

Project Management

[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.

☆Channels to Star For Demo

• #announcements-global	• #proj-echo-trello
• #board	• #proj-echo-standup
• #bizops	• #proj-echo-milestones
• #exec-ama	• #proj-echo-go-live
• #proj-echo-team	

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

Introduce demo story - this flow highlights a company's initiative, code named Project Echo, to revamp their main website. Note also that this flow is quite modular, and you can tailor the sections to fit your customer's requirements. You do not have to go through all steps in sequence.

Additional Source - Marina Milenkovic wrote the skeleton for this talk track and contains many great benefits. Not all are discussed in the context of this 10-15 minute demo. [Marina Talk Tracks and Benefit Points](#)

1. Click into #proj-echo-team
- a. Slack is being utilized by my company to completely redesign our website, and to focus our efforts for this project, that we are calling Echo, we've created a few channels where we can collaborate between Program Management, Engineering, Marketing, and Sales
 - i. Scroll to the top of the channel/beginning of the channel's story
 - b. I've just been assigned to work on Echo so the first thing I need to do is get caught up and familiarize myself with my new team
 - c. One of the benefits my company is seeing right now with Slack is that we are able to capture the full history of a given project
 - d. I can quickly scroll to the top of any channel to get caught up on the genesis of this channel
 - e. Here I can easily confirm that this is the correct space to follow along for our company website's redesign
 - f. And I can quickly see that Paige is my Program Manager
 - i. Click Paige's title to highlight this
 - g. She's uploaded our team's Project Kickoff document to ensure everyone is on the same page

- h. These team and project channels are a safe place to have miscellaneous, project-related conversations that are quickly viewable and searchable
 - i. As I'm scrolling down, I can see the unfolding of our teams working together, quickly culminating in others agreeing that having a Project Timeline is key; I can easily see two people equally agree this is important so I know I'm not the only one
 - i. Highlight "plus" emoji for Bernie's comment on timeline
 - j. This lets people "prioritize" messages and asks within context
- 2. Click into **#proj-echo-trello**
 - a. Our team uses a lot of different tools to get our work done, and for Project Echo we have integrated Trello directly into Slack
 - b. Trello is our project management tool, and is our source of truth for project-related tasks.
 - i. Scroll quickly to the top of the channel or beginning of the channel's story to show Paige wanting to integrate Trello, and then proceed to scroll back down to begin highlighting the various trello cards
 - c. With Trello, I can easily see how our team is making fantastic progress on Project Echo
 - d. Trello is piping project updates directly into this channel so I can stay abreast of what is still left to do, what is in progress, and what has been completed
 - e. I can even see that new team members have been added in from Engineering, so if I wanted additional clarity, I know exactly who to work with
 - i. Use this as a discussion point to engage how they accomplish project updates
 1. How easy is it for them to stay on top of the updates?
 2. How easy is it to figure out who the subject matter expert is for a given project?
 - f. The great benefit here for me is that I do not have to live in Trello - this way, Slack is working for me, and prevents any switching costs I or my team has to do from having to go to another application to find an update and jump back to discuss that update
- 3. Click into **#proj-echo-standup** - no need to scroll up
 - a. We are a very Agile company - our standups have digitized completely on Slack
 - b. Before, Program Managers may receive dozens of emails for each project from each member; often times members work on multiple project reporting to the same program manager and this added to our backlog, project delays, and many mistakes
 - c. With our integration into Standup Bot through Slack's Platform, our program managers can take a step back and again have Slack work for them
 - d. Here we can see Standup Bot has mentioned everyone in the channel, which it does every week, to discuss our success, challenges, and one thing we're looking forward to
 - e. For me, this has greatly helped because I can focus on my work by not having to attend these meetings or view where I can provide help to others
 - i. Draw attention to Alexandra's cactus emoji: our front end engineer Sachin may see this and acknowledge he could help easily
 - ii. Time permitting, and out of character, consider the fact that many teams here at Slack do this exactly. For inspiration, head over to the #se-team channel in TinySpeck's Sales & Customer Success Workspace on any given Wednesday. Customers want to know we dogfood, and this is a great example
- 4. Click into **#proj-echo-milestones**
 - a. Having various aspects of my project in these aptly named channels allows me to easily find critical information

- b. *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*
 - c. *Tying files into the conversation gives additional context and allows for key documents to live in and be searchable in a channel*
 - d. *Since this seems pretty important, and I think others will benefit from quickly wanting to reference this, I'm going to "pin" it to this channel so it is easily referenceable*
 - e. *You can think of pinned items as the most important messages and documents that live on a channel's "virtual corkboard."*
 - i. Pin the Timeline document
 - ii. Click into "i" for this channel and talk about pinning *as it pertains to their use case*; or use it as a comparison to today's workflows: consider important information shared in a very large email thread if you need an example
 - f. *This also makes Paige's life a whole lot simpler since she can easily update the document in one location without having to sift through other communication silos*
 - g. *Just like that in a few minutes, I am caught up on where we are in this project*
 - h. *I did not have to start at inbox zero, but rather, am able to pull myself into this discussion with full context*
5. **Click into #proj-echo-go-live**
- a. *It's go-live day for the new website!*
 - i. Scroll to the top of the channel or beginning of the channel's story
 - b. *The Engineering team uses this channel to deploy the site to production servers*
 - i. Begin to scroll down
 - c. *As the team is communicating here, we see that Sachin hit a bug*
 - d. *Because everyone is a part of a channel, they can quickly help one another and triage the incident*
 - i. Expand upon the benefit of having everyone discussing the incident at hand and having the full context of the previous steps that were taken
 - ii. Do this in context to your customer's scenario
 - e. *With this go live channel, our executive team can have full visibility on this critical project, as well as our team can preserve any learnings from deployment as all of our communication is archived and searchable*
6. **Done**