

Slack Case Study

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Design Time: ~3 months, Feb - Apr, Aug 2021

Core Team: 3 people

Role: UX & research lead

Key Contributions: Research plan, customer interviews, session moderation, findings, Design spec, sample dialogue, blockkit JSON, interactive prototypes, animated demos. Exec presentations, partner and sales enablement



Overview

Financial Services is an industry that has many stakeholders and long and complex deal lifecycles. Slack for Investment Banking gives customers easy access to their Salesforce data, makes it easy to collaborate with members of the team, and provides industry insights that help teams stay on top of their deals.

The Problem

Investment Banking deal teams are complex and must comply with regulatory requirements that can cause timelines to slow and carry harsh penalties if done incorrectly. Disparate systems act as barriers to collaboration, slowing progress further.

Constraints

Timeline

- The initial timeline was rapid-fire
- Had to present plan without opportunities to validate with customers

Research

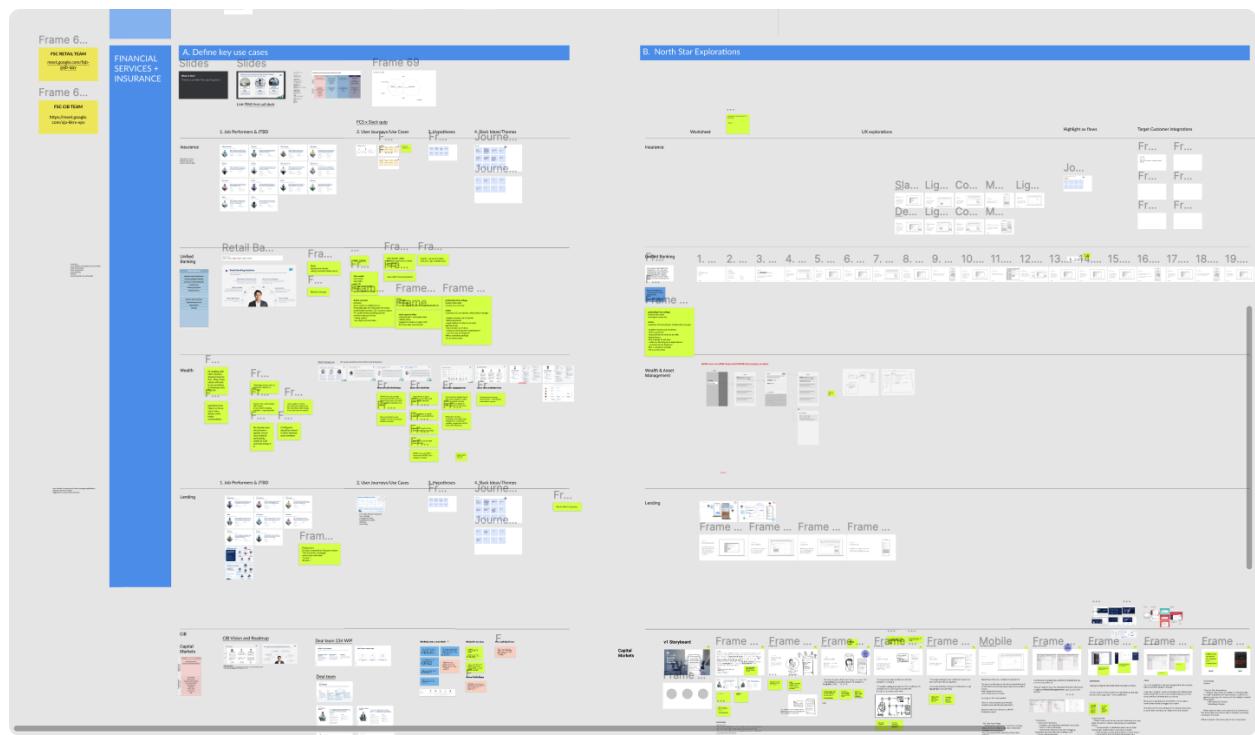
- No dedicated researcher
- Couldn't show any designs, prototypes, or even talk about the work to customers
- Had to create a more high level set of interview questions covering collaboration and working styles.

Dependencies

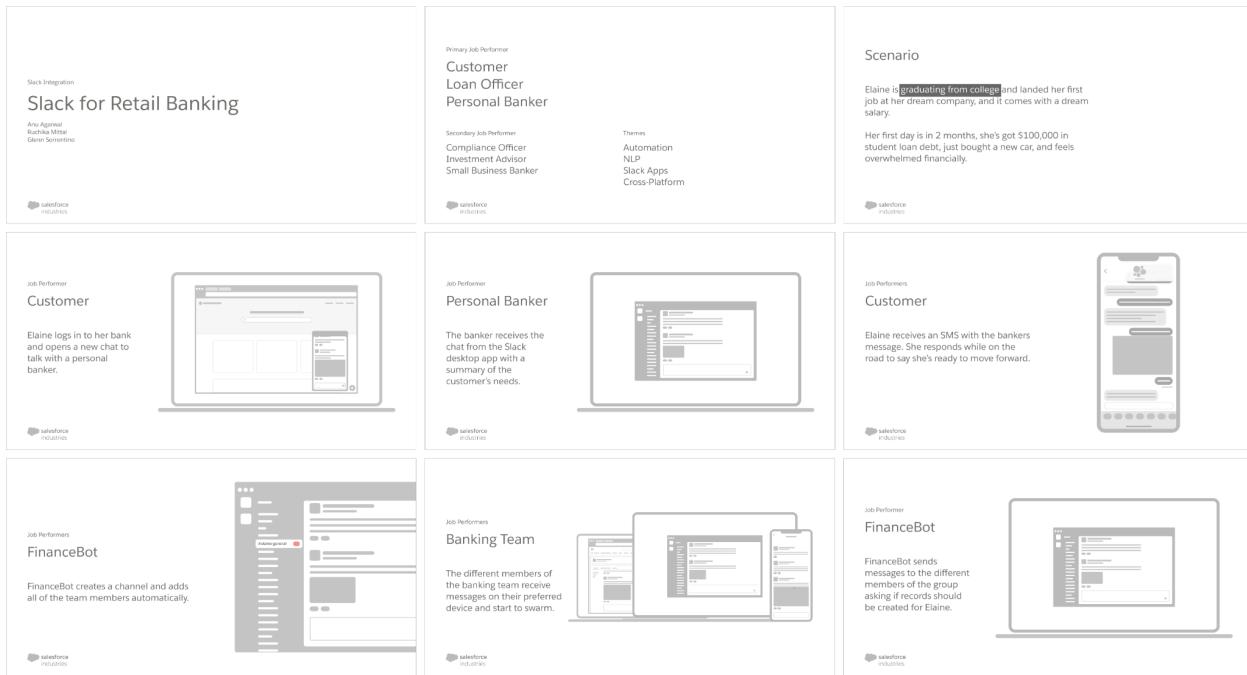
- Waiting on UISF team to deliver functionality for in-message interactions.
- Most functionalities needed to be built from scratch, delaying our time-to-deliver

Design Kickoff

This was one of the most anticipated projects of recent memory at Salesforce, with almost everyone on the team asking to get involved. To get the whole team involved, we kicked off the effort with a cross-functional, international remote design studio using Figma. Our participants included product managers, designers, researchers, and engineers in the US and India.



We thought through use cases across finance verticals, and created storyboards showing how Slack could augment those experiences.



Mad Scramble

About a week after the kickoff workshop teams were asked to present our best use cases to our company executive leadership. We focused on Investment Banking and created a story about how Slack could help deal teams work better. A problem bankers face is information being spread across multiple systems, not taking advantage of automation and huge regulatory finds from incorrect filings. We explored concepts around taking voice notes, automation embedded into workflows, how compliance can be baked in, and using Slack as a hub for all of your federated data.

Financial Services Cloud
Slack Cloud Experiences Update
Feb 12th, 2021

Challenges in Investment Banking

- Need for differentiated client insight
- Inspiring tools and processes for pipeline and deal management
- Increasing regulatory complexity and cost of compliance.

7 SYSTEMS
71% COMPANIES
\$10B REGULATORY FINES ISSUED IN 15 MONTHS (SEP 2018 - DEC 2019)

Big Strategy

What	Who	Why
Corporate & Investment Banking	Deal execution, Corporate client engagement	Internal: Investment Bankers, Analysts, Relationship Managers, External: Clients, Partners
Retail Banking & Lending	High velocity banking and lending with referrals, loan origination and customer onboarding	Internal: Personal Bankers, User Officer, Underwriter, Relationship Manager, Home Assessors, External: Referrals, Customers
Wealth Management	Long term relationship development of high-value customers	Internal: Advisor, Client Relationship Manager, External: Tax Accountant, External: Referrals, Asset Managers
Competitors	Symphony, Microsoft	- Ensures compliant collaboration that is auditable - Early access to market and client relationship data - Moves work away from Microsoft Outlook

Slack is the fabric that knits together financial services professionals, FSC, core systems, and syndicated data for:

- Compliant, contextual collaboration
- Broadest and quickest information and data access
- Accelerating deal (or loan, client onboarding etc.) velocity

Teams
Vision, Search, RSS, External

Systems
Virtual Deal Rooms, FSC, Loan Origination Systems

Data
Investment Banking, Retail Banking, Legal, Compliance, Credit, Risk, Control, Audit

Meet Susan
A Senior Analyst at Banco Dimero, she just wrapped up a great meeting with the CEO of Vondelley Industries.
As Vondelley expressed interest in acquiring Kramica and needs advice on whether they could raise debt or raise equity, she'll also need to engage a bank for the acquisition.
Now Susan needs to create a deal & assemble a deal team to get the process started.

Research

Messaging was a new problem space for many people at the company, so the first thing we did after getting our feet wet was to learn as much as we could about Slack and how our customers consumed messaging apps. The acquisition closed in July, but the work kicked off in February. The timing introduced unique challenges: we weren't allowed to talk to customers about Slack and we couldn't show any design concepts for what we were thinking about.

We created a set of interview questions that surrounded team collaboration and working style. Our goals were to understand how our customer's teams collaborated today, what they liked about their current platforms, what could be improved. Following every few rounds of interviews, we'd refine the designs further in time for our next company presentation

Building The Airplane

Before the acquisition closed, we couldn't communicate with the Slack UX team, and had to start from scratch. Luckily Slack has its Block Kit Builder, which allows users to play with the available components, or blocks, in a demo environment.



Instructions

Read this before you get started.

This library is an ongoing work in progress. **It currently only supports desktop patterns - we haven't had a chance to factor in mobile experiences yet.**

1. If you're unfamiliar with Figma, it's highly recommended you check out our guide on [working in Figma](#) before you get started.
2. There is a brief instructional video that explains the structure of these library and how to use them. You can [watch it here](#).
3. This has not been stress tested yet. If you run into any bugs or have any questions shoot us a message on Slack and we'll try and help you.

Block Kit

I started modeling our use cases in the builder to learn the system and used the output as my guide when creating Figma components. The JSON that the builder provided ended up being a key part of the design spec and was used as a guide for our engineering team.

Four screenshots of the Slack Block Kit Builder interface, showing different examples of Slack message payloads:

- Example 1: Welcome, Jennifer!** A welcome message from a Salesforce account to a Slack user. It includes a header, plain text, and a button to connect to Salesforce.
- Example 2: Initial Public Offering** A message about a recent deal for Vandelay Industries. It includes a header, text fields, and a link to a Google document.
- Example 3: FinanceBot** A message from the FinanceBot. It includes sections for 'What you can do', a 'Create a Channel' button, and a 'New Interaction Summary' section.
- Example 4: Deal Approval** A message about a deal needs your approval. It includes a header, text fields, and buttons for 'Approve' and 'Deny'.

Conversational Design

One recent project was the Einstein Voice Assistant, a conversational way to create, read, and update your data in Salesforce. We used sample dialogs to design the conversational experience, and I brought that practice to the Slack effort by creating a spreadsheet documenting our key flows and their conversational designs.

The information documented included the job performer, the slash command to instantiate the flow, the dialogue, the type of block kit component, where the interaction happened, and links to the Block Kit JSON from the buidler.

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A1	A	B	C	D	E	F	G
1	Use Case	Job Performer	Slash Commands	Dialogue/UI Text	What?	Where	Links
2	New Interaction Summary	User	/create interaction summary	Create interaction summary	Section / mrkdwn	App / Messages	Block Kit Builder
3		Bot		I found a few recent interactions. Which is the one you're looking for?	Section / mrkdwn		
4				Client Meet and Greet Deal Initial Public Offering Participants George Costanza, Art Vandelay Date February 27th, 2021 [Select]	Section / button		
5				Q1 Planning Deal Company Acquisition Participants Jennifer Wilcox, Elaine Benes Date February 23rd, 2021 [Select]	Section / button		
6				Closing Retrospective Deal Company Acquisition Participants Elaine Benes, Art Vandelay, George Costanza Date January 2nd, 2021 [Select]	Section / button		
7				[View More]	Actions / button		
8				Interaction Name	Input / plain text input	Modal	Block Kit Builder
9				Notes	Input / multiline plain text input		
10				Okay Jennifer, I saved your interaction summary! View it any time in Lightning...	Section / mrkdwn	App / Messages	Block Kit Builder
11				Client Meet and Greet Notes Interaction Client Meet and Greet Notes Great meeting. We need to update the contract to reflect the current agreement, but otherwise all green!	Section / image		
12				Anything else you'd like to do?	Section / mrkdwn		
13				[Get Account Details] [New Contact] [New Deal]	Actions / button		
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Prototyping

With the spreadsheet as our source of truth, and the Block Kit JSON showing us the expected interface, I translated the UI into Figma and built a prototype that demonstrated its interactivity. From the prototype, created animated GIFs that were embedded into the design specifications for their respective flows.



Evaluative Research

The Slack deal closed in mid-July, about 6 months after our work kicked off. This offered the benefit of having time to iterate but was difficult because we couldn't validate our concepts until our teams were basically committed to building.

Design Spec

With the sample dialogue complete, the conversations modeled in the Block Kit Builder, and prototypes in place, I created a design spec that collated all of the information for our product and engineering teams. It included CX principles, information about the users we were solving for, demos, and detailed interaction specs.

Slack + CIB User Experience
Updated May 19, 2021

Basic Conversation Structure

"Now." > "Did you mean..." > I found a few results... > Action > Are you sure? > Anything else?

Query → Meliora → Disambiguate → User Intent (Create a Record / Update a Record) → Evaluate (prioritize) → Next Action

Basic Conversation Structure

Query → Disambiguation → Result → Next Action

Job Performer Senior Banker

"I need customer and deal data on the go. I usually do not have time to go into multiple systems to gather information"

Join to the team
Manage and develop relationships
Generate deal ideas and opportunities to add deal volumes
Increase deal success and productivity

Meet Demos
• Share of deal
• Deal size
• Deal volume
• Deal success rate
• Deal cycle time

Industry Lessons
• Sales
• Marketing

Customer

"I need to be in the loop for all the information relevant to the deal. I would like to be able to reach out to the deal team as and when needed."

Join to the team
• Communicate with the deal team
• Share
• Deal information
• Deal success rate
• Deal cycle time

Industry Lessons
• Sales
• Marketing

Key Use Case Deal Lifecycle

1 Deal Identification (Senior Banker, Analyst, Compliance)
2 Client Pitch (Senior Banker, Analyst)
3 Post Deal Collaboration (Senior, Customer)

Account Details Shortcuts

Typing ":" opens the shortcuts menu.
The user can type "M-finansy" to view all available commands.
If the action the user needs is in the suggested menu, they can click on it directly. It's displayed without the "M-finansy" prefix.

Account Details Disambiguation

If we're not sure what the correct record is, the user can use the search function. Basic metadata about the record is displayed and the user can choose the correct one.

Successes

- Fast team response time
- Lean, collaborative team
- Adapted to constraints successfully
- Drawing from past experience
- Called the most interesting set of use cases

Learnings & Reminders

- Lean research methods can work at scale
 - Heuristic evaluations
 - Interviews with content restrictions
 - No showing concepts
 - No talking about concepts
- Spreadsheets are a bridge
 - Not everyone is comfortable working in Figma
 - Co-ownership opportunities
 - Good for remote collaboration
- Use well-known characters as actors in your stories
 - Art Vandelay always kills it
 - Lightens the environment
 - Brings levity

Closing

Slack was the second