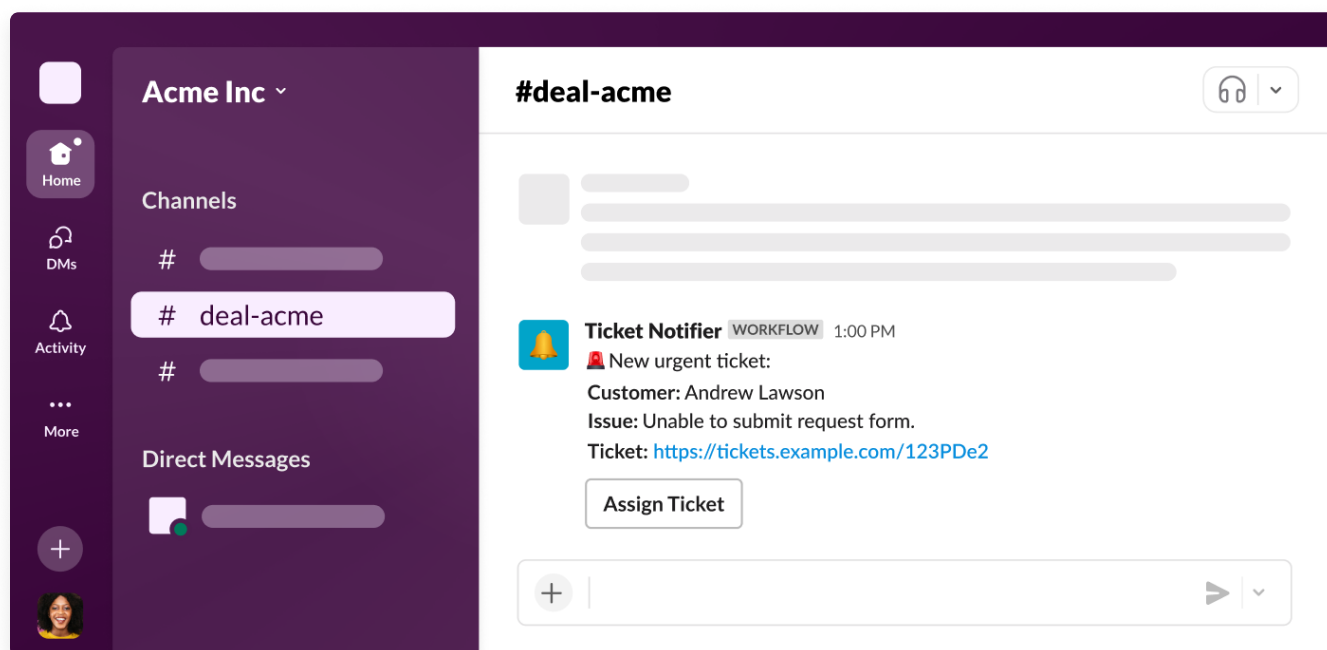


Stringing these triggers together means you can build some pretty complex apps for your team in just a few minutes in Workflow Builder.



Use webhooks for apps that lack a Slack integration

We've heard from several software teams using cloud services to manage their work that they've chosen a vendor that doesn't yet have an easy way to send updates into Slack. But those services often have webhooks, and when they do, you can **use a workflow to manage incoming messages** from your servers, systems and hosts. Use it to get alerts when a service goes down, or for updates when a status changes in another system.



Workflows for IT

Search and destroy bugs

Roku uses Slack's Workflow Builder to create no-code workflows that automate everything from requesting maintenance to reporting technical bugs to onboarding employees.

When a new hire joins the team, an orientation workflow cycles that person through steps on how to get started and provides them with critical resources and information about their job.

Workflows are also used to report technical bugs to engineers automatically. "I have a Roku television, and if I have an error with it, I can report it by opening up Slack on my phone and hitting 'Submit a bug,'" says Tristan Cary, a senior enterprise applications manager at Roku. "The workflow will trigger a ticket that alerts our engineers to look at the bug and see what's going on with it."

Standardize data collection

Incident resolution is all about speed, and any inefficiencies can slow down the process. That's why the online home-furnishings company **Wayfair manages inventory issues** through Slack and Workflow Builder.

Like many Slack customers, Wayfair uses a Slack channel to collect incident reports. Inventory stakeholders, a group of roughly 50 people who manage inventory across the entire site, can launch a workflow to report issues that are often extremely time-sensitive. Once the issue is submitted, a message is automatically sent to the channel, notifying IT teammates on call about the problem.

But here's where the real magic happens. Wayfair also implemented a workflow that allows the IT team to act on these messages by simply responding with a specific emoji. This triggers an automated workflow that updates a connected Google spreadsheet and compiles all relevant data from the Slack channel. As a result, the company has a centralized and easily accessible Google Sheet with direct links to each Slack report, eliminating the need to scroll and search through the channel to piece information together.

These simple automations save the team two hours a week. With Workflow Builder, Wayfair reduces manual searching, ensures consistent reporting, and provides a seamless experience for the organization.



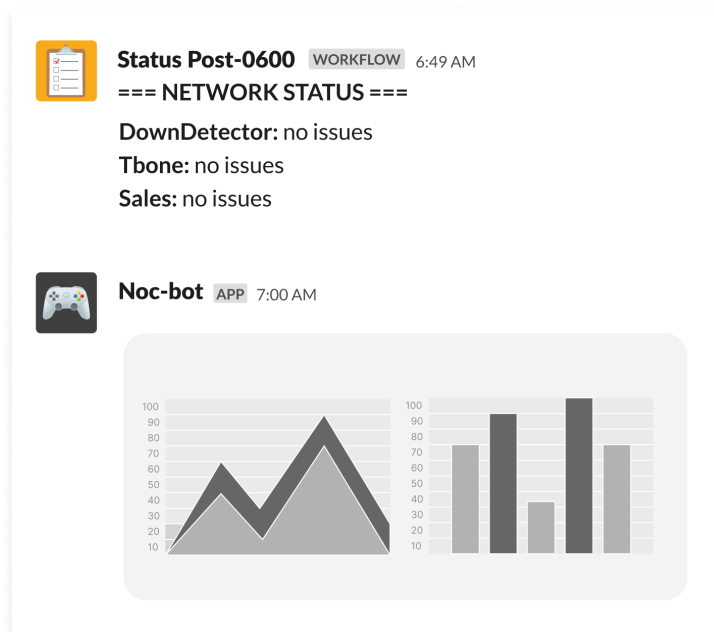
Maintain 24/7 global network operations

Speed is of the essence when you're maintaining network operations for a global gaming platform, and any little bit that can be automated helps. That's why **Sony Interactive Entertainment** has built 650 workflows to help manage a Slack channel supporting over 2,000 PlayStation engineers around the world.

For example, the company's Network Operations Center team created a workflow that triggers an automated response to frequently asked questions, shaving a critical minute off requests. Another automated workflow sends network status reports to the channel every three hours, around the clock, keeping executive stakeholders informed of network status without having to leave Slack.

"Slack plays a pivotal role in driving our efficiencies for how our team can better work to support our engineers and run our network operations digitally," says Nick Gratton, the senior manager of the Network Operations Center. "It helps us maintain PlayStation network performance 24/7, which translates to better player experiences. In our field, every second counts, and being able to easily automate so many of our processes with Slack has saved us at least, on average, 400 hours a year."

"Thanks to integrations with core apps such as ServiceNow, Jira, Jenkins and BigPanda," he says, "the team can easily push relevant data to the right people and align in threads for faster, more informed decision-making."



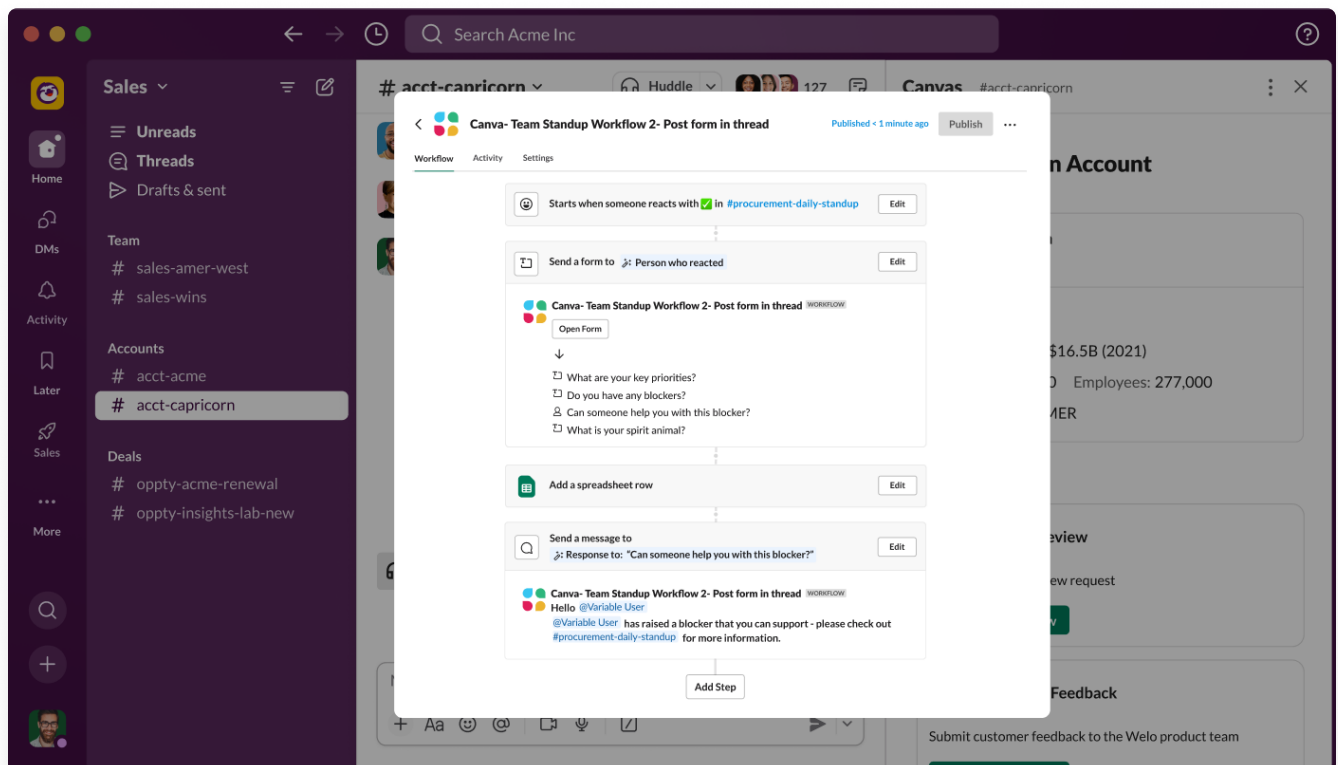
Workflows for all

Align your team regardless of time zones or work hours

Canva, the online graphic design platform, relies on workflows to cut down on meetings by sharing status updates asynchronously.

Before integrating Workflow Builder, **Canva's finance team** spent an average of 1.5 hours per week in standups, adding up to 67.5 hours per week across the team.

For a rapidly growing team juggling multiple priorities and time zones, they needed a way to have more asynchronous conversations and decision-making while spending more of their time reaching their “crazy big goals.” Canva's solution? **Pre-built workflows** in Slack.



Workflows for all

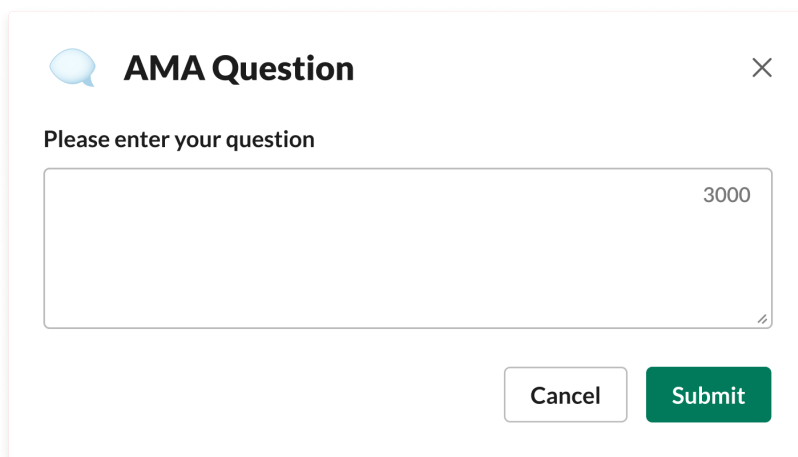
“With Workflow Builder, the Finance team now spends five minutes per week updating their status,” says Chantal Plank, who works in procurement operations at Canva. “The total time savings per week is 63.75 hours across the team, which we’re able to spend focusing on the impactful projects that add value for our team and community around the globe.”

With Workflow Builder, Canva employees spend less time in meetings and more time focusing on meaningful work, context sharing and team bonding. The result? Engaged, productive and efficient teams, cross-functional partnerships that can tackle problems together, and less context switching thanks to app integrations and in-channel communications.

Run Q&As with employees

At Slack, one of the things we’re proudest of is the engagement and enthusiasm at our monthly all-hands meetings. We support this participation by making it as easy as possible for employees to get involved and ask questions. With offices around the world and many employees working remotely, opening the floor to questions is a little more complicated than simply passing a microphone around.

Instead, we ask curious crowd members to join the #all-hands-and-events channel, where they can click the ⚡ workflow button at the top of the channel to trigger the “I have a question” workflow. This pops up the question submission form:



The image shows a Slack modal window titled "AMA Question" with a close button (X) in the top right corner. Below the title is a text input field with the placeholder text "Please enter your question". To the right of the input field, the character count "3000" is displayed. At the bottom of the modal, there are two buttons: a "Cancel" button and a green "Submit" button.

These submissions go into a private channel where our internal communications team prioritizes them and assigns a teammate to ask them live on the person’s behalf. The result is an open forum inclusive of remote offices, remote team members and in-person introverts alike.



Streamline legal reviews

Before we publish any marketing materials or other communications (like this e-book!), Slack’s legal team likes to catch potential legal issues.

With Workflow Builder, the legal team created a simple review process that collects and standardizes requests and also circulates key reminders and speeds up approvals.

Content Legal Review 📄 ✕

Title of Content

Link to Content

Potential issues you want to proactively flag?

Audience for the content?

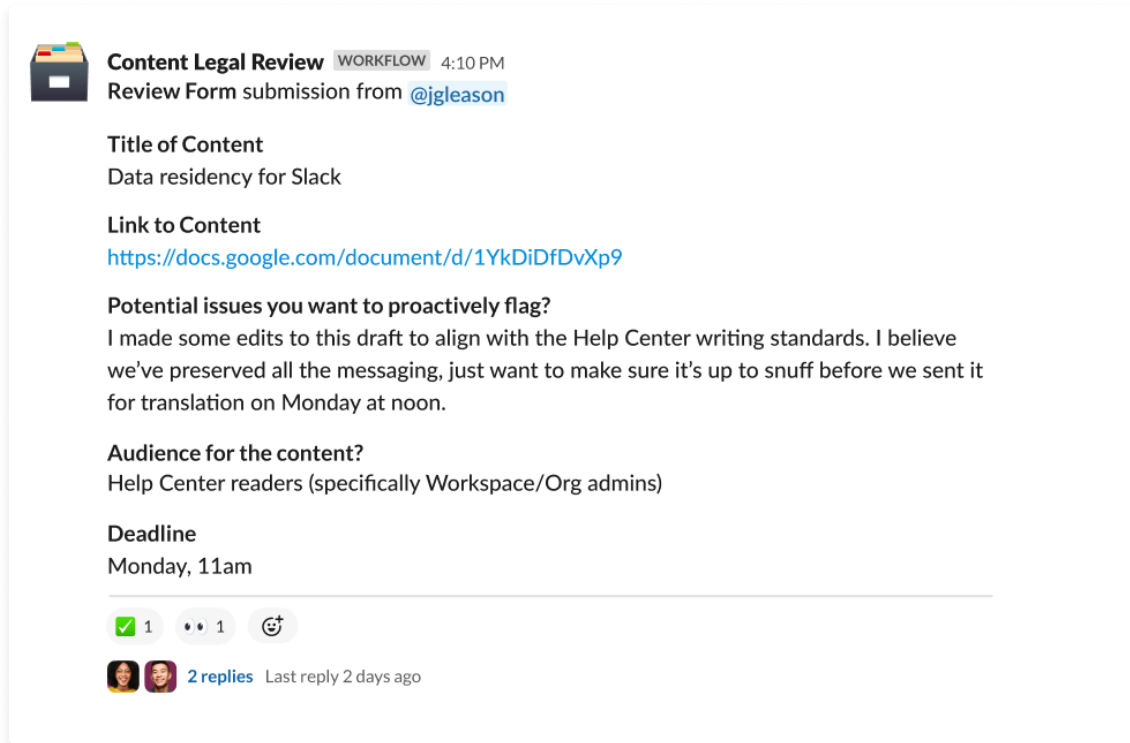
Deadline

The form above launches from a dedicated **#content-legal-review** channel, with the results automatically posted in the channel for wider visibility.

Simultaneously, the requester receives an important direct message that reminds them of some common issues that get flagged, so they can proactively make a first attempt at necessary edits before the legal team reviews.



Workflows for all



Content Legal Review WORKFLOW 4:10 PM
Review Form submission from @jgleason

Title of Content
Data residency for Slack


Link to Content
<https://docs.google.com/document/d/1YkDiDfDvXp9>

Potential issues you want to proactively flag?
I made some edits to this draft to align with the Help Center writing standards. I believe we've preserved all the messaging, just want to make sure it's up to snuff before we sent it for translation on Monday at noon.

Audience for the content?
Help Center readers (specifically Workspace/Org admins)

Deadline
Monday, 11am

👍 1 🗨️ 1 😊

 2 replies Last reply 2 days ago

From there, a member of the legal team will put an 🗨️ emoji on the message to “claim it” and let the requester know a review is in progress. When the review is complete, the approver adds a ✅ emoji. Meanwhile, any questions or necessary changes are communicated in a thread.

Many other teams at Slack rely on [similar request workflows](#). For example, our social media team uses a workflow for content requests, as does our design team for briefs.

Teach new employees your own Slack culture

Slack product training is a core part of our onboarding experience. We’ve developed custom documentation so every new hire knows how to download, launch and log in to Slack, as well as optimize their workspaces.

We’ve automated this process with an onboarding canvas that includes resources that all workers need to best serve their customers and teams. In the [canvas](#), a manager can include a checklist of items to complete in the first week: multiple channels to join with the click of a button, training videos to view and files to read. Managers can also embed workflows to complete tasks, like requesting a corporate phone or setting up video chats with other people in the department, without ever leaving Slack.



Get started today

Using these basic capabilities, you can build all sorts of interesting workflows to save your team time and speed up their work. That extends well beyond the on-demand requests highlighted here. We designed Workflow Builder to make automation simpler and more powerful for everyone. And now a whole new realm of automation possibilities make it even easier to connect your tools in a few clicks, bring workflows seamlessly into your team's workday, and unlock deeper customization with apps hosted in Slack.

To learn more about Workflow Builder, check out [an upcoming or on-demand webinar](#) or [start building your own time-saving automations](#) today. 🌈



About Slack

Slack is on a mission to make people's working lives simpler, more pleasant and more productive. It is the productivity platform for customer companies that improves performance by empowering everyone with no-code automation, making search and knowledge sharing seamless, and keeping teams connected and engaged as they move work forward together. As part of Salesforce, Slack is deeply integrated into the Salesforce Customer 360, supercharging productivity across sales, service and marketing teams. To learn more and get started with Slack for free, visit slack.com or connect with us [@SlackHQ](https://twitter.com/SlackHQ).



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