

Improving User Education for Slack Save for Later

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(Please note : We have considered only the desktop version of Slack for this study.)

1. Problem Definition

Why low adoption of Save for Later is a problem for Slack

Slack's Vision and Mission: Slack's mission is to "make work life simpler, more pleasant, and more productive." It envisions a world where teams communicate seamlessly, reducing inefficiencies caused by scattered information and lost messages. By integrating powerful tools directly into conversations, Slack aims to become the central hub of workplace productivity.

The Problem - Underutilization of a Key Productivity Feature: Slack's 'Save for Later' allows users to bookmark important messages, files, or content for future reference. However, only 12% of users leverage this feature, indicating a lack of awareness and adoption. In contrast, features like Pinned Messages and Search are widely used, demonstrating that Slack users actively seek ways to manage and retrieve information.

Impact on User Experience and Productivity: Without 'Save for Later,' users experience:

- **Information Overload** – Important messages get lost in fast-moving channels.
- **Inefficient Follow-ups** – Users forget crucial action items due to lack of bookmarking.
- **Workflow Disruptions** – Users resort to external task managers instead of utilizing Slack's built-in productivity tools.

If 'Save for Later' were more widely adopted, Slack could enhance its role as a productivity-first platform, ensuring users can efficiently track, organize, and revisit important information without leaving the app.

Possible reasons users might not discover or use this feature

A. Onboarding & Visibility Issues

- **Lack of Onboarding Flow** – No guided introduction to 'Save for Later' for new users.
- **Poor Visibility** – Hidden under the three-dot menu, requiring extra clicks to access.
- **Inconsistent UI** – The feature only appears after first use, making it invisible to new users.

B. Usability & Awareness Gaps

- **Poor Empty State Design** – Users don't get any guidance or tutorial when visiting 'Save for Later' for the first time.
- **Feature Not Highlighted** – No UI emphasis makes it easy to overlook.
- **Feature Not Intuitive** – Users may find it unclear or cumbersome to use.


C. Functional & Experience Limitations

- **Absence in Help Resources** – Slack’s tutorials and help pages do not promote this feature.
- **Limited Functionality** – No search option within ‘Save for Later’ for retrieval from saved content. One must use global search and apply relevant filters.
- **Lack of Sorting Options** – Users cannot filter by oldest/newest messages.
- **No Personalization** – No ability to add notes/context when saving messages.
- **Offline Mode** – Lack of offline access leads to frustration.


2. Target User Segments

Slack serves a diverse user base with different needs. Below are two key personas who would benefit most from ‘Save for Later’

Persona 1 : The Overwhelmed Fresher

	<table><tr><th data-bbox="712 856 997 909">Key challenges</th><th data-bbox="1029 856 1382 909">How Save For Later helps</th></tr><tr><td data-bbox="712 919 997 1119">Too much incoming information: Multiple Slack channels, DMs, project discussions, and meeting notes flood his workspace.</td><td data-bbox="1029 919 1382 1119">Acts as a personal bookmarking tool: Rahul can quickly save important messages, documents, or instructions for later reference.</td></tr><tr><td data-bbox="712 1161 997 1360">Lack of structured task management skills: No experience in prioritizing work efficiently.</td><td data-bbox="1029 1161 1382 1360">Improves task management: Instead of keeping separate notes or forgetting key points, he can rely on Slack itself to track important discussions.</td></tr><tr><td data-bbox="712 1402 997 1602">Fear of missing important updates: Critical messages get buried under new conversations.</td><td data-bbox="1029 1402 1382 1602">Reduces anxiety: He can revisit saved messages at his own pace without fear of missing anything crucial.</td></tr></table>	Key challenges	How Save For Later helps	Too much incoming information: Multiple Slack channels, DMs, project discussions, and meeting notes flood his workspace.	Acts as a personal bookmarking tool: Rahul can quickly save important messages, documents, or instructions for later reference.	Lack of structured task management skills: No experience in prioritizing work efficiently.	Improves task management: Instead of keeping separate notes or forgetting key points, he can rely on Slack itself to track important discussions.	Fear of missing important updates: Critical messages get buried under new conversations.	Reduces anxiety: He can revisit saved messages at his own pace without fear of missing anything crucial.
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<p>Name: Rahul (22) Role: Junior Software Engineer (First Job) Key Challenge: Struggling with information overload and task management in a fast-paced workspace.</p>									

Persona 2 : The Busy Product Manager



Name: Priya (30)
Role: Product Manager at a SaaS Company
Key Challenge: Managing multiple projects, stakeholders, and cross-functional team updates simultaneously.

Key challenges	How Save For Later helps
Constant interruptions: Pings from engineers, designers, leadership, and customer teams in different Slack channels.	Quickly saves action items & decisions: Instead of manually tracking key updates, she can save critical messages instantly.
Scattered information: Discussions happen in various threads, DMs, and team channels, making it hard to track decisions.	Improves follow-ups: During meetings, she can revisit saved Slack messages and ensure no task falls through the cracks.
Prioritizing urgent vs non-urgent messages: Not all messages require immediate action, but she needs a way to mark what requires follow-up.	Acts as a triage system: She can save and categorize messages for later prioritization and set appropriate reminders for each.

3. Proposed Educational Strategies

Strategy 1: Comprehensive Onboarding for New Users

New users don't discover 'Save for Later' due to poor onboarding. This strategy ensures **visibility, structured learning, and engagement from Day 1**.

Key Components:

Basic Hygiene – Ensure **the Later tab is always visible** in the left nav bar to improve discoverability.

- Interactive Walkthrough** – When users land on **Home for the first time**, a **step-by-step tooltip walkthrough** introduces top Slack features, including 'Save for Later', with an option to skip.
- Onboarding Checklist** – If users **skip the walkthrough**, an **#onboarding channel** appears on Home, containing information regarding key features in the form of a *Your Essential Slack Checklist*. Every item is clickable in this checklist. For eg, clicking on 'Save for Later' launches a **30-sec video tutorial** explaining how to save messages. And after the video is watched, a text

appears under 'Save for Later' item saying "Now try saving a message and mark this task as complete." to provide additional nudge to take action and learn about the feature.

3. **Video Guide in Later Tab** – The first time a user clicks **Later**, they can see a demo video which explains how to use 'Save for Later' in detail, including what all can be saved and from where. Like files can be saved from within a huddle chat and messages can be saved from DMs as well as channels. Even messages within threads can be saved. A **"Mark as Complete" button** removes the video after learning.

Low Adoption Issue

No onboarding flow – Users don't know the feature exists.

Feature is hidden – Only appears after first use.

Users abandon it due to poor UI/UX

Users forget about the feature

How Onboarding Fixes It

Interactive walkthrough introduces it upfront.

'Later' tab is **always visible** from the start.

Walkthrough + checklist offer structured, flexible learning.

#onboarding channel allows re-engagement later.

How This Helps Different User Personas:

Rahul is overwhelmed by Slack's **fast-moving conversations** and **struggles to keep track** of important messages. The Interactive Walkthrough introduces him to 'Save for Later' immediately, while the #onboarding channel allows him to revisit it later. The always-visible Later tab ensures he can rediscover the feature when needed, **helping him stay organized**.

Priya juggles **multiple projects** and often **misses key decisions** in fragmented Slack discussions. The persistent Later tab makes the feature easy to discover, while the #onboarding channel and tutorial video show her how to save and track important messages for meetings. This helps her **streamline decision-making** and stay on top of conversations.

Strategy 2: Contextual Nudges for Existing Users

Many users never adopt 'Save for Later' because they don't realize when they need it. This strategy provides **timely, personalized nudges** based on user behavior to drive feature adoption at the right moments.

Key Components:

1. **Smart Prompts Based on User Actions** – Slack detects key actions and suggests 'Save for Later' when it's most useful.

- If a user receives 10+ messages within 5 minutes → *“Overwhelmed? Save important messages for later.”*
- If a user searches for an old message → *“Want to find things faster next time? Try saving messages.”*

Along with the message, it shows a button “Click to know how”. On clicking, a video pops up and explains the feature.

2. Nudges for Decision-Heavy Conversations – When users get tagged in **key discussions** or scroll up in a channel to **find past messages**, Slack suggests saving important messages to track key updates easily.

3. Follow-Up Reminders for Unread Messages – If a user **skips messages during a meeting**, Slack nudges them: *“Busy? Save these messages for later review.”*

Low Adoption Issue

Users don’t realize when to use it – No proactive guidance exists.

Users don’t see the value – They don’t understand why it’s useful.

Users forget about the feature – If they don’t adopt it early, they never explore it later.

How Onboarding Fixes It

Nudges appear at **exactly the right time**, making adoption seamless.

Nudges **explain how saving messages helps in real workflows**.

Repeated prompts reinforce the habit, ensuring retention.

How This Helps Different User Personas:

Rahul struggles to **keep up with messages and finds himself constantly searching for past conversations**. When he receives **a flood of messages**, Slack nudges him to **save key ones** instead of losing track. If he **scrolls up to find an old message**, a prompt suggests saving messages for quick access, helping him stay organized.

Priya deals with **high-priority decisions scattered across different Slack conversations**. When she **gets tagged in a key discussion**, Slack nudges her to **save important messages for future reference**. If she **skips messages during a meeting**, a follow-up reminder prompts her to save them for later review, ensuring she never misses critical updates.

4. Success Metrics

To measure the effectiveness of **onboarding and contextual nudges**, we will track:

Metrics for Strategy 1: Comprehensive Onboarding for New Users

Goal: Ensure **higher feature awareness and early adoption** of 'Save for Later.'

Metric	What It Measures	Success Indicator
Increase in Save for Later Usage	% of new users adopting the feature after onboarding.	Growth from 12% → 30% adoption.
Time taken between sign-up and first save	How quickly users start using 'Save for Later' after onboarding.	Shorter time indicates faster discovery and adoption.
Number of clicks on 'Save for Later' icon	Direct engagement with the feature during/after onboarding.	More clicks mean higher first-time engagement.
% of users completing onboarding	How many users finish the walkthrough or revisit the #onboarding checklist.	Target: 80%+ engagement with onboarding.

Metrics for Strategy 2: Contextual Nudges for Existing Users

Goal: Increase **feature adoption and long-term retention** via timely prompts.

Metric	What It Measures	Success Indicator
Number of messages saved per user	Tracks overall increase in feature usage.	30%+ increase in messages saved per user.
Follow-through rate on nudge suggestions	% of users who take action after receiving a nudge.	25%+ nudge conversion rate.
Increase in users returning to their saved messages	Measures retention and repeat usage of 'Save for Later'.	More users revisiting saved messages over time.

By tracking these **key success metrics**, Slack can effectively measure how well **onboarding and contextual nudges drive adoption** of 'Save for Later.'