

# Accounts and Lead Collaboration

[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	• #accounts-burlington
• #board	• #deal-requests
• #bizops	• #deal-assignments
• #exec-ama	• #sales-eng-help
• #sales-announcements	

## 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 - highlighting how Slack can streamline collaboration between sales, leadership and legal by consolidating the communication and bringing in key integrations from SFDC and Box to drive business forward to close more deals and keep customers happy.

For additional context in Accounts collaboration, see this \*internal\* presentation for optional value adds for Slack: [Slack for Sales - Gigamon presented June 21, 2018](#)

1. Click into #sales-announcements
  - a. Similar to a global announcements, Slack lets me stay on top of my own immediate team's announcements with our department channel
  - b. I can see my colleague Bernie was recently promoted, so I can congratulate her directly in Slack without having to send another reply-all email
  - c. I am very mobile, always meeting with my customers, so I can catch-up anytime I want to see we have an upcoming session on how we did last quarter
  - d. Slack isn't just about broadcasting critical information though. As a Sales Rep, I can do everything I need to for my work with my customers
2. Click into #accounts-burlington
  - a. As a Sales Rep, I can organize all of my accounts I need to stay on top of as Channels - this helps me bring order and organization to all of my work, in addition to keeping it transparent to anyone else that can help

- b. For instance, accounts-burlington allows me to centralize all communication and planning on how our team will work to close Burlington
  - c. I can invite cross functional members to collaborate on here, instead of having to spin up different threads
    - i. Use this as a point to ask how their sales team stays on top of their many individual accounts via email
  - d. I know I will work closely with Burlington as my colleague Noah just pointed out that we have executive involvement and finally built momentum. With Slack, I can easily prioritize my workflow by starring this
    - i. Star this channel
    - ii. Consider discussing benefits relevant to \*their business case\* and continue discovery as to how else Starring may help
  - e. In order for our company to truly close more deals, ensuring the internal collaboration within and between teams is as efficient and transparent as possible ends up being the most important variable
  - f. Our sales leadership team, Jodie, is actively involved and I can quickly see that she intends to email our contact there about our commitment
  - g. Since Slack ties not only the people I need to work with but also the tools I am \*already using\*, I can integrate Salesforce directly into this conversation and Jodie can quickly find the Salesforce contact information without having to log-in to Salesforce
    - i. Draw them into a discussion on how Jodie could have done this entirely on mobile. As an executive, it stands to reason she may not be in front of her computer all the time
    - ii. Draw additional attention to the fact that Slack is acting as a central place to organize all customer information
    - iii. Use this as a pivot point to dig into how their mobile experience is? How much can they accomplish?
  - h. I can see this information being very relevant to the channel and our team needing this frequently. To help everyone in the future, I'm going to pin this item to this channel. Now anyone who views this channel can quickly self-help with information like this and other important points
    - i. Pin the Salesforce message
    - 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
  - i. Working closely with our legal team who was invited into this to provide all relevant context, our legal counsel Miguel can easily see certain contractual requirements our customer may have that are centrally stored in our company's file collaboration service, Box
3. Search for “deal requests” in search bar of **#accounts-burlington** in order to navigate to the **#deal-requests** channel [Note: You won’t have to type out both key words, Slack search will autocomplete this for you. Time permitting, you may wish to talk about search here and if needed can optionally search for “Edna Frank” to show full text search]
- a. (within **#deal-requests**) Our company is very cross functional and we work with our Solutions Engineers in many engagements
  - b. In this channel, Sales Reps like myself can ask for assistance in our engagements and have those Salesforce tickets pipe into this channel for our management, Trisha, to review and assign
  - c. In this case, I’m asking for help with a deep dive for our API Connect product
    - i. Apply “eyes” emoji to Trisha’s comment

- ii. Create thread
  - d. Since I know I've verified the opp, I can let Trisha know I've seen her question and quickly reply back with a neatly threaded message without disrupting the flow of channel conversation
    - i. Type that you've verified the opportunity here and end with "white green check mark" emoji to Trisha's thread
4. Click into #deal-assignments
- a. Once our Solutions Engineering management team have enough information, their assignments to our dedicated SEs will go into their own channels where the SEs can set custom highlight words so they can stay on top of their queue
  - b. Our SEs, whether in the office or in the field, have instant access to the channel, the opportunity, and of course the additional context from our applications at their fingertips and can immediately help
5. Click into #sales-eng-help
- a. Sometimes though, our sales team may need the expert help of all of our Solutions Engineering team without having a solid opportunity
  - b. We have an ask-me-anything forum where our smart SEs can jump in and address general questions
  - c. The neat thing here is that everything answered becomes searchable, as Slack is of course archiving all of this to be an information repository
  - d. Our very own initiative with Burlington's request for API Connector can be quickly answered so I can reply back to our customer faster than ever
    - i. Draw parallels to where an AE today in their organization can find information. How is this efficient or inefficient? What is the experience like? Insert your own favorite question!
    - ii. Ask how they work with their cross functional partners

6. Done