

Customer Support

[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	• #cs-amer
• #board	• #zendesk-tickets
• #bizops	• #cs-incidents
• #exec-ama	• #triage-support
• #cs-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

Introduce demo story - Slack for Customer Support presents a few channels that allow various support agents and regions to discuss pertinent matters such as announcements, region-specific tickets, integrations with ticketing systems like Zendesk, as well as provide a mechanism for ticket escalation so that customer confidence is kept at an all time high. Slack enables Customer Support organizations to rapidly collaborate and troubleshoot any customer issue.

1. Click into #cs-announcements
- a. Similar to a global announcements, Slack lets me stay on top of my own immediate team's announcements with our department channel
 - i. Scroll up a bit to view Katie's "Headlines for the Week of" post
 - b. Very quickly, I can use Slack to glance that our VP of CS, Katie, has included some important tidbits from our company all hands, as well as a snapshot of major incidents that we had
 - c. Upcoming changes to our toolsets are also easily seen like this one for our automation of Zendesk, something that I may have missed in email since my inbox may continue both customer related tickets as well as team announcements in the past
2. optional Click into #cs-amer
- a. And this can happen both departmentally, as well as more granularly at my local region - in this case, I am based out of the North America region
 - i. Briefly highlight cs-apac as well for that region but don't click into it unless pertinent
 - b. Team planning at our organization as digitized completely, and with Slack we are able to present the topics for our upcoming meetings and provide our team to submit requests and feedback

- c. I can share critical knowledge with my team and since Slack is making all content archivable, I can come back to anything I may need in the future
 - d. With our rapidly growing team, this helps new hires access information, hit the ground running, and greatly reduce the ramping period
3. Click into **#zendesk-tickets**
- a. As a CS representative, I can use Slack to centralize all of the tasks and tools required to do my job
 - b. Our team has integrated Zendesk directly into a dedicated channel
 - c. As new tickets come in, I can be assured someone is working on them because of the “eyes” emoji
 - i. Click into the Jacob Sinclair ticket
 - ii. Hover briefly over “eyes” emoji
 - d. Because of this, Slack lets me discuss these matters in a neatly threaded message without disrupting the flow of the channel’s alerts
 - e. A new ticket from Jacob Sinclair can be quickly ID’d as an incident and provides valuable context for which I would have otherwise had to open up a tab, go to Zendesk, log-in, and find the ticket once I was able to find the specific email alert
 - f. Our business workflow has moved completely onto Slack where I have access to not only subject matter experts, but I can easily loop in others to help me close this ticket and report back to the customer
 - g. Without the additional Zendesk context switch, I can grab the ticket directly from within Slack through message buttons
 - i. Highlight “Take Ticket” button (but don’t actually click it)
 - ii. You can frame this as “i won’t actually click this as I don’t want to create a ticket now”
 - h. This keeps me in Slack, where our team is solving issues
4. Click into **#cs-incidents**
- a. Having just walked into the office, the incident channel will allow me to quickly get up to speed on what the pressing issues are, and provide much needed background
 - b. Before, incidents weren’t properly conveyed, so it was hard for me to empathize with my customer as I had to rush first to catch up on what our engineering team discovered
 - c. With Slack, the incidents become much easier to dissect (as well as solve for our engineering team)
5. Click into **#triage-support**
- a. With my workflow to solve tickets entirely within Slack, our triage channel provides our Sales counterparts a way to easily escalate Tier 1 customers
 - b. This way, Slack is unifying the Sales and Customer Support teams providing a single face for the customer, dramatically increasing customer retention and NPS scores (if relevant)
 - c. Through Emoji, they can help with priority levels such as “when you can, asap, and urgent”
 - i. Highlight blue circle and white circle emojis
 - d. We let our Sales team know when we’ve solved their problem with a simple green emoji
 - e. Zendesk can pipe in additional ticket details directly within Channel providing me more context if needed
 - f. 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. Discussion point: How are you guys tracking against your Mean Time to Resolution for customer tickets?

6. Done