

Marketing teams and Slack: a guide

Go to market faster and build invaluable relationships
with your partners and customers with Slack.

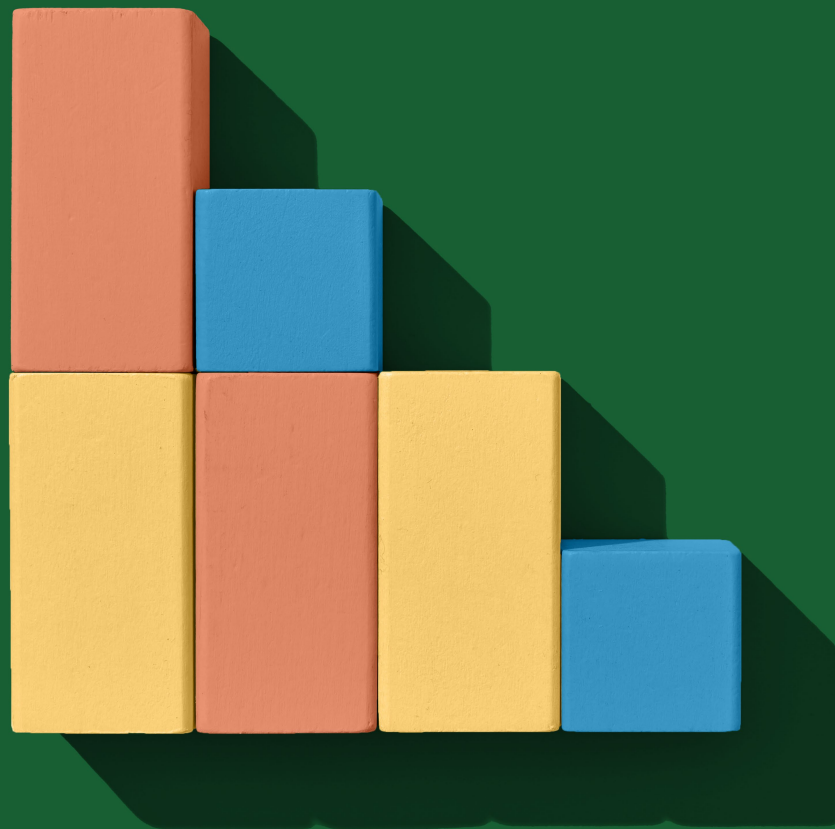


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Introduction

Today is an exciting time for marketing professionals. Automation, tech tools and easily accessible data allow marketing teams to understand customers' needs more deeply than ever before. According to Salesforce's most recent [State of Marketing Report](#), 87% of marketers say their work provides greater value now than it did a year ago.

The same report also found that more than 90% of CMOs say organizations must embrace ongoing innovation to remain competitive. Technological transformation paired with high customer expectations and ongoing economic uncertainty requires organizations to reimagine customer interactions at every step of the buyer journey.

That's a lot of pressure facing modern companies, but Slack is designed to simplify marketing processes while keeping employee costs steady. As a productivity-boosting platform, Slack streamlines day-to-day tasks, freeing up marketers to focus on creative, high-value work.

This guide provides tactical steps for using Slack to connect all the right people, teams and external partners to get to market faster. You'll learn how to work in channels, integrate AI and the apps and services you already use, and deploy various Slack features to surface information in a jiff. With Slack, marketers can devote their time and energy to what matters most: reaching customers and letting them know about your product.

Use this handbook to learn how to:

1. Get to market faster and convert more customers
2. Fuel marketing efficiency with a productivity platform
3. Get the most value from your marketing partnerships



Get to market faster and win more customers

Slack channels are your home base for aligning your people. More than just a place to organize conversations, channels provide marketers a space to brainstorm ideas, organize timelines, execute campaigns, make data-driven decisions together, and, for marketers, ultimately help you get to market faster. For example, you can partner more closely with your sales team in channels to sync on KPIs and get feedback on marketing initiatives.

Public channels are open to anyone at your company to join. These channels increase transparency while allowing everyone to benefit from the context of your conversations. When someone needs more information to move a campaign forward—like the latest survey results or the status of a billboard design—that information is readily accessible when you do your work in public channels. For sensitive or confidential conversations, you can use private channels. Only those who are invited can view the private channel and find its contents in search.

You can even use generative AI to quickly summarize conversations in channels with the **ChatGPT app for Slack**. This app provides a conversational interface powered by OpenAI's large language models to summarize information, research tools to learn about any topic, and provide writing assistance to quickly draft messages. The ChatGPT for Slack app is currently in beta, but you can [sign up to join the access waitlist](#).

“Getting approvals is a lot faster with Slack. And in our industry, being faster means you’re going to bring a product that’s on-trend to market a lot quicker than normal.”

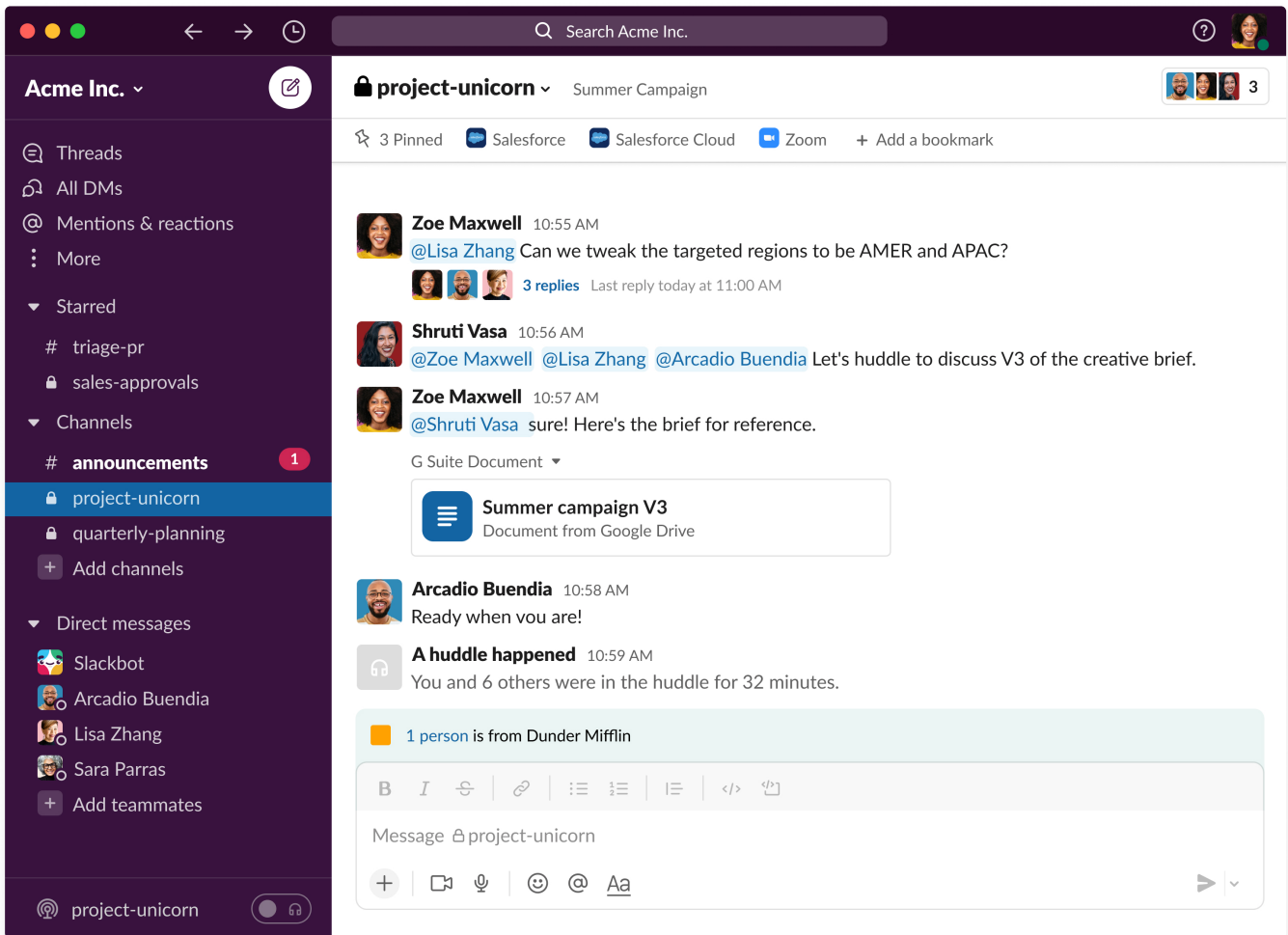
Christopher Newsome

Senior Product Developer for Advanced Concepts, [Cole Haan](#)



Quick tips for simplifying your marketing processes

Keep conversations focused: Organize channels by team (**#team-marketing**), campaigns and feature launches (**#campaign-valentines** or **#feat-website**), function (**#surveynotifications** or **#announcements-marketing**) and projects (**#proj-blog-refresh** or **#proj-alpha**). Start with a few and add more as you go.



Get to market faster and win more customers

Pin important files: Add bookmarks to the top of a channel to keep track of frequently used files, such as campaign kickoff decks and other important documents, including budget trackers, templates and training processes.

Get faster approvals: Share documents or decisions that need input or approval in the channel. At-mention managers or approvers for their attention. Use emoji to signify approvals or other actions so decisions are clear, trackable and accountable.

Automate everyday tasks: **Workflow Builder** is a visual tool that lets anyone automate routine tasks right in Slack—with no coding required. Put these **pre-built workflows** into action with just a few clicks to customize them for your marketing team. Set up weekly reminders (/remind) for yourself, a user group (**@marketing-team**, for example) or an entire channel to remind team members to post status updates on campaign progress and keep records up to date.

Supplement the conversations happening in channels and direct messages with **canvas**, a dedicated place to keep your most essential resources and information, including workflows and third-party data from sources like Salesforce.

Leave voice or visual notes asynchronously, to be viewed or listened to whenever your colleagues come back online, with **clips**.

Quickly hop into audio or video calls inside any channel or message and problem-solve with **huddles**. You can co-work together easily using new features like scheduling and recording.



Fuel marketing efficiency with a productivity platform

When marketing professionals don't understand their customers' needs, their work comes across as inauthentic. Top reasons marketing teams miss out on trends include:

- Not sharing information in a timely manner
- Not responding to and resolving brand incidents quickly
- Failing to incorporate the customer voice into marketing campaigns

Slack provides a dedicated platform for your team to make data-driven decisions, helping you stay relevant to your customers. To reduce context switching, you can consolidate marketing insights from across various dashboards into one unified Slack channel with **Marketing Cloud integrations**. These integrations provide real-time alerts to monitor and adjust campaigns when needed and pass marketing leads faster to sales.

Acme Inc. 📄

🔍 Search Acme Inc.

marketing-campaign Marketing planning and communication on produ... 3

📌 Pinned by you

Jagdeep Das 10:55 AM

Hi everyone! 🙌 In this channel we'll collaborate on the planning for our new product launch.

High level campaign details:

- Budget: \$485k
- KPI's: Open Rate, Click through Rate, Webinar Sign Ups
- Target Audience: IT Decision Makers

Resources:

- [Creative Brief](#)
- [Product Brief](#)
- [Mural Board](#)

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Onboarding Bot WORKFLOW 11:00 AM

Hey @Zoe Maxwell, welcome to #marketing-campaign team! Here's some more important info to help bring you up to speed.

📌 Pinned docs:

Status Tracking: <https://docs.onedrive/document/status>

Ongoing Notes: <https://docs.onedrive/document/notes>

Also, there are a few `external guests` in this channel, so please be mindful of what you share! 🙏



Optimize marketing campaigns with Slack

Increase brand sentiment with aligned PR and social response: Tackle PR incidents faster with automated alerts from across social media and news outlets in a channel where teams can quickly triage. Team members across the company can get looped in and read all the context of the conversation so they can quickly resolve the incident. And through announcement channels, it's easy to share reactive messaging with the marketing department and across the company.

Attract more customers by empowering brand champions: **Slack Connect** makes it easier to nurture deep, differentiated partnerships with customers. Spin up a channel where you and your customers can efficiently work together to speed up approval cycles. You can also create a customer advisory board channel and source valuable feedback on products or marketing initiatives. When you bring the customer voice into the center of everything you do, you build long-term trust with your clients.

Create industry news and competitive intelligence channels where marketers can share recent findings and automatically pull in industry updates from trusted sources.

*“Our **#customer-interactions** Slack channel allows me to understand customer needs and issues more broadly, which gives me more confidence to pick out the most valuable content to share across our social platforms.”*

Melissa Francois
Global Social Media Manager, [SurveyMonkey](#)



Get more value from your marketing partnerships

Marketing teams need to draw from a wide set of data to make decisions. Slack brings key data and insights into channels where marketers can communicate and decide the best course of action. Closer collaboration with agencies and marketing partners means having lockstep alignment on revenue-generating activities that promote growth for the business.

Here are some ways you can build a deeper relationship with partners to convert more bottom-of-the-funnel activities with Slack:

- Deliver enablement and training
- Align on targets and KPIs
- Seek feedback on upcoming marketing activities
- Quickly triage common sales requests using automated workflows
- Search across channels to find subject-matter experts to help inform marketing activities

Deliver quicker results with closer agency collaboration

Forget about calling a meeting. Bring agency relationships out of email and into **Slack Connect** channels, a secure way to communicate with external partners directly in your Slack workspace. Accelerate agency turnaround by sending and sharing files and reports into channels with partners across media, creative, PR and more to provide real-time feedback and deliver faster results together.

Expand reach with deeper marketing relationships

Centralize co-marketing ideation, planning and approvals in Slack Connect channels to fully align every stakeholder across organizations. Working together in one productivity platform means you can coordinate launches for initiatives like joint ads, webinars and sponsored events—in real time—to make a bigger impact across your shared audience.



Get more value from your marketing partnerships

Elevate the customer marketing experience

Put the customer voice at the center of everything you do by connecting with them in Slack to lead advisory councils, collect feedback via workflows, and more. With Slack Connect, build differentiated partnerships with customers by quickly collaborating on customer studies and webinars. Plus, within Slack you can use **generative AI** to draft responses with the right tone and message for important partners.

Upgrade your marketing and sales partnerships

If an event, conference or webinar is a part of your campaign, make sure your invitation and RSVP lists stay updated with the help of the sales team. Just connect the **Salesforce app** to your workspace to automatically pull and share customer contact information right in Slack. Slack channels make it easier to bring in collaborators from sales to respond to leads faster.

“Slack opens doors for editors to reach across the aisle. That kind of communication is incredibly valuable because we don’t want to silo our talent.”

Brooke Siegel
Vice President of Content, **Hearst Magazines**

Convert more leads and shorten response time by using your tools in Slack

Spend less time coming up with a winning strategy and start increasing the likelihood of conversation. Integrate your go-to tools in Slack and loop in collaborators to respond to leads faster.

Simplify your processes by connecting these apps and services to your Slack workplace:

Salesforce Marketing Cloud Intelligence: Connect, visualize and act on your marketing data to optimize performance within campaigns and discover insights in real time.

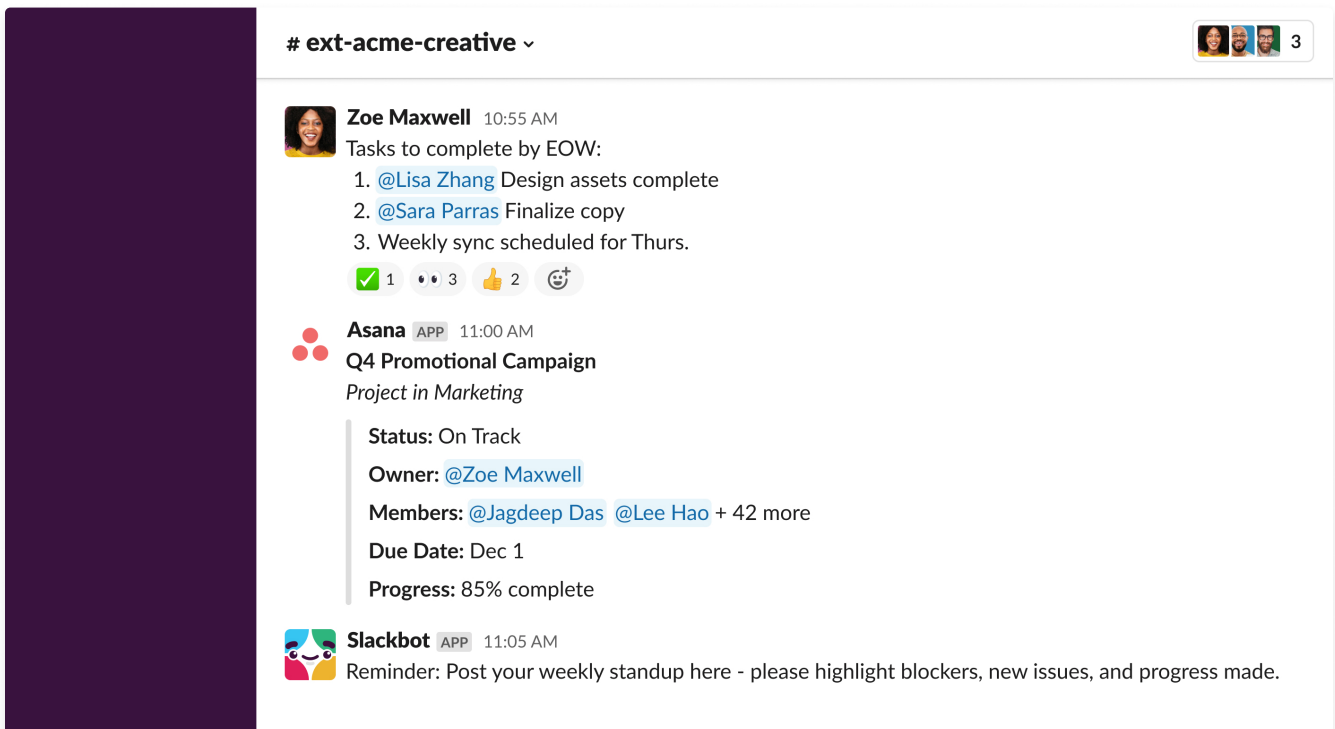
Google Analytics: Instantly get automated reports and alerts sent directly to specific, relevant channels. Choose from a set of pre-made templates or create your own reports and alerts from scratch.



Get more value from your marketing partnerships

DocuSign: Get vendor and agency agreements signed faster by generating, sending and signing documents from Slack. Enable document status and task assignment alerts in both internal and Slack Connect channels.

Asana: Keep everyone aligned and projects moving forward by pulling in updates from this project-tracking tool. Create tasks, add comments, and mark them as complete without leaving the channel.



ext-acme-creative ▾ 3

Zoe Maxwell 10:55 AM
Tasks to complete by EOW:
1. @Lisa Zhang Design assets complete
2. @Sara Parras Finalize copy
3. Weekly sync scheduled for Thurs.
👍 1 👁 3 👏 2 😊

Asana APP 11:00 AM
Q4 Promotional Campaign
Project in Marketing
Status: On Track
Owner: @Zoe Maxwell
Members: @Jagdeep Das @Lee Hao + 42 more
Due Date: Dec 1
Progress: 85% complete

Slackbot APP 11:05 AM
Reminder: Post your weekly standup here - please highlight blockers, new issues, and progress made.

Add these apps to your workspace and discover more in the **Marketing** category of the Slack App Directory.



What's next?

Here are a few things you can do right now to start boosting productivity with Slack:

Make sure everyone has the basics: Get the most out of Slack by learning the ins and outs of the product. Check out [these helpful how-to videos](#) on how to best use the platform and all of our tools, from clips to canvas.

Do some channel cleanup: Maintaining good channel hygiene is essential for keeping communication between marketing teams and colleagues in other departments crystal clear. Make sure to periodically audit your channel list, archiving ones that are no longer relevant or useful. Dive into these [tips for reducing noise in Slack](#).

Rethink your channel names: Is there a consistent naming convention across all your channels? Are they labeled in a way that makes their purpose obvious? Take some time to rename channels so that they're easy to find and follow. [Learn more about channel naming best practices](#).

Use integrations: Stay on top of campaigns, analytics and social media in Slack. Visit our collection of [helpful integrations for marketing teams](#).

For further tips and how-tos on organizing channels, working with apps and more, visit our [marketing resources](#) page. Or if you prefer to speak with someone, reach out anytime at feedback@slack.com or find us on Twitter [@slackhq](#), and we'd be happy to help.

“With Slack, we were able to remove silos across the brand, and that has been critical to developing a sense of community and operating with agility.”

Amit Shah
President, [1-800-Flowers.com](#)



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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