

# Finance

[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	• #announcements-fin
• #board	• #proj-finreport
• #bizops	• #accounting-marketing
• #exec-ama	• #help-finance

## 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 - In this story, we'll explore how a finance team can leverage Slack to collaborate together on very important content such as a fiscal report with the help of automation and integrated tools, provide a place for cross functional members to ask finance questions to create a knowledge system, and allow the CFO and the Finance leadership to broadcast critical department-specific messages

1. Click into #announcements-fin
- a. Similar to a global announcements, Slack lets me stay on top of my own immediate team's announcements with our department channel
  - b. Our CFO reported we blew past our revenue targets, and our team is enthusiastically celebrating!
    - i. Hover over emoji responses
  - c. A lot of our team is dispersed globally
    - i. Click on Johann's name and draw focus to timezone - whatever time zone you see, state that you could be in another one
  - d. And in this channel, our team culture isn't impacted at all; in fact, it's stronger
  - e. Within a few seconds, our integration with a Stats application tells me that we hit a new record for our recurring revenue - > 500 Million
    - i. Use as a discussion point to discuss the level of transparency their organization has today
  - f. This is great because Statsbot will proactively let our team know how we are tracking without me ever having to find out manually
2. Click into #proj-finreport1
- a. As a finance manager, I can use Slack to get work done

- b. In our secure private channel, we're collaborating together with senior leadership on our upcoming financial report, and using Trello directly with Slack our team is able to stay atop of our progress
  - c. 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
  - d. Even if new team members have been added in, they are able to quickly get up to speed
    - 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?
  - e. 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
  - f. Our team also uses Slack to collect agenda requests from our team prior to our weekly meetings with automated messaging from Slackbot
    - i. Discuss their current business flow for either agenda, meeting minutes, or weekly status updates
  - g. With Slackbot, we can have Slack work for us and take off load from our leadership team and ensure everyone is on the same page with the appropriate level of visibility
3. Click into **#accounting-marketing**
- a. With Slack, the accounting team has a very easy way to address open questions around marketing invoices, POs, or address any approvals for certain invoices
  - b. This provides the needed visibility our internal teams need to ensure we are capturing all information related to the financial health
  - c. By integrating our file collaboration system, people can easily share files giving full context within the conversation and ensuring our team is able to promptly help
    - i. Hit plus button on message bar and highlight various content repositories like GDrive, Box, Dropbox, OneDrive, or their own computer
  - d. These files will now easily be accessible within this channel for future reference
4. Click into **#help-finance**
- a. With Slack, we can create independent channels to address topic related questions such as those around accounting we just saw, or general questions within finance
  - b. Since many of us are constantly in meetings, traveling, or working, we've created some intelligent Bots to help answer commonly asked questions
  - c. With FinBot, my finance team is not spending all their time answering questions and can focus on higher value activity
  - d. Additionally, with Slack we can use red/blue/white emoji to signify urgency in a more visual manner ensuring important requests don't get lost in the queue
  - e. This benefits both our finance team as well as employees
  - f. Slack makes this process a breeze to provide our team some added muscle
  - g. We've managed to tremendously cut down our time to answer, and in effect we've turned this channel into its own knowledge repository!
    - i. You can discuss how you can search for phrases to find out if it's been asked before
5. Done