Slack Launch Guide

PDF: Launch Guide for Slack Partners

Welcome to Slack: Work Reimagined

Your firm is moving to Slack: a single platform where your people, knowledge, tools, and clients come together. This guide walks you through everything you need to launch successfully.

Getting Started: Make a copy of this canvas to serve as your Slack rollout plan.

This document is based on Ent+ Slack type. If you are using Slack free plans, you will notice a difference in features in your plan.

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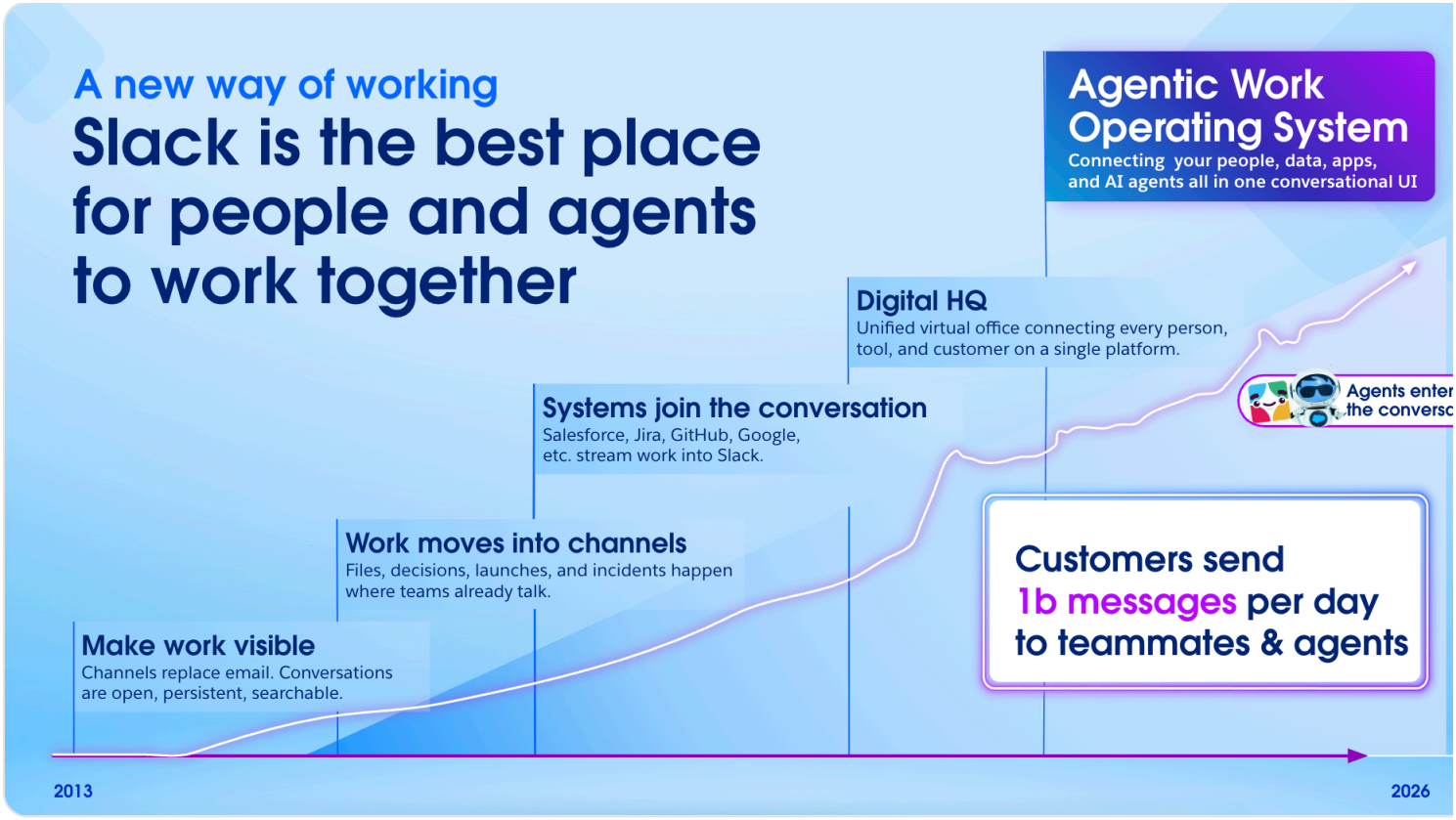
Step 11: Maturity

What is Slack?

Slack Is Your Agentic Work OS



Slack is your Agentic Work Operating System bringing humans and agents into every conversation, driving work at AI speed. It's not just a messaging app. It's the operating system for how your firm works: a single platform where your people, knowledge, tools, and clients come together.



Why Slack is different:

Conversation is how humans naturally collaborate and solve problems and it's the only way humans and AI can truly work as teammates in the same space. Slack's uniquely open and connected platform preserves context naturally, creating a living knowledge graph where every decision, insight, and file becomes instantly searchable.

- Channels organize work by engagement, practice area, and function, not by inbox
- Slack Connect puts you in shared channels with your clients and contractors for real-time collaboration
- Slackbot your personal AI agent for work, built right into Slack with zero setup required
- Workflow Builder automates the repetitive stuff: staffing requests, status updates, onboarding checklists, approvals
- Integrations with Salesforce, Jira, ServiceNow, Google Workspace, Microsoft 365, and 2,600+ more apps
- Slack AI and Enterprise Search summarizes conversations, surfaces knowledge, and helps your team move faster
- Huddles for quick audio/video calls that replace unnecessary scheduled meetings
- Canvases and Lists are living documents and trackers that stay connected to conversations

New to Slack? Learn the basics in our 101 workshop

- Slack 101 Workshop

Get started!

- 💻 On your PC or Mac:
  - Download the Slack app at: slack.com/downloads
  - Or join from your browser at: slack.com/signin
- 📱 On your mobile device:
  - Android: https://slack.com/downloads/android
  - iOS: https://slack.com/downloads/ios

Define Your Vision

Step 1: Define Your Vision, Goals, and Team

Before configuring anything, align on why you're launching Slack and who will drive it.

Define Your Slack Vision

How can Slack benefit your organization and power your strategic priorities? Think of the benefits at several layers of your organization:

1. Enterprise - communications, operational processes, security protocols
2. Teams - onboarding, pipeline management, strategic account planning, case swarming
3. Employees - responding to clients, delivering work, getting feedback, etc

💡 **Frame your vision around the value Slack delivers:**

- Faster, AI-powered decision making and team alignment
- Increased employee productivity and engagement
- Reduced context-switching
- Improved knowledge-sharing
- Real-time collaboration with clients and external partners
- Automated workflows that eliminate manual processes

Articulate your vision in a few sentences that you can share broadly.

> 🔮 **Sample Vision 1**
>
> At our company, Slack will be the universal platform for AI-enabled collaboration and productivity. Our employees will feel more engaged and connected, while increasing their focus on high-value work in support of our ambitious goals for growth.

🔮 **Sample Vision 2**

Slack will provide a secure platform for all critical work. It will be employee-centric, sustainably administered, and ar engine for enhanced productivity. Slack will contribute to a strong security posture and improve the ROI from our fu tech stack.

Define your Goals

With these areas of focus in mind, what change or impact do you hope to see as a result of implementing Slack? Frame the benefits you've identified into measurable goals.

`Sample Goal Definition Framework`

Strategic Priority	Related Slack Goal	Target Metric / Outcome	Metrics Source *(eg survey, Slack analytics)*	Frequency of Reporting

Identify Your Slack Launch Team

Depending on your organization's needs and the scope of your implementation, you may have multiple people in these roles or one person in multiple roles.

- **Executive sponsor**: This person, often an Executive, holds the vision and propels change. They marshal necessary organizational resources and send out communications to cultivate awareness throughout the launch process.
- **Technical lead**: Acts as the decision maker and primary contact for technical decisions, including Slack configuration, integrations, security, and governance.
- **Slack Product Owner:** Drives the Slack strategy from rollout through maturity. Manage the Slack roadmap and ongoing maintenance, optimization, and alignment to strategic business priorities.
- **Project manager**: Keeps everything in line to ensure a successful launch, including coordinating all stakeholders.
- **Slack admin:** Responsible for hands-on-keyboard configuration for launch setup and the day-to-day administration of Slack.
- Champions network, comprising department leads and power users: This group of Slack enthusiasts spearheads department engagement, providing user education and insights and nurturing the continuous growth and maturity of Slack across the organization. As internal advocates and influencers, they play a pivotal role in encouraging positive adoption and usage of the platform.
- **Internal Communications & Enablement**: We suggest collaborating with your Internal Communications & Enablement teams to assist in crafting the messaging and training for Slack, and ensuring the information is effectively distributed across departments and teams.

Slack Organization Design

Step 2: Slack Organization Design

Design the organizational structure, policies, and channel architecture that will power your Slack workspace.

Access Slack Enterprise Grid

First things first: Let's get into your Slack Enterprise Grid environment. Locate the email with your license details and start the set up. Follow the guide below, but skip any migration-related steps since you are setting up a net new instance.

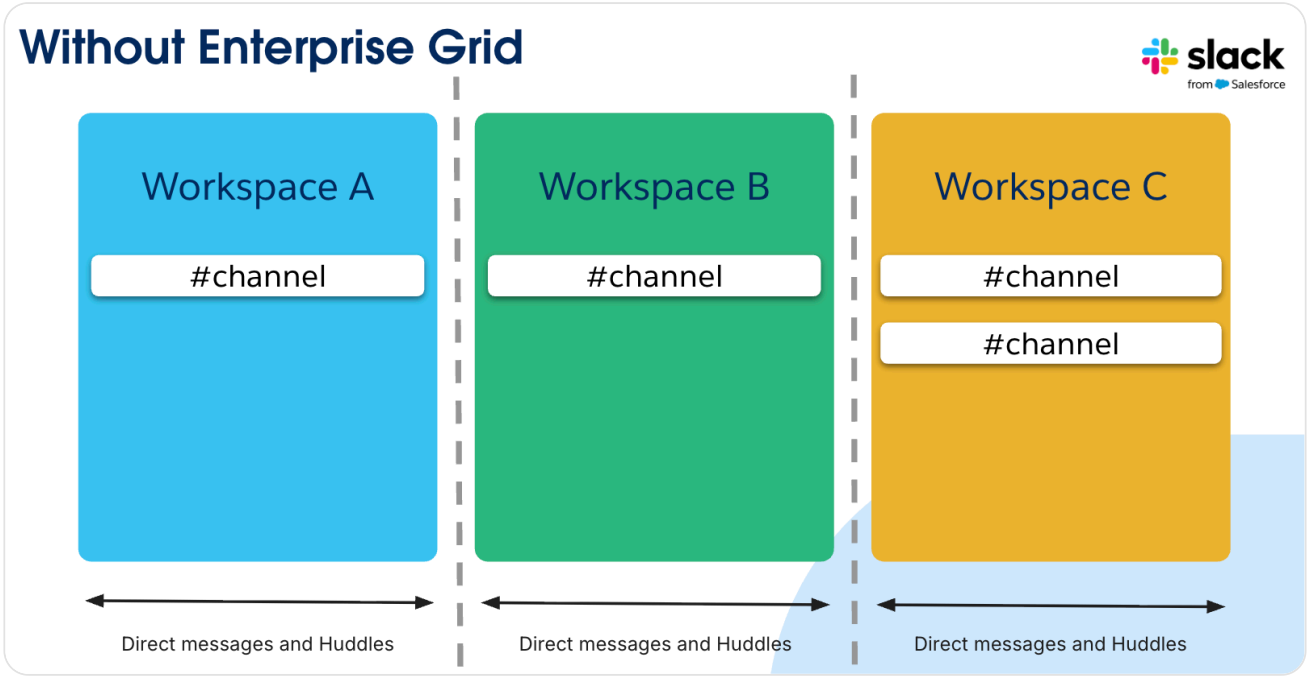
Enterprise Org Launch Guide

Grid & Workspace Design

What is a workspace?

A Slack workspace can be understood as an apartment— it's a container that houses multiple channels, apps, users, and settings unique to that environment. Slack workspaces can exist as standalone environments, outside of an Enterprise Grid (see info on our Free, Pro, and Business+ plans).

In a standalone workspace environment, members of two separate workspaces can't send direct messages (DMs) to users in other workspaces and it's not possible to view content in other workspaces without first being added to that workspace.

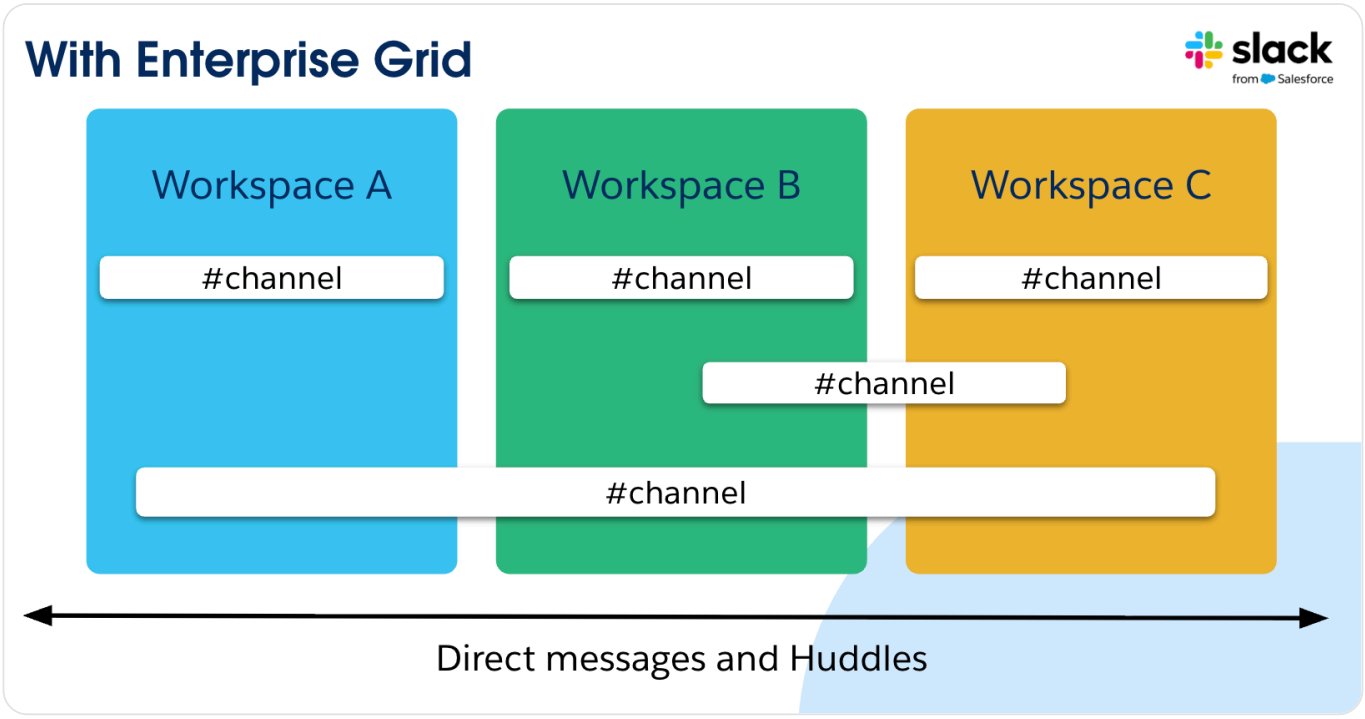


What is Slack Enterprise Grid?

Slack Enterprise Grid is a multi-workspace architecture which allows the ability to connect and manage multiple workspaces with centralized admin controls and cross-workspace channel management across your organization. Users are able to send direct messages (DMs) to users in other workspaces inside the Grid, channels can be shared across all or a select number of workspaces in the Grid, and apps and settings can be applied globally across the Grid or selectively at the workspace level. Users are also able to search across the entire Grid (though they are only able to see & access data that's available to them based on their profile & your environment settings, and cannot see anything they don't have permission to view, like private channels or direct messages they aren't a part of).

Your version of Grid, Slack Enterprise+ , offers the most advanced security and AI features. Note: users' access to

Once you have done your initial set up, you are ready to start setting up your workspaces.



Grid Design - A Series of Decisions

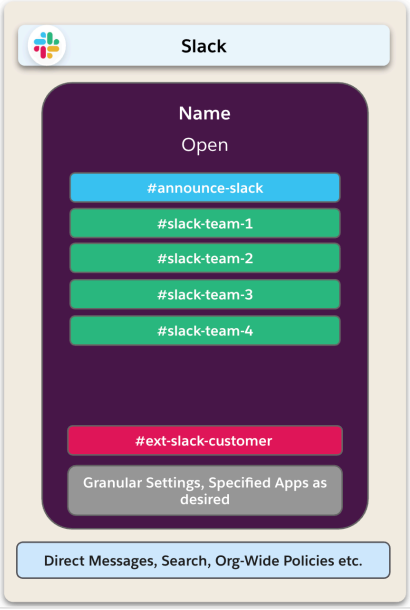
Grid design involves decisions on workspaces, channels, roles, and settings impacting how employees work within your Slack environment. You have the ability to create one or multiple workspaces. Creating workspaces can have both a positive and negative implication for your users as it can create necessary boundaries when needed, but those boundaries can also result in information silos if not created and managed thoughtfully.

Grid Design Model examples

Model 1a

Centralized, global structure

Org-wide channel
Multi-Workspace Channel
Public / Private Channel
Slack Connect Channel (external)
Direct Message



Benefits

- Ease of use: simple to navigate
- Less administrative burden: simplifies administrative model (multi-workspace channels requests, workspace admins)
- More agile (for frequent org changes)
- Ability to work cross-functionally

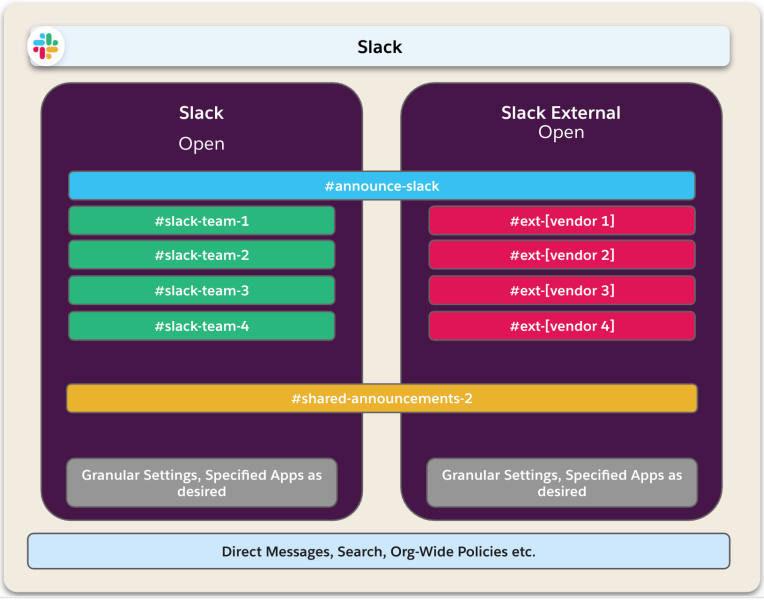
Considerations

- Potential channel overload for end users
- Potential for private channel usage over public channels
- Requires heavy enablement around channel naming and channel organization to maximize efficiency long-term
- Any app configuration needs by BU?
- No dedicated External workspace with different policies and settings - decreased security for teams working with external parties

Model 2

Centralized + external

Org-wide channel
Multi-Workspace Channel
Public / Private Channel
Slack Connect Channel (external)
Direct Message



Benefits

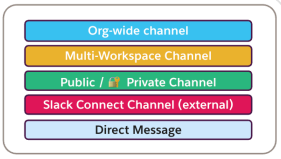
- Less burden: simplifies administrative model; less administrative burden (multi-workspace channels requests)
- Dedicated External workspace with different policies and settings - increased security for teams working with external parties
- More agile (for frequent org changes)
- Reduced potential for channel overload for end users
- Workflow can be created to automatically welcome new users to external WS

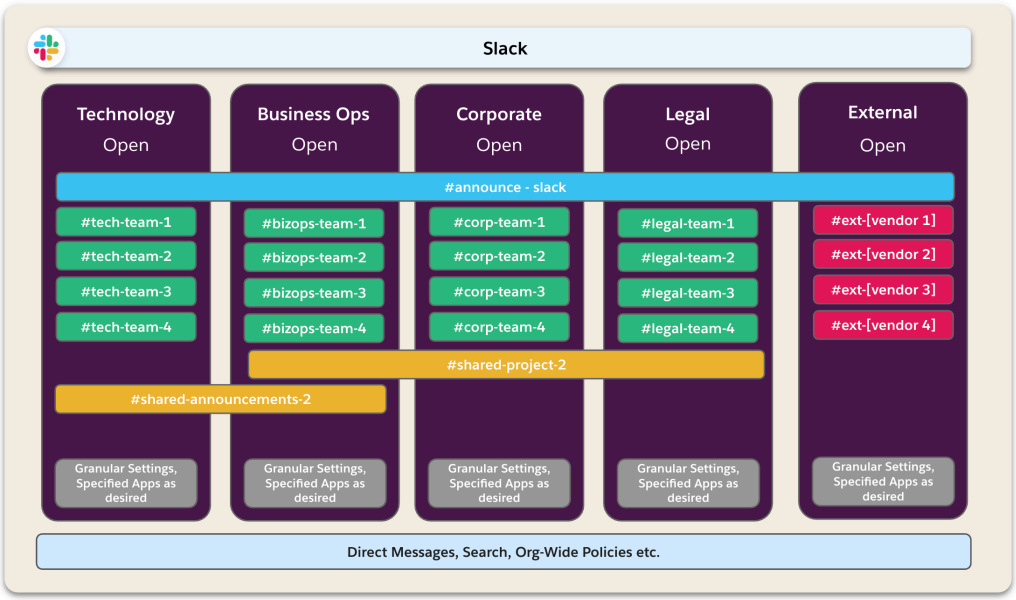
Considerations

- Potential for channel overload for end users
- Potential for private channel usage over public channels
- Requires enablement around channel naming and channel organization to maximize efficiency long-term
- Enablement around External workspace, SOPs for working externally, etc.

Model 3

Dispersed workspaces, mirror org chart





Benefits

- Dedicated private workspaces for confidential conversations
- Potential to feel more comfortable working in public channels
- Restrict “Legal” WS access to Hidden to avoid employees joining workspaces without clear business reason

Considerations

- Higher complexity
- Risk of workspace sprawl
- Higher admin overhead
- Higher demand for multi-workspace channels
- App configuration needs by each workspace
- Enablement around how to request multi-workspace channels

[How to create a workspace]

Benefits of a Thoughtful Grid Design

- For Executives: Maximize visibility, effectively use administrative controls, and mirror company organization.
- Admins: Ensure needed controls over org vs. workspaces vs. users, clearly articulate workspace/channel strategy, and enable Workspace Admins.
- For Individuals: Enable sharing and transparent communication, reduce context switching, reduce noise, and increase focus.

Design Guidelines

These are principles to guide your design:

- Create an intuitive grid structure: Design workspaces around how information is shared and collaborated on, which may or may not be based on your Org chart.
- Org vs. workspace admin controls: What is the necessary balance between organization-wide administration and granular workspace settings?
- Business needs: are workspaces created out of necessity and technical feasibility, rather than as substitutes for channels (e.g. can a private channel create the necessary boundary vs a net new workspace)?
- Future proof your grid design: Decisions should be informed by the current state and your desired Slack ambition.
- Use Multi-Workspace Channels and Slack Connect: Utilize multi-workspace channels for cross-functional collaboration and shared channels for external teams.

Set your Slack policies & settings in the admin dashboard

The admin dashboard is where Slack org admins can customize all the specific settings & permissions as well as manage Slack. To navigate to your Slack org settings:

1. Open Slack on desktop → Go to Home
2. Click your organization name in the left sidebar
3. Select Tools & settings from the menu
4. "Organization settings"

Guide to the Slack Admin Dashboard

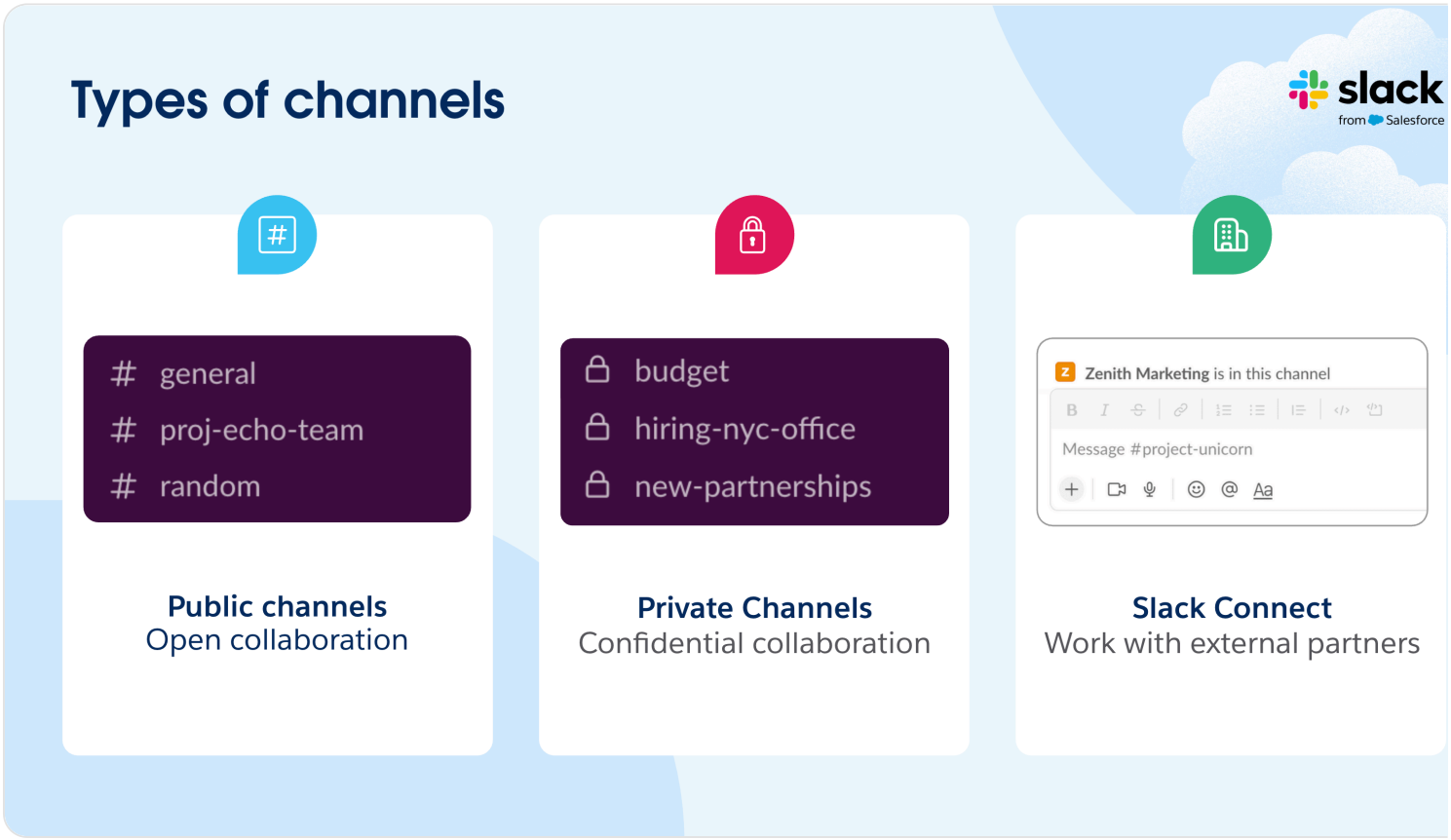
Channel Design

Channels are where work happens in Slack. They organize your people, data, apps, workflows, and AI agents around outcomes instead of org charts or inboxes. Without channels, work lives in scattered DMs, emails, and conference calls. With channels, everything is open, searchable, and in context.

Types of Channels

Channels can be connected to one or multiple workspaces for cross functional work. Types of channels include:

- Public Channels: these are open to view or join by any user who has access to the workspace(s) where the channel lives, and the channel and its contents are searchable for all users.
- Private Channels: users must be proactively added to these channels by an existing channel member, and the channel and its contents are only viewable and searchable by the channel members.



Keep Channels Open

As a best practice, we recommend that you permit all users to create channels and encourage them to create **public** channels by default. This way, you avoid information silos and enable users to create, join, and leave all channels as their work requires. Find more information on channel management settings here.

Slack Connect Channels

Channels can also be shared externally with other **paid** Slack environments: these are called Slack Connect channels. In order to share a channel with an external Slack organization, a member of one of the Slack environments must send an invitation to the external organization, who then must accept it. You can add up to 250 orgs to one Slack connect channel.

Like other channels in Slack, people in your Slack environment can join the channel or be added to it by someone else from their organization. And Slack Connect channels can be public or private, and can live in one workspace or be shared across multiple workspaces.

Additionally, people from different organizations working together in Slack Connect channels can send each other DMs. To work in a group DM, everyone in the conversation must be in at least one Slack Connect channel together.

Managing Slack Connect

You are able to determine which users can join and send invites to Slack Connect channels and DM with external users, the type of access external users have to retain data in the channel, whether external users can use workflows in the channel created by your organization, and more via these settings:

Guide to managing Slack Connect channels

Data security in Slack Connect channels

This article outlines how data in Slack Connect channels is protected by our enterprise-grade security, as well as options for additional guardrails you can put in place to secure your information. You can also manage people in external channels from the Slack Connect external people dashboard.

Default Channels

Channels that members are automatically added to when they join an org/workspace. They ensure that everyone starts with access to the most important conversations from day one. Here are instructions for setting your default channels

The general channel

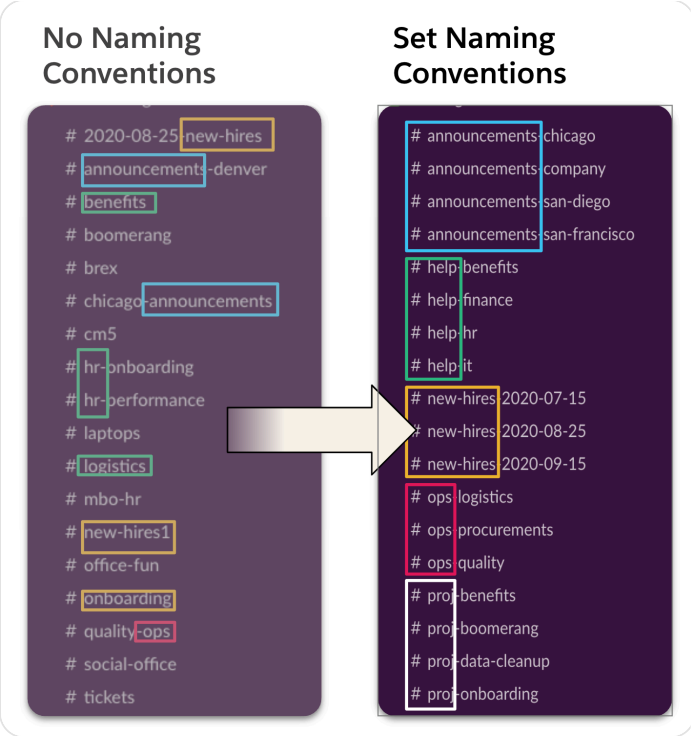
Every Slack workspace is created with a general channel, which is the only channel that members (but not guests) a automatically added to and unable to leave. This channel works best when it's used for sharing workspace-wide announcements, and cannot be archived, deleted, or converted to private.

Why channel naming is important

Creating and sharing channel naming conventions for Slack channels help standardize the user experience

across Slack and maintain an organized environment. Users can determine where relevant work is happening and find answers to questions quickly.

- Keeps conversations on topic
- Makes it easy to find new channels
- Allows for quicker access to critical information and people
- Keeps the channel sidebar organized
- Allows users to quickly determine if a channel already exists, or if it needs to be created
- Establishes guidelines for a uniform user experience



Channel Examples & Recommendations

Company wide Channels

Channel Type	Purpose	Example
Announcements - Company	Important updates for everyone	`#announcements-company`
Announcements- Practice	Important updates for a certain practice or department	`#announcements-practice`
Announcements - Location	Important updates for a certain office or location	`#announcements-sf`
Help	Single place for employees to go for assistance	`#help-people`, `#help-it`, `#help-slack`

Team & Project Channels

Channel Type	Purpose	Example
Team	A place for teams to share weekly updates and receive support	`#sales-sf`, `#mktg-brand`
Project	Work on specific projects with your cross-functional partners	`#proj-launch`, `#proj-website`

Employee Engagement Channels

Build a sense of connection, transparency, and belonging:

Channel Type	Purpose	Example
Culture channels	Celebrate your company values	`#kudos`, `#ama`, `#wellness`
ERG channels	Foster diversity and inclusion	`#women`, `#parents`, `#veterans`
Social channels	Create connection around common interests	`#pets`, `#cooking`, `#remote-tips`

User Groups

For an added layer of organization and efficiency, you can create user groups to notify groups of people at once, rather than mentioning each person individually:

- Example: `@engineers` automatically connects members to `#eng-all`, `#eng-data`, `#eng-ios`, and `#eng-qa`
- Define user groups by department and team

Technical Configuration

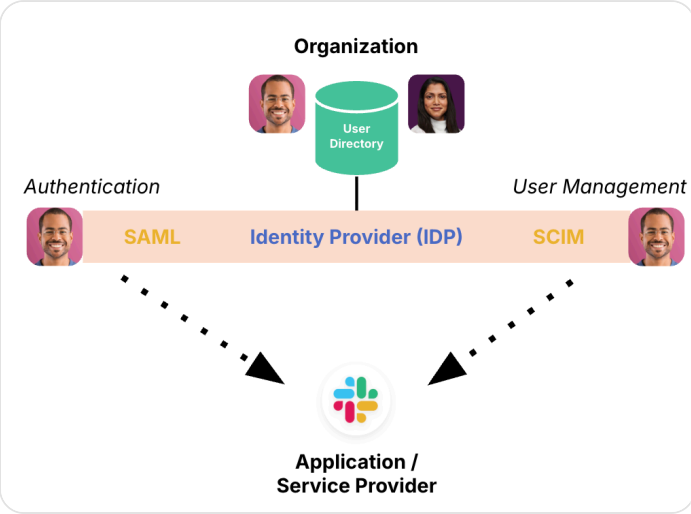
Step 3: Slack Technical Design & Delivery

Slack is secure by design, built on the same enterprise-grade security foundations trusted by 77 of the Fortune 100 companies. Admin controls give you absolute visibility into data access, app permissions, and compliance posture.

Set up these features to establish the technical foundation for a secure, compliant Slack deployment.

Set Up SSO/SCIM Provisioning

- Set up SSO/SAML authentication - Single sign-on enables someone to access multiple applications/services using a single set of login credentials (username/password). With SSO, Slack relies on a trusted third party to verify that users are who they say they are.
- Configure SCIM provisioning for automated user lifecycle management to your IDP groups - SCIM allows IdP Group provisioning, user deactivation, and more detailed user profile syncing.
- Connect your IDP groups to Slack - connect IDP groups to workspaces and to channels making it easier to manage at scale.



Compliance & Security Features

- A guide to Slack's Discovery APIs - Enables compliance teams to programmatically access, export, and manage messages and files across a Slack org for eDiscovery, DLP, and regulatory compliance.
- Configure two-factor authentication - Adds a second layer of login security (SMS or authenticator app) for workspace members.
- Configure audit log anomaly event responses - Set up automated alerts and responses when Slack detects unusual activity (e.g., bulk downloads, suspicious logins) in your org's audit logs.
- Customize data retention - Control how long messages and files are kept in Slack. Set org-wide defaults or per-channel/DM retention policies to meet compliance requirements.
- Claim domains - Verify ownership of your company's email domain so you can discover, manage, or auto-join users with matching email addresses into your Slack org. Prevent users from creating new workspaces with claimed domains.
- Mobile security - Manage how Slack is used on mobile devices — enforce session timeouts, block screen captures, require app lock (Face ID/passcode), and control copy/paste to protect data on personal devices.

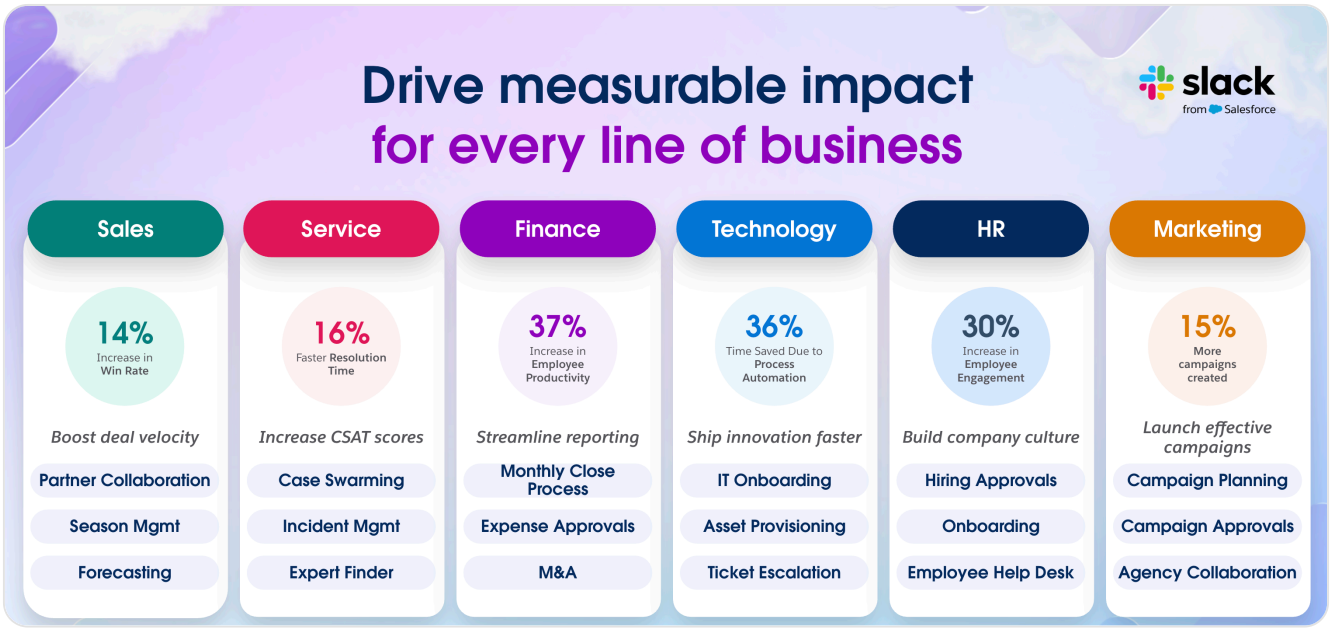
Slack Use Cases

Step 4: Use Case Design & Deliver

Define how different lines of business will use Slack, connect your critical tools, and automate workflows.

Define Your Day 1 Use Cases

Every line of business sees measurable improvements when they operate in Slack. Identify 2-3 high-impact use cases for your initial rollout. Use case ideas could include:



Connect Your Tools

There are 2,600+ apps ready to install in Slack, with 1.7M apps actively used each week. The most innovative ecosystem is building on Slack. OpenAI, Anthropic, Google, Perplexity, and Dropbox are all building agents directly into the platform.

Enterprise Search: Expand Slack's search to synthesize results from your tool stack (see more in the Slack AI section below)

Productivity Apps: Files, Calls, Calendar, Email, Tasks (OneDrive, Google Drive, Box, Webex, Outlook, Gmail)

Role-Specific Apps: Sales (Salesforce), Support (Zendesk, ServiceNow), Engineering (Jira, GitHub), Marketing (HubSpot), Design (Figma), HR (Workday)

Custom Apps: APIs for custom apps, plus no-code and low-code builders (Zapier, Workato)

Integrate your apps in 4 steps:

1. App governance system: adopt a system for reviewing and approving Slack app requests (more on this in administration & governance section below)
2. Core integrations: roll out broad, trusted integrations for files, calls, email, calendar
3. Apps for all roles and departments: introduce teams to Slack integrations with tools they already use
4. Custom apps: use Slack's API to build apps that deliver insights, automate workflows, and optimize your business

Workflow Builder Automation

Use Workflow Builder to automate repetitive processes, no code required:

- [ ] **New Hire Onboarding**: automated welcome messages, checklist delivery, buddy assignment
- [ ] **Project Kickoff**: template channel creation with pre-loaded resources
- [ ] **Time/Expense Reminders**: weekly prompts for timesheet and expense submissions

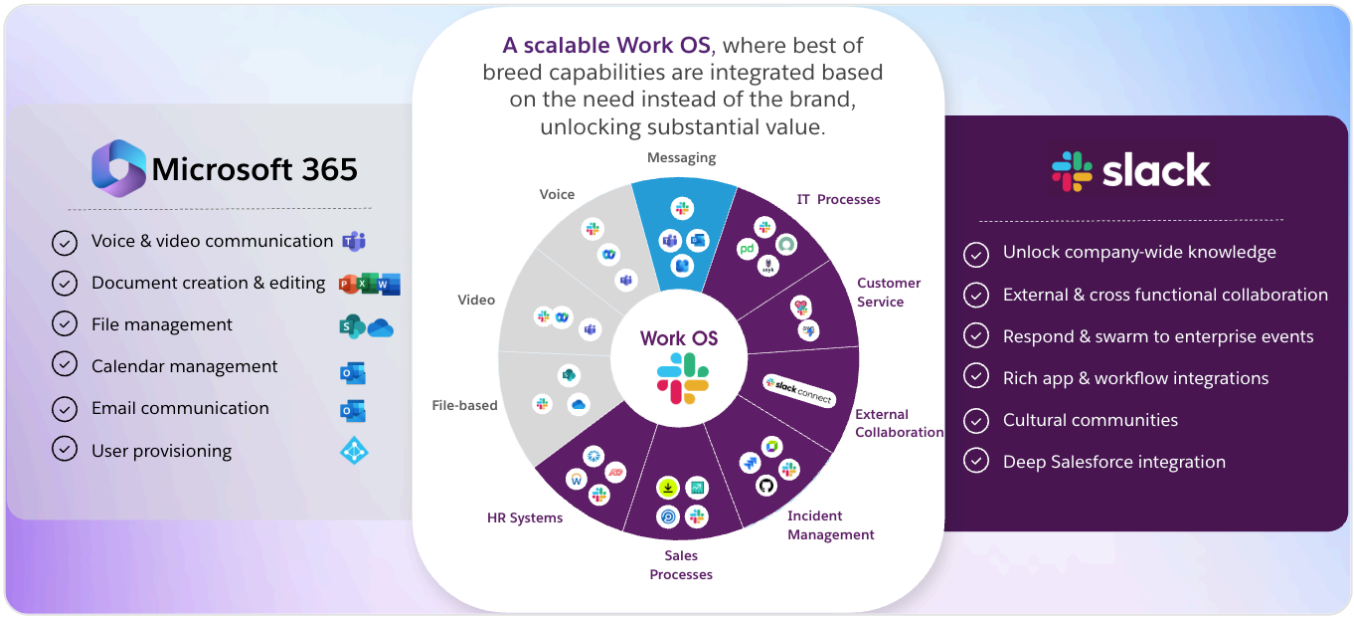
- [ ] **Staffing Requests**: standardized form for requesting team members on engagements
- [ ] **Client Escalation**: routing urgent issues to the right practice lead
- [ ] **Approval Workflows**: SOW sign-offs, expense approvals, staffing decisions with one-click responses

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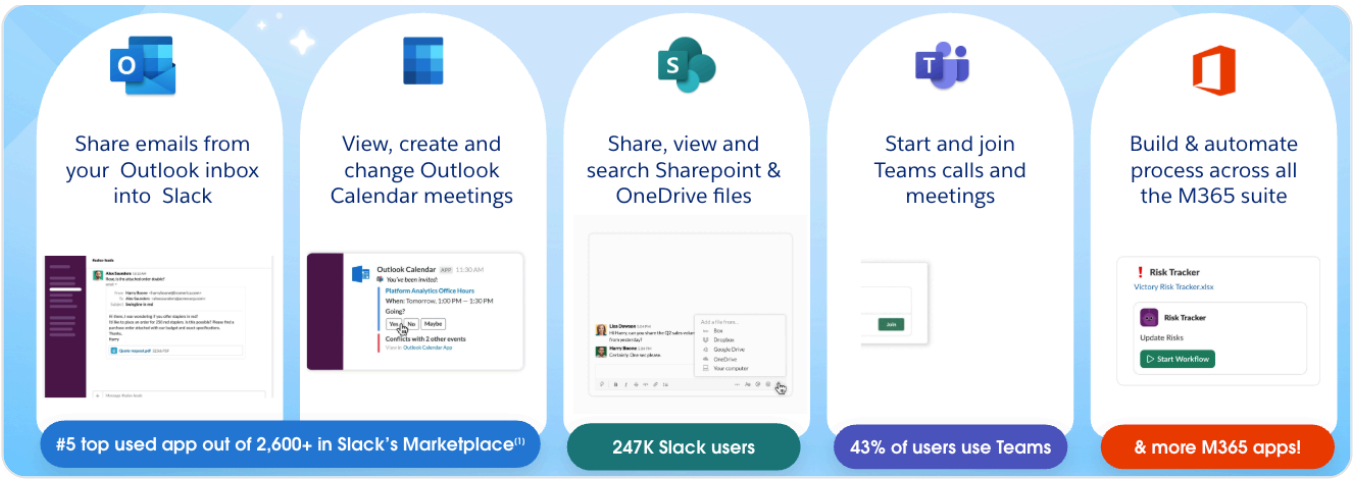
Microsoft Co-Exist

Step 5: Maximize the Value of the MSFT Suite with Slack

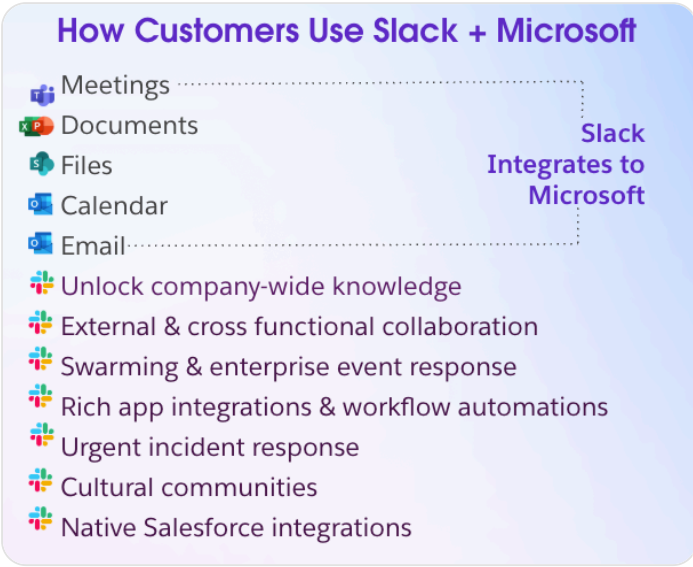
Slack functions as a scalable Work OS, centralizing work across all your applications, including those within the Microsoft ecosystem. We integrate best-of-breed capabilities from your entire tech stack, maximizing the value of your organization's investments and creating a coherent experience for your users.



Over 150,000 customers use Microsoft Apps inside Slack. Outlook is the 5th most used app of 2,600 apps in our marketplace. In fact, 76% of our largest enterprise customers are also Office 365 & Teams customers.



These customers have embraced a co-exist strategy to maximize value. According to a Slack survey, Microsoft customers who adopted Slack saw 76% stronger team alignment, 75% better deal visibility, and 30% less time wasted searching for information.



This demo illustrates the way thousands of customers effectively maximize the value of MSFT Suite with Slack. Extended webinar available here.

Create & Activate your Slack & MSFT Co-Exist Strategy

1. Assess current state:
    a. How are MSFT products currently used at your organization? By whom and in what context?
2. Define future state rules of engagement:
    a. Do current uses of MSFT tools overlap with or duplicate your intended uses and goals for Slack?
    b. If yes: make sure users know when to use Slack vs. other collaboration tools: Create a "what to use, when" guide if needed.

> 💡 Communicate these rules to users early and often, to prevent data silos and communication gaps

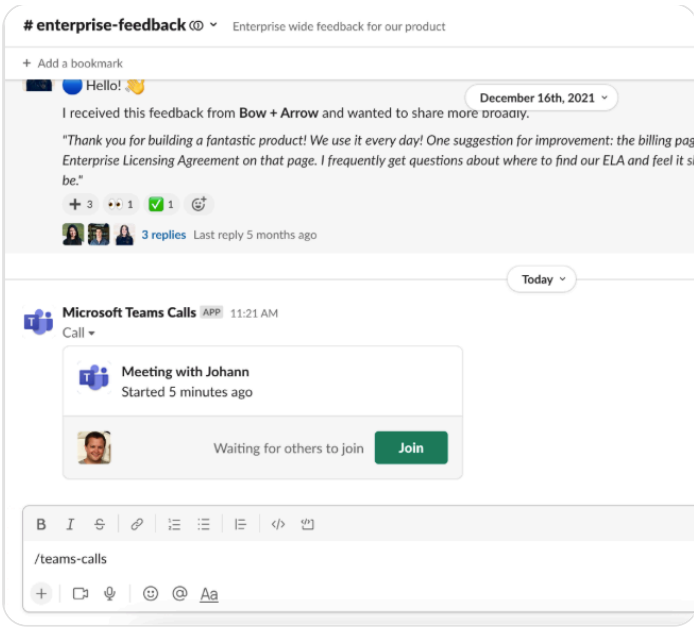
3. Configure MSFT integrations to Slack for example:
    a. Install the Microsoft Teams Calls app to Slack to start and join Microsoft Teams calls right

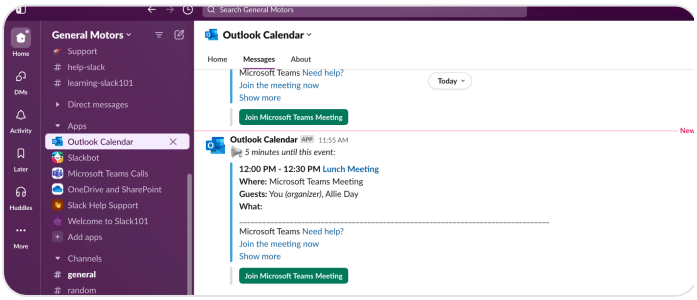
from your workspace. You can also choose to set Microsoft Teams Calls as a default calling app so members can initiate Teams Calls from the phone icon in a channel or direct message (DM).

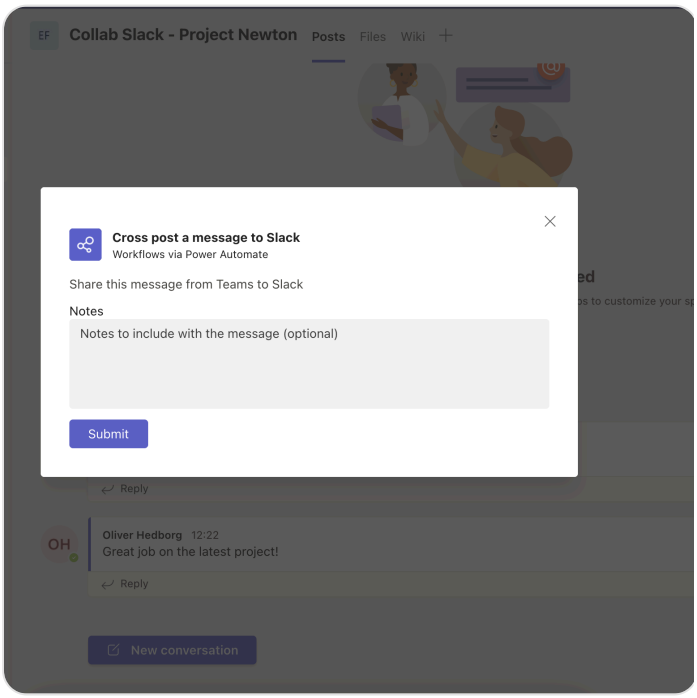
b. With the Outlook Calendar app for Slack, you can stay on top of your 365 Outlook Calendar right from your workspace. Use the app to see a summary of events scheduled in your calendar. Automatically update your Slack status, join video calls, respond to event notifications, see when event details change, and more.

c. Use the Microsoft Outlook email add-in to bring important context out of inboxes, facilitate collaboration between coworkers, and make relevant information visible to all stakeholders. Slack for Outlook is a helpful sidekick that sits alongside your inbox so you can quickly send emails to Slack.

d. You can even leverage Power Automate (flows) to push important Microsoft Teams messages into Slack *(note: You can only push Teams Messages to Slack and not vice versa)*







Slack AI

Step 6: Slack AI & Enterprise Search

Slack has generative AI built natively into the Slack user experience. AI works seamlessly within Slack to help you stay organized and productive. Rather than being a separate tool, it will enhance your natural workflow by handling routine tasks, finding information, files, and managing communications in the background.

We will review the key benefits and setup of these features, available now in your Slack Enterprise+ environment:

1. **Slack AI Features:** AI embedded into the flow of work to provide summaries and action items, translation, automation support, and more
2. **Enterprise Search:** Search across all your connected apps and business systems
3. **Slackbot:** Slackbot is your personal agent for work

💡 *Though we do not dive into it here, Slack also provides the engagement layer for Agentforce.*

⚠️ Customer data never leaves Slack. We do not train large-language models (LLMs) on customer data. Everything runs on Slack's secure infrastructure, meeting the same compliance standards as Slack itself. Learn more about Slack Privacy Principles.

Set up and Get Familiar with Slack AI Features

To enable Slack AI in your environment, follow instructions here. You are able to choose which users have access to these features. Make note of the additional settings for specific AI features.

Note: Managing access to AI features for groups relies on IDP groups. Find more information on access & identity management in the technical configuration section above (section 3 above).

A summary of key Slack AI features & use cases follows. Find a full guide to Slack AI features here.

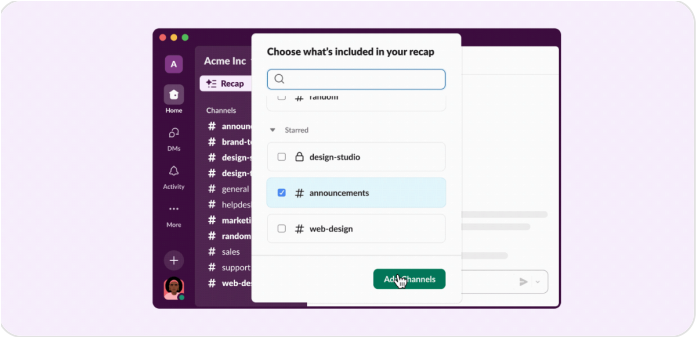
👀 Recaps

Start your day with a recap of channels you're interested in but aren't always active in—rolled up into one easy-to-skim view. Slack AI will help you catch up on any conversations you may have missed in those channels over the past day, while freeing up your time to focus on your most important channels.

🔍 Search answers

Ask a question and get a concise answer based on relevant knowledge in Slack, so you can find what you need faster.

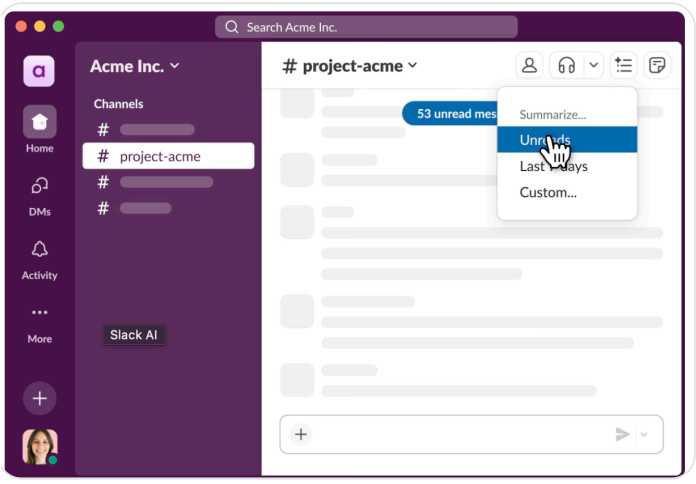
💡 *AI-powered Search answers are different from Enterprise Search. AI Search provides concise answers to search queries based on the available data in Slack only. Enterprise Search enhances search with connected tools.*



Channel & Thread Summaries

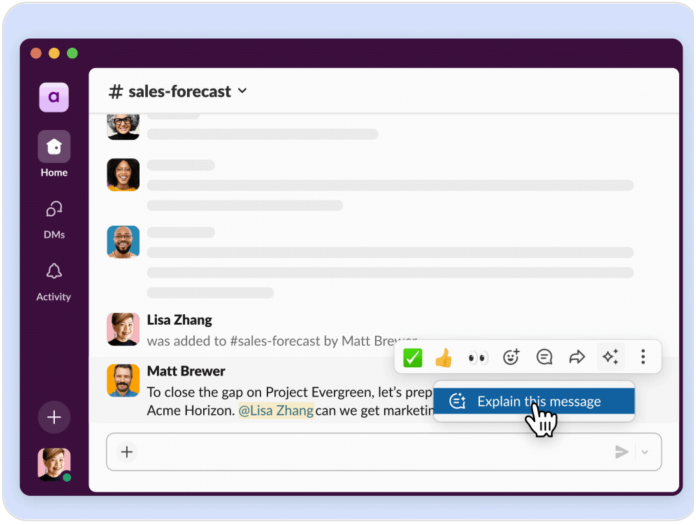
Whether you're returning after a well earned break or getting up to speed on a new project, use the **Summarize channel** and Summarize thread options to get the gist.

💡 *Based on preliminary data, the average Slack AI user saves **53 minutes per week** by leveraging Slack search!*



Instant AI explanations

Members can hover over a message to use AI to generate quick breakdown of its meaning all grounded in the message itself, replies in thread, and other context from the channel or DM it's in. It can also invoke Slack search to incorporate broader context as needed.

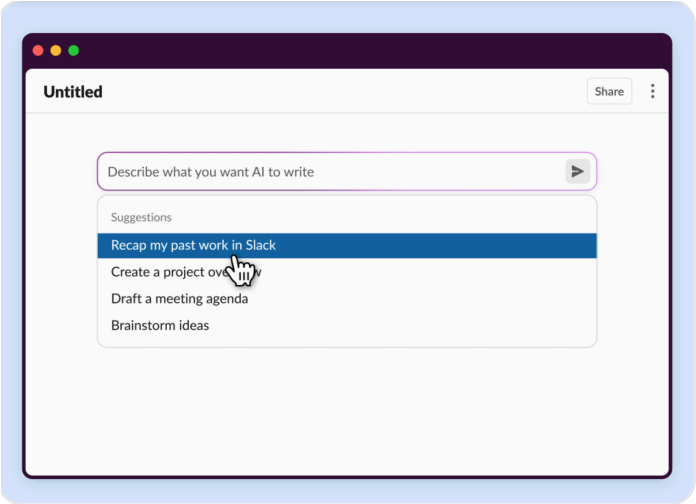


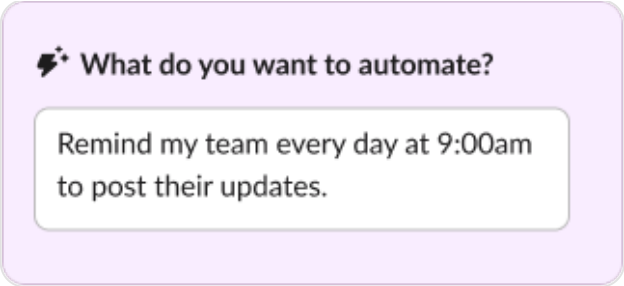
Writing Assistance in Canvas

In a Slack Canvas, use natural language prompts to quickly generate first drafts of content like FAQs, project overviews and more.

Slack AI & Workflow Builder

Users can easily create workflows with natural language prompts. Workflow Builder will generate a workflow with steps for the user to edit before publishing.



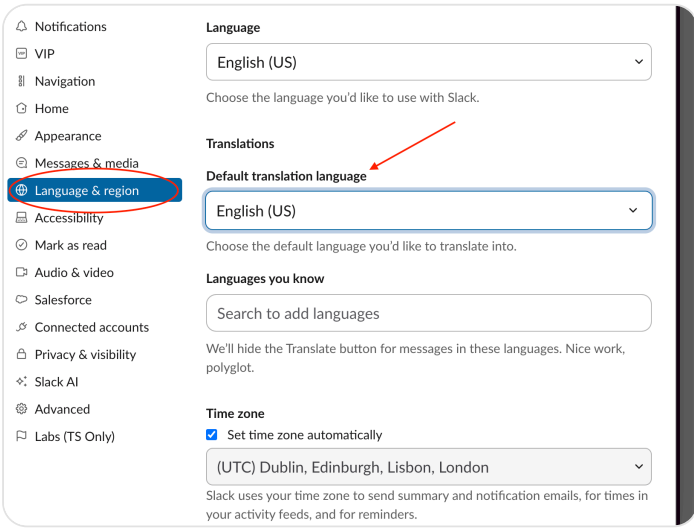


🌎 Translation

When members come across a message in a different language than their designated one, they will see a `Translate` link. The dropdown menu will display the user's default language, but can be adjusted to a different language.

Members can set their Language by clicking their profile picture and going to ***preferences*** ➡️ ***Language & Region***.

You can get translation for any languages. Slack cannot ensure the quality of responses for non-supported languages. Our supported languages include English, German, Spanish, French, Italian, Portuguese, Chinese, Japanese, Korean.



Slackbot

Slackbot is your personal AI agent for work, and the fastest adopted product in Salesforce history. It's built natively into Slack and understands your work context, tone, and style. And, it requires zero setup: by default, all members of a workspace or Enterprise organization can use Slackbot.

Slackbot also becomes the center of your employee agent strategy. As Agentforce and other agents are introduced, Slackbot becomes the trusted front door. Employees don't need to hunt for the right agent or tool. They ask Slackbot, and it coordinates the work across systems and agents behind the scenes.

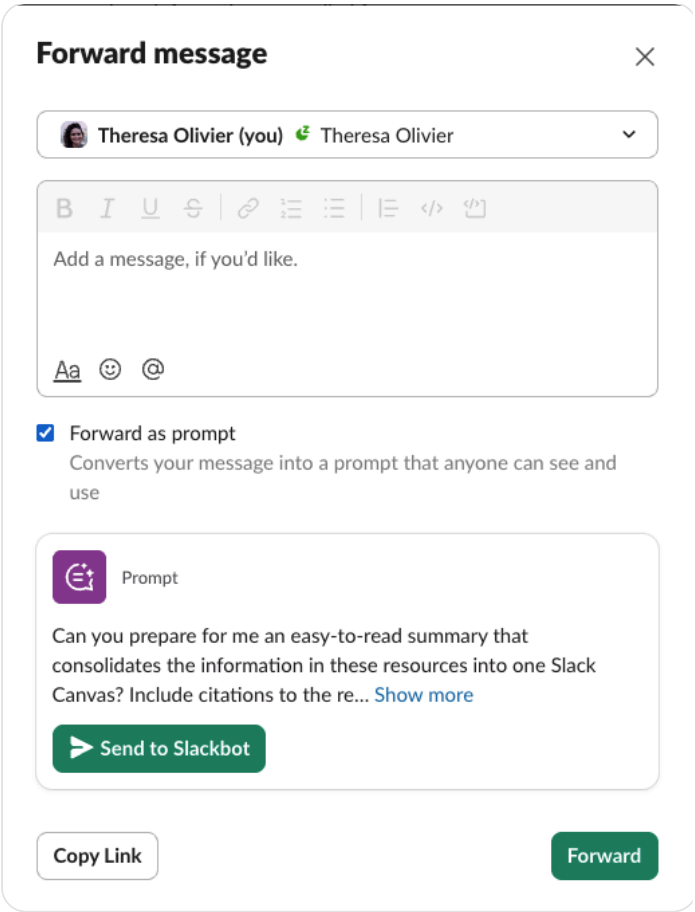
What Slackbot can do:

- Draft meeting notes, project updates, and briefs in seconds
- Instantly convert rough ideas into shared canvases for collaboration

- Manage calendars, surface priorities, and set reminders
- Summarize long conversations and catch you up on what you missed
- Orchestrate work across Agentforce and third-party agents behind the scenes

💡 Users can share Slackbot prompts with their colleagues in just a couple clicks 👉🏻

💡 Use Slackbot skills to create reusable instructions that tell Slackbot exactly how to handle a task. Quarterly reports, event plans, data pulls, if you do it regularly, make it a skill. Anyone can create one, share it with their team, and Slackbot automatically kicks it in when someone asks a relevant question. No setup, no training, just consistent output on autopilot.



Keep in mind

- Responses from Slackbot are based only on information you can view in Slack, and no one using Slackbot can see anything they don't have permission to view (like private channels or direct messages they aren't a part of).
- Slackbot will include content you can access from Enterprise Search data sources in its responses.

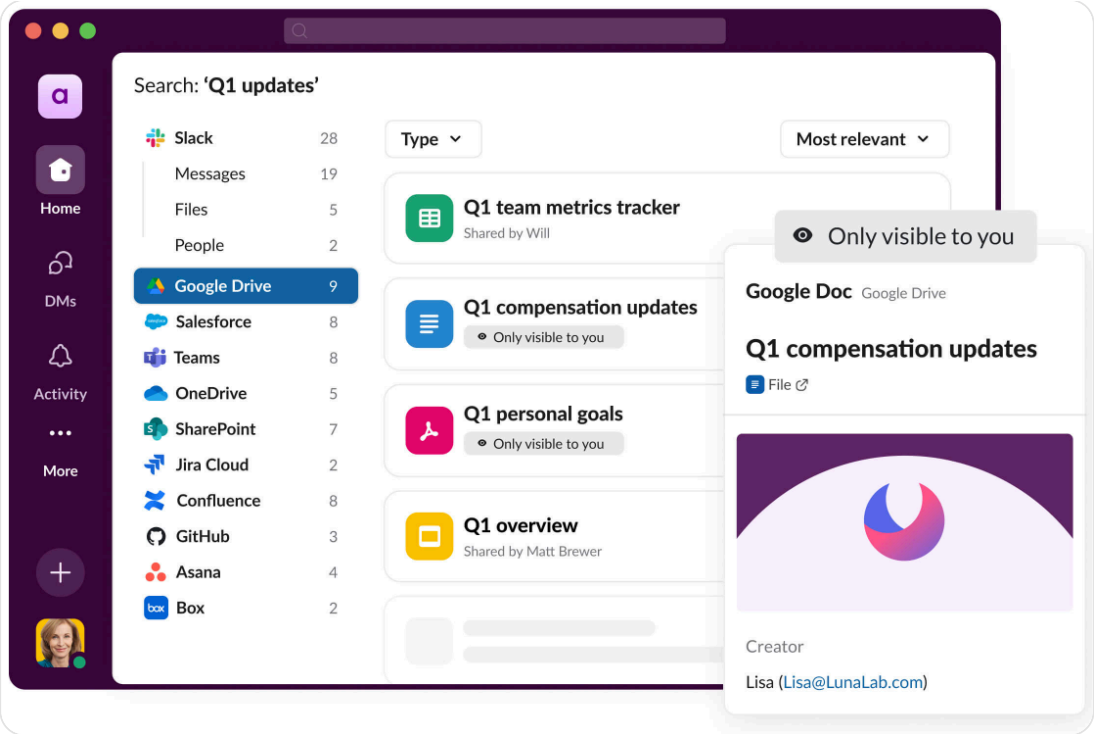
Ready to go further? See the Slackbot Guide for Partners (if you can't access, ensure you are signed up for our PartnerBlazer slack community)

Enterprise Search

Enterprise Search connects to all your enterprise apps and delivers AI-powered results so employees can ask, find, and act from a single search bar in Slack. With Enterprise Search, your team can:

- Search data from internal systems and knowledge bases right in Slack
- Securely search services behind a firewall from within Slack
- Ask natural language questions across connected tools and receive answers with cited sources

Follow instructions here to enable Enterprise Search and connect to cloud applications (Google Drive, Confluence, Jira, Dropbox, Box, OneDrive and more).



Once enterprise search is enabled, members can connect their individual accounts to include content from other sources in search results, AI answers, and Slackbot responses.

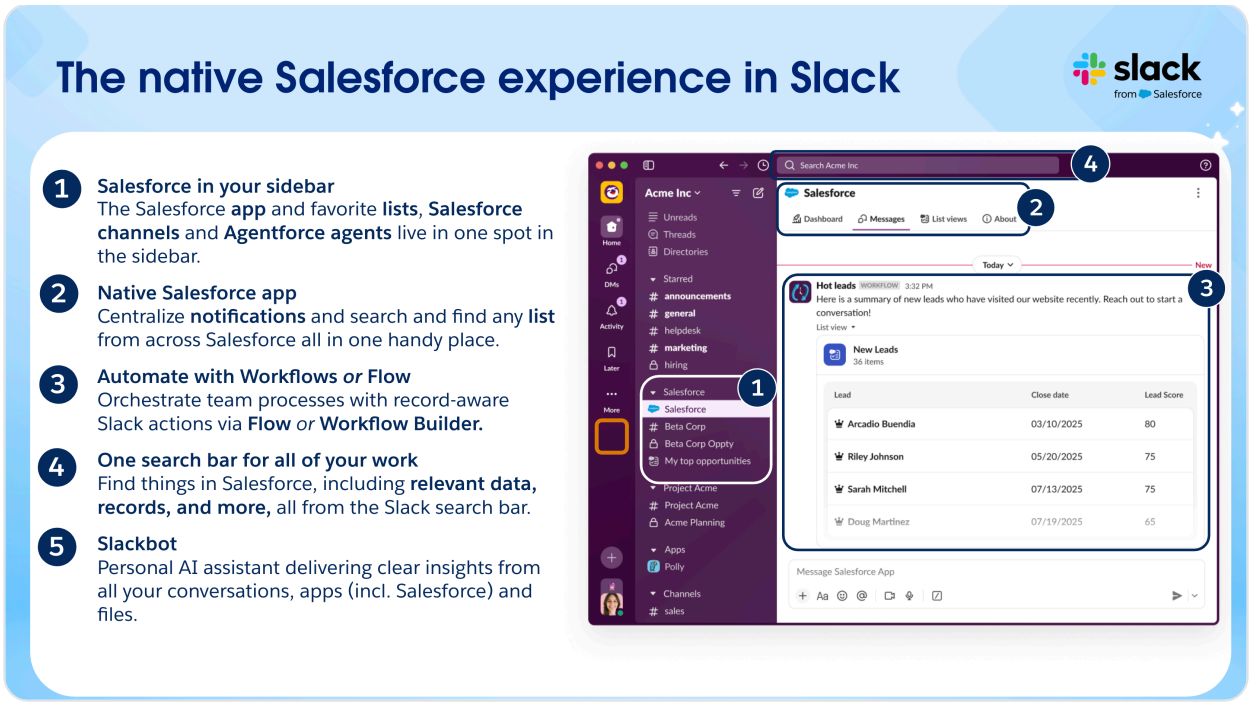
💡 You can also configure custom API connectors for in-house systems and on-premise software. Documentation here.

Salesforce and Slack

Step 7: Salesforce and Slack

The Seamless Salesforce Experience in Slack

Slack is the system of engagement in the Salesforce Agentic Enterprise Architecture. The Salesforce-Slack integration includes the following features.



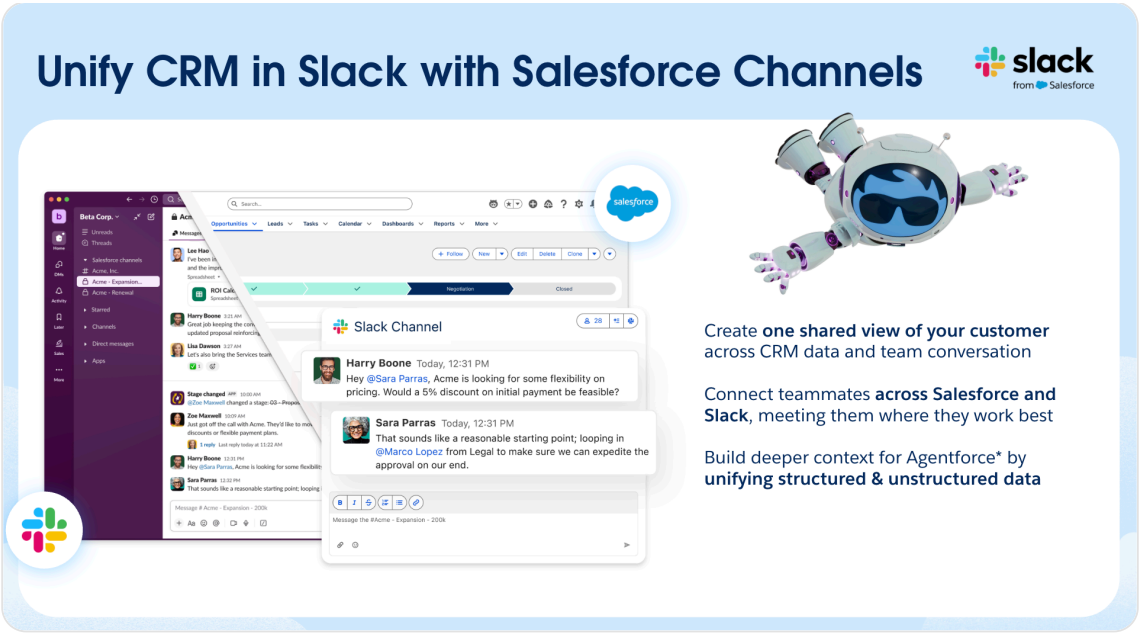
Additionally, the integrated experience offers:

- Seamless Authentication: Single sign-on across both platforms
- Salesforce List Views: Access and interact with Salesforce list views directly in Slack
- Unfurls & Work Objects: Paste a Salesforce link in Slack and it automatically expands into a rich, interactive preview with a detail flexpane
- Workflow Builder + Salesforce Steps: Build automations using clicks (not code) that include Salesforce actions

[Configure Salesforce in Slack]

Salesforce Channels

The cornerstone of unification, Salesforce Channels are a new type of Slack channel that links CRM records (Accounts, Opportunities, Cases, and custom objects) directly with real-time Slack conversations. Customers using Salesforce channels can see up to 76% stronger cross-functional alignment, 75% better deal visibility, and 30% less context switching.



Slack maximizes the power of Salesforce by bringing CRM data directly into the flow of work. Salesforce Channels in Slack are:

- Bi-directional: Fully accessible in both Salesforce and Slack, so teams work wherever they're most productive.
- Real-time merging of structured + unstructured data: CRM fields, deal stages, and customer records sit alongside live team discussions, files, and decisions.
- The backbone for Agentforce: By bridging both data types, agents get deeper context for more accurate, meaningful interactions,
- One view of the customer: Every teammate, human or agent sees the same complete picture.

Follow our implementation guide to connect your Salesforce instance with Slack: Salesforce Channels Implementation Guide

Agentforce in Slack

Core Salesforce Agentforce applications surface directly inside Slack, turning static records into live, conversational experiences. When an agent joins a Slack channel, it absorbs the full context, conversation history, project dynamics, participants, and shared files. Through Agentforce's Atlas Reasoning Engine and Salesforce data, agents connect CRM intelligence with live conversation to deliver contextually aware recommendations, not generic responses.

Check out these agent demos!

Change Management

Step 8: Change Management

Drive awareness, excitement, and smooth adoption across your organization with proper change management. Adoption takes time, iteration, and ongoing support, not a one-time training. The organizations that get it right invest early in champions, clear norms, and leadership modeling.

Create a Communication Plan

A comms plan keeps everyone aligned before, during, and after launch. It sets expectations, reduces anxiety, and drives early momentum. Without it, people fill the silence with confusion. Answer three key questions:

1. Why have you chosen to use Slack? Reference your vision statement from pt1 of this guide
2. What is the benefit of employees using Slack?
3. How can employees get started?

Recommended Communication Plan

1. Assign Your Executive Sponsor

- Delivers initial communications to promote the change across the organization

2. Slack Announcement

- Sent out by your executive sponsor
- Covers why you are moving to Slack
- Includes where to go for questions/feedback:
  - We recommend setting up a help workflow and a feedback workflow that employees can leverage (find information on how to quickly set up a new workflow using available templates here)
  - After the workflows are created, add them to the relevant channel (we recommend creating a `#help-slack` channel for this purpose)

3. Team Welcome

- Sent out by people managers and department leads
- Reiterate why you are moving to Slack
- Share how the department/team will use Slack

Share Your Slack Announcement in 4 Steps

1. **Draft announcement**: cover the why, what, and how
2. **Admin creates announcement channel**: you could rename the default `#general` channel to `#announcements-company`
3. **Executive sponsor posts announcement**: use `@channel` to notify everyone in `#announcements-company`. Send a supplementary email to all employees
4. **Engage employees**: encourage emoji reactions. Direct employees to `#help-slack` for questions and resources

Launch Email Templates

Download ready-to-use email templates for your launch communications:

- Wave 1: Initial communication from executive sponsor

- Wave 2: Team-level welcome from managers

Create an Enablement Plan

Enablement is the bridge between "we have Slack" and "we actually use it well." It gives people the confidence to change how they work, not just access to a new tool. A structured enablement plan ensures nobody is left figuring it out on their own, which is where adoption usually breaks down. It also creates consistency across teams so everyone is working the same way from the start.

Define your Enablement strategy for your launch

A complete enablement strategy targets two main user groups with two different types of training:

User groups:

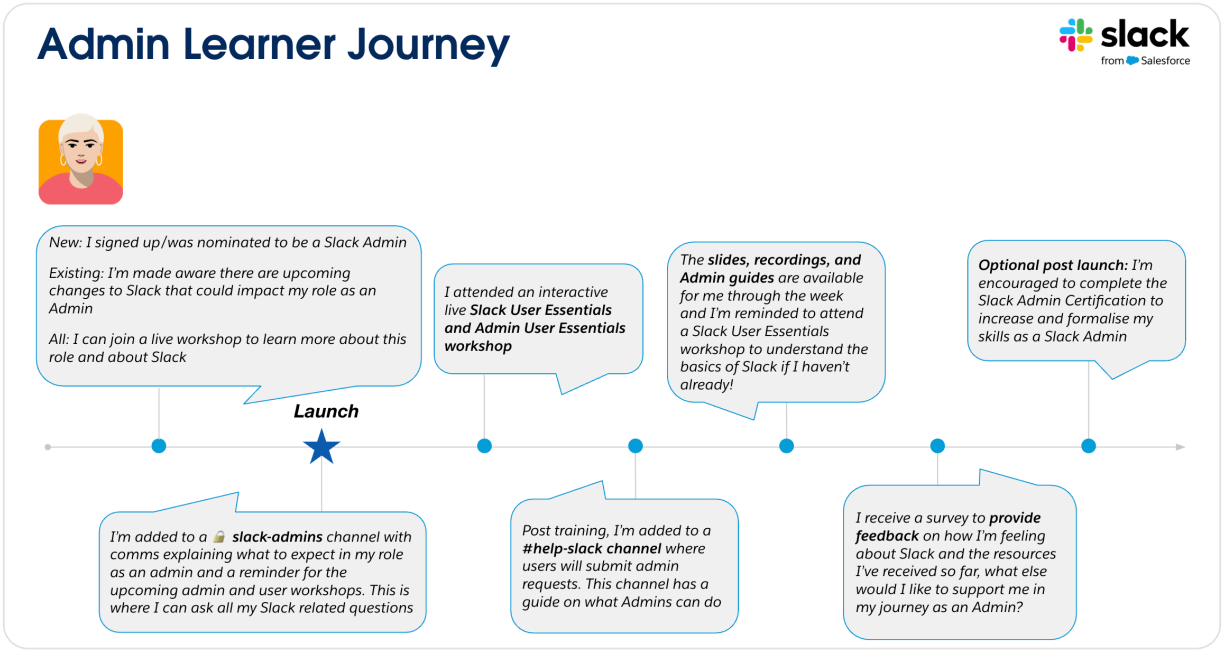
- Admins
- Regular members

Types of training:

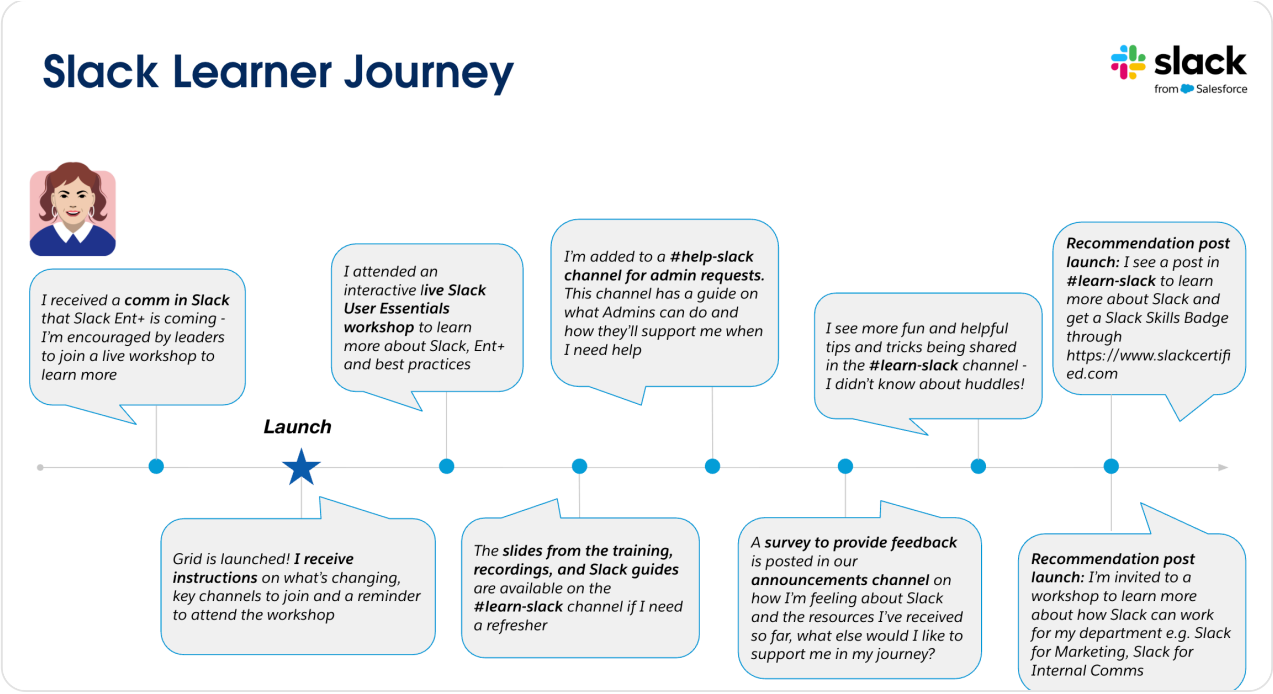
- Live: delivered in person or via webinar
- Self-serve: including articles, short video clips, recorded webinars, and tips & tricks delivered via Slack posts, email, internal training platforms

Consider your user groups' training needs based on their current level of familiarity with Slack and the journeys recommended below. Then, create a plan for the training content & appropriate method of delivery for each audience.

Admins and help desk training



End user training



Self Serve Learning Materials

Here are a few additional resources to help your users make the most of Slack from day one:

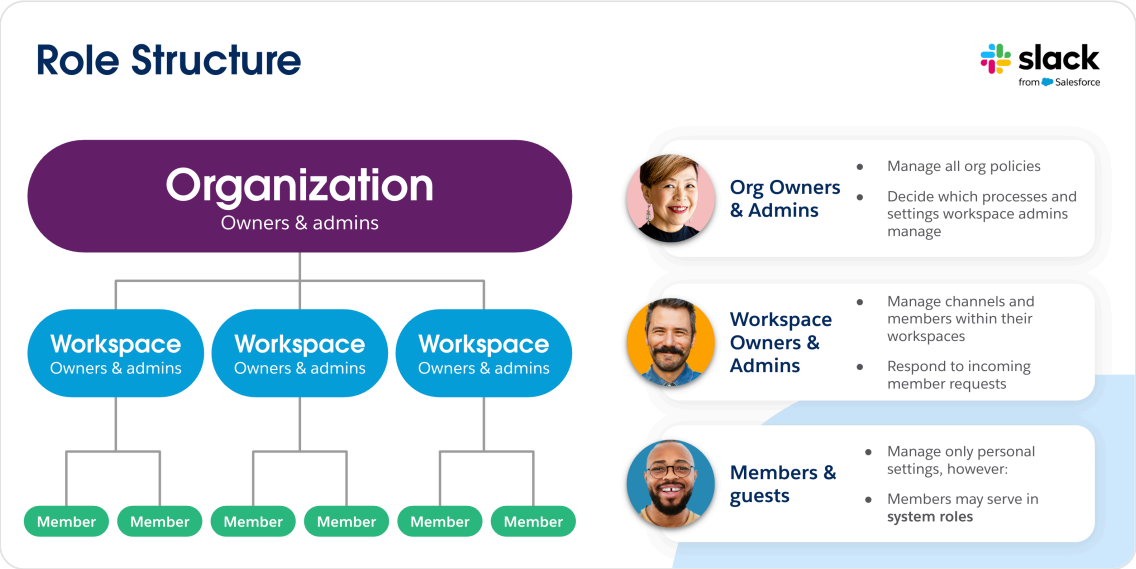
What is Slack?	A 2-minute 'What is Slack video' and Help Center Article with more info
Get started in Slack	• Your QuickStart Guide to Slack • Slack 101 articles
Conversations in Slack	• A 2-minute video - how to find and start Conversations in Slack • 90 second video - Slack Emoji Reactions for getting work done
Managing your notifications	• 90 second video - Your Essential Guide to Slack Notifications
Make the most of AI	• How to use AI in Slack to summarize conversations • How to use AI in Slack to recap what you missed • Use AI to automatically take huddle notes • Tips for searching with AI in Slack • How to use Enterprise search in Slack (Includes searching external sources)

Administration & Governance

Step 9: Administration & Governance

Governance is what keeps Slack secure, organized, and intuitive at scale. As your organization grows, so does the volume of channels, users, and data flowing through the platform. A clear governance framework sets the rules of the road, who can create channels, how data is retained, and how access is managed. It protects the organization and keeps the environment clean without slowing people down.

Assign admins and document admin responsibilities



Define request intake processes & approvals using channels

Admins are required to carry out key actions in Slack:

- Slack Connect Management
- General Channel Management
- Guest Access Management
- App Management
- New User Onboarding
- Policies & Settings reviews
- New Slack features

Channels can help organize admin workloads:

- Set up a public, org-wide Slack Help channels for users to ask questions and submit requests
- Set up a private, org-wide Admins-only triaging channel for admins to review and approve Slack admin requests

Workflows and **Canvases** help streamline requests:

- Workflows facilitate an organized Slack environment and create repeatable, and in some cases, automated, steps to streamline the management of Slack related activities.
- Leverage the Canvas within these channels to capture the process for users to submit requests from admins

Define your governance cadence

Proposed Governance Cadence

A Slack Operating Model reinforces and sustains itself by following a cadence of governance activities that are outlined below across a recommended frequency.

Activity	Cadence	Executive Sponsor	Product Owners/ Org Owners	Org & WS Admins	Champions
Slack Policies & Settings Review	Annual		X	X	X
Slack Business Reviews	Quarterly	X	X		
Slack Analytics Reviews	Quarterly		X	X	
User Support Model Review	Quarterly		X	X	X
Guest & Channel Clean Up	Ad Hoc/As Desired			X	X
Grid Health Review	Ad Hoc/As Desired		X	X	
Global Slack Champion Events	Ad Hoc/As Desired		X	X	X

Manage Common Administrative Tasks

Find additional information on how to manage common admin tasks in this section.

App Approval & Governance

- Manage Apps in an Enterprise Org

Slack Connect

- Managing Slack Connect

Channel Governance

- Use the channel management tool
- Multi-workspace channels
- Public to private channel conversion
- How to unarchive a channel
- How to restrict posting permissions

Guest Management

- Understand Guest Roles in Slack

Slack Analytics & Reporting

Analytics Dashboard

- View your analytics dashboard
- Overview of all the metrics in your analytics dashboard
- Message activity

Automate routine administrative tasks with APIs

[Managing Slack with APIs]

Export Tool

Data export options for Enterprise Grid include (full details here):

- Export data (messages and links to files) from public channels in your workspace
- Export data from public channels, private channels and direct messages (DMs)
- Export a list of channels and their details
- Schedule recurring exports
- Export data from all conversations that a single user has been part

Ready to learn more? Check out our Admin essentials webinar



Step 10: Time to Launch!

Now that you've configured your environment, planned for change management, and readied your admin team, you're ready to launch! Execute your launch plan and measure what success looks like. Review everything that we have covered as part of your launch checklist:

Org Structure & User Access

- [ ] Workspace(s) set up
- [ ] SSO/SCIM set up

Policy & Settings

- [ ] Finalize Day 1 policies and settings
- [ ] Decide Day 1 admin support model (#slack-help)

Communications

- [ ] Draft welcome message for `#announcements` channel
- [ ] Draft welcome email with sign-on instructions
- [ ] Prepare additional channel messages (feedback-slack, help-slack)

Workflows

- [ ] Set up help-slack workflow
- [ ] Set up feedback-slack workflow

End User Learning

- [ ] Finalize content for end user learning plan

- [ ] Decide training dates and create calendar holds

Channel Setup

- [ ] Create required channels
- [ ] Assign IDP groups to default channels to help onboarding
- [ ] Establish naming conventions
- [ ] Configure posting and settings for required channels
- [ ] Add channel descriptions for main channels
- [ ] Post welcome message in announcements channel
- [ ] Create team-specific channels and assign managers

Enable Launch Features that you decide on

- [ ] Slack AI
- [ ] Enterprise Search
- [ ] Salesforce channels

Integrations

- [ ] Set up Day 1 apps/integrations (OneDrive / SharePoint, Outlook, Zoom, Google Calendar, Google Drive, etc)
- [ ] Launch app management process (submission, review, approval)

Provisioning & Launch

- [ ] Provision all users
- [ ] Execute Day 1 welcome message
- [ ] Send welcome email with sign-on instructions
- [ ] Complete admin training
- [ ] Complete end user training

First Week Activities

- [ ] Daily tips posted (one feature per day: threads, huddles, workflows, search, apps)
- [ ] Champion proactively moving email conversations into Slack channels
- [ ] Managers lead by example: post updates in channels instead of sending emails
- [ ] Run a fun engagement activity (emoji poll, team trivia, escape room)

Define & Track Success Metrics

- [ ] Define success metrics: daily active users, channels created, reduction in internal email, time-to-resolution
- [ ] Review Slack Analytics weekly (messages sent, active users, channels created, usage of different features - apps, workflows, huddles)
- [ ] Run a 30-day adoption survey via Slack workflow
- [ ] Identify low-adoption teams and provide targeted support

Slack Maturity & Adoption

Step 10: Maturity

Scale your Slack deployment from adoption to transformation with advanced feature use and strategic governance.

Introduce Advanced Features

These features, unless configured differently in your settings, are available to users by default on day 1. However, users typically need some additional nudges and a bit of enablement before they use them well. Roll out additional information about these features gradually so users aren't overwhelmed:

- Channel Templates: Pre-configured channels based on line of business and use case
- Slack Lists: Track project tasks, staffing requests, or client deliverables directly in Slack
- Canvases: Collaborative docs for meeting notes, project briefs, and runbooks with embedded workflows and data
- Huddles: Quick audio/video calls with calendar integration and meeting artifacts
- Workflows: Automate process with no-code
- Salesforce Integration & Salesforce Record Channels
- Slackbot: Build Slackbot Skills
- Agentforce in Slack: Deploy purpose-built agents for your team's key use cases
  - **Slack Agent Templates**: Pre-filled topics and actions for Customer Insights, Onboarding, Employee Help
  - **Custom Agents**: Build with Agent Builder using Slack actions (create canvas, create channel, send DM)

Ongoing Governance

- Conduct quarterly channel audits: archive inactive channels, ensure naming conventions are followed
- Review and update integrations as your tool stack evolves
- Keep security and compliance settings current with your firm's policies

Monitor & Celebrate

- Track progress against your success metrics
- Highlight teams using Slack well: showcase real examples of faster decisions or collaboration wins
- Have the exec sponsor post monthly updates in Slack (not email) to signal commitment
- Celebrate milestones (e.g., "Our XX team has decreased time to resolution by X% thanks to swarming in Slack!")

Your Next Steps

1. Check out the Admin Launch Guide: slack.com/resources/launching-slack

2. Watch the Admin 101 webinar: slack.com/events/admin-essentials-101
3. Boost your Slack skills by enrolling into the Slack Certified program: www.slackcertified.com
4. Keep learning using Slack Resources Library: slack.com/resources

Additional Resources:

- Slack Quick Start Guide
- Slack Adoption Success Hub
- Slack Marketplace & AgentExchange
- What's New in Slack