

# Marketing

[ReadMe] **How this document works:** This document provides a click path and talk track to demo Slack's business value for how an organization can collaborate together for a specific Department's use case. It's designed to be completed in 15-20 minutes by you. The ideal audience is someone who is either new to Slack or seeing it for the first time. The talk track is merely suggestive. It is highly advised you tailor your communication to your unique situation. **Green** items are **instructions** to you, **Black *italics*** are the suggested verbal talk tracks, and **Blue bold** are channels or locations of where to click.

Please note, this talk track does not highlight every feature of Slack as that may not resonate well. Your job through discovery is to unearth what will truly resonate because it solves a genuine business problem. Apply some creative liberties, have fun & experiment, and kick butt!

If you are doing a **Plus** only demo, you should be in the **Global** workspace where you will find all channels mentioned below.

If you are doing a **Grid** demo, you will highlight shared channels, and begin in Global.

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## ☆Channels to Star For Demo

• #announcements-global	• #market-research
• #board	• #plz-customer-mktg
• #bizops	• #marketing-brainstorm
• #exec-ama	• #outdoor-campaign

## General Demo Beginning - *Your persona here is that of a general Executive*

1. Have user start in **#announcements-global** with their profile displayed in flexpane
  - a. At the highest level, I use Slack to stay connected with my organization
  - b. Here, I am viewing a channel called **global announcements**, which is a great way for me to stay up to date with what's happening within my org from our CEO
    - i. List out examples like: recent announcements/revenue/holiday updates/etc
    - ii. Note: #announcements-mx/sf are very similar; choose the best for your audience
  - c. Slack lets me organize this information in a way that helps me get my job done
  - d. What are these exactly on my left hand side?
2. Mouse cursor over left hand rail of all channels, starred, and DMs/apps; scroll up/down to view - ensure you have the above channels/DMs starred
  - a. I can quickly access important information that's organized in Channels, it's where groups of people can work together around the same topic - you can have public and private

- b. these will vary for me: everywhere from one to many like the Global Announcements we are in, to private channels, and even 1:1 or small ad hoc direct messages
- c. I can organize these my way; I have multiple projects I'm working on and can "star" them to see them at the top
- d. Slack is about getting work done, bringing people and the tools they use into these channels in order to do our job

### 3. Demoing Search/Quick Switcher

- a. Over time, I've joined a few projects and channels as an executive, and Slack helps me find what I need to work on with machine learning and artificial intelligence
  - i. Open up Quick Switcher by cmd+k (mac)/ctrl+k (windows)
  - ii. Leave blank for now
  - iii. Consider adding in comment on how this Slack Workspace has a standard naming convention (cs-, accounts-, exec-, etc) making it even easier for the user to find channels
- b. One thing I can easily do is look for our Slack Channel in which employees ask the executive team any question
- c. I'm a pretty forgetful person at times, but I know we have an exec ask-me-anything
- d. With Slack, I can simply start typing in exec
- e. Slack's AI branch, the Search Learning and Intelligence division, curates a list of results for me that is based on my recently accessed channels or people I've been collaborating with - narrowing down exactly what I need

### 4. Click into #exec-ama

- a. Now I'm in the right place - when I land in any channel, I can open the details
  - i. Click "i" on the channel
- b. And Slack's SLI team again works for me to surface critical information \*to me\*
- c. Slack's algorithms show the people who have posted often (like the CEO, rightfully here), which also gives me a sense of who might be an expert in this channel - of course the CEO would know the most about their business direction!
- d. Slack's SLI team brings information to our users, and makes finding information much easier, and much more effective
  - i. Discussion Point: How do your users find subject matter experts?
- e. Getting back to the channel: In addition to job duties, one of the most liked features executive teams talk about is how easy it is to have an informal townhall/ask-me-anything
- f. This has been a great way to get a pulse check on our business
- g. We no longer have to wait for All Hands, nor do we have to feel shy
- h. In our AMA public channel, anyone within the organization can pipe in and ask questions - very quickly, people find that they aren't the only ones who share their curiosities
  - i. Highlight Stephanie's plus emoji
  - ii. If Grid, emphasize the point that this channel can be accessed in multiple environments, ensuring everyone has a voice; otherwise still emphasize everyone has a voice in the same environment>
- i. We've seen increased participation, and faster changes in implementation/culture/processes with this
  - i. Discussion Point: How does your executive team gather and respond to feedback?

### 5. Click into #bizops

- a. Our CFO has integrated our system metrics tools to ensure our leadership team can easily stay on top of important metrics
  - b. As executives, we often speak at public events but are unfortunately too busy to log into our CRM, ERP and other systems to see the health of our business
  - c. And now with Slack I can view the latest details automatically by having my tools pipe in critical information
  - d. For our organization, we keep this channel public to drive transparency, but Slack accommodates us if we wanted to keep this piping into a more private channel
6. Click into 📲 #board
- a. As an executive, Slack lets our team work directly with the Board of Directors in a secure private channel - this is an invite-only location where industry knowledge, ideation, referrals, meeting minutes, and other sensitive information is captured and collaborated on
  - b. This helps our executives stay connected with peers and mentors
    - i. Scroll up to Josie's Harvard Business Review
  - c. Within Slack, our executives share insightful articles to uplevel our leadership team, and I can view high level content directly within the conversation
    - i. Highlight Slack's unfurl
  - d. In the past, our team often had to rely on email or once a month/quarter Board Meetings to be able to share best practices and ask insightful questions, now with Slack they are able to do that in real time asynchronously from anywhere in the world on all of their devices

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Introduce demo story - shows how Marketing teams can leverage Slack to perform research, centralize asks of the marketing team for customers, brainstorm in an open forum, and also plan upcoming events.

1. Click into #plz-customer-mktg
- a. As our marketing team continues to grow, we wanted to find a consistent way to surface customer requests
  - b. Before, the requests usually went to an email distribution list, and whether or not you are working on a relevant initiative, that would come to my inbox which took focus away from other key priorities I was working on
    - i. Scroll to the top of the channel or beginning of the channel's story
  - c. Here in this channel, our marketing manager Bernie created a template so it becomes very easy to request customer marketing - whether that's references or case studies
  - d. I think this template could be a great post to ensure everyone sees how to use this "plz" channel
    - i. Out of character, relate to how we use plz-xyz channels here at Slack
    - ii. Discuss if they have systems in place for capturing requests
      - 1. If not, how does their team work with handling these types of requests?
  - e. I can "pin" files and messages like this one to the channel's "virtual corkboard" - channel newcomers can quickly get up-to-speed on important information, or in this case figure out how to request customer marketing assets
    - i. Pin Bernie's template post
    - ii. Scroll down

- f. I can see my colleagues Christina and Maria are asking for assets already, and they are able to visually designate prioritization by using this simple model
  - i. Discuss blue, white and red circles to describe asap, when you can, urgent
  - ii. Time permitting, make a red request for EMEA Case studies; simply copy Maria's text and repeat it
- 2. Click into #marketing-brainstorm
  - a. My team uses Slack to ideate together for new, unique, and radical ideas for our marketing campaigns
  - b. Channels like these are a safe place to have miscellaneous, campaign/idea-related conversations that are quickly viewable and searchable
    - i. Out of character, state that many Slack customers in the marketing and media space leverage brainstorm channels this way
    - ii. Use this as a point to discuss how their company tools may or may not promote a culture of open ideation
    - iii. How doe ideas get generated?
  - c. In this channel, I can freely discuss ideas on how we can drive brand recognition
  - d. Or I can view some of the ideas people have submitted and "plus" them - we can use Slack here to effectively "uplevel" popular crowdsourced ideas!
    - i. Action - Emoji "plus" one of the images
- 3. Click into #market-research
  - a. Our company operates in a very competitive environment and it's important that we make sure that we're producing materials that will resonate with our customers in a meaningful way
  - b. We need to collaborate together to do effective market research that will inform meaningful campaigns and deliverables for the business
    - i. Scroll up to the top of the channel or beginning of the channel's story
  - c. Previously, our various team members had prepared for and digested research in silos of information: often times email, and others within chat clients
  - d. This made it very hard for me to get a sense of how our research is going and for me to present the findings back to cross functional stakeholders
  - e. As we begin a new round of market researching, my company is using Slack to bring together our team in a dedicated research channel
    - i. Click and temporarily hover on Bella's avatar
  - f. Our director of marketing, Bella, is able to kick off the first round of our research of testing various messages with potential customers
  - g. Slack makes it very easy for me to view this important message from leadership with clear action items
    - i. Highlight Slack's ability to organize upcoming dates, and clear assignments with @-mentions
  - h. I can see quickly that Peter has uploaded our Actor Headshots Demo, and people have responded already with emoji - a way to let Peter know they've seen and in this case supported this file
  - i. Slack brings comments around files into the conversation to allow people to collaborate together
  - j. File sharing in Slack natively or through our integrations really make these channels the hub in which our team is collaborating to get work done
  - k. Tying files into the conversation gives additional context and allows for key documents to live in and be searchable in a channel

- i. Click "i" for this channel to show how both files are easily accessible
    - ii. Drive a discussion point on how they organize and associate critical files to an initiative
    - iii. Scroll down
  - I. With Slack, Bella is able to provide critical updates directly from her mobile phone while on the go, or from the Airplane as she's flying back - these greatly help align our team and help us deliver faster output to the business
    - i. Out of character, state IDC research concluded Marketers are able to produce campaigns 8% faster
4. Click into **#outdoor-campaign**
- a. Here, we are putting everything together - the cumulative effect of the collaboration we've seen in our channels we can take the product/feature/etc, the synthesized output of all of our brainstorms, and the message that was found to resonate the most
  - b. Previously, we had blown through budget as well as launched campaigns where not everyone was able to voice a concern
  - c. With Slack, our team wanted to ensure everyone had visibility into critical things like our Briefing document, which can quickly be pinned to this document
    - i. Pin Brief document
  - d. I know Pierre was working very closely with our brainstorming channel as well, and since this discussion around the document is happening in our public campaign channel, I will quickly share this for Pierre in the brainstorm channel - it would be great to have more eyes on this
    - i. Share Brief document from Pierre in #marketing-brainstorm by clicking share (too many clicks if you were to copy the link, go to the channel and paste it)
    - ii. Continue scrolling down
  - e. Capturing Anca's feedback in real time is very helpful, since it provides our team contextual ability to collaborate quickly with her
  - f. Since budget issues were commonplace before Slack, our team integrated our Harvest tool directly into this channel to ensure frequent updates as to how we are tracking against our budget
    - i. Scroll down, stop at Harvest app unfurl
  - g. This is fantastic, I can easily review this conversation without having to open up Harvest app, log-in, and view the budget
  - h. This makes it easy for me to review on my upcoming plane ride
  - i. And finally, we can see that Todd has generated an app for review through our integration with Invision
    - i. Supply "eyes" emoji to harvest unfurl
    - ii. Provide comment along the lines of "this is great!"
    - iii. Tag Bella in channel for her approval of the invision app

5. Done