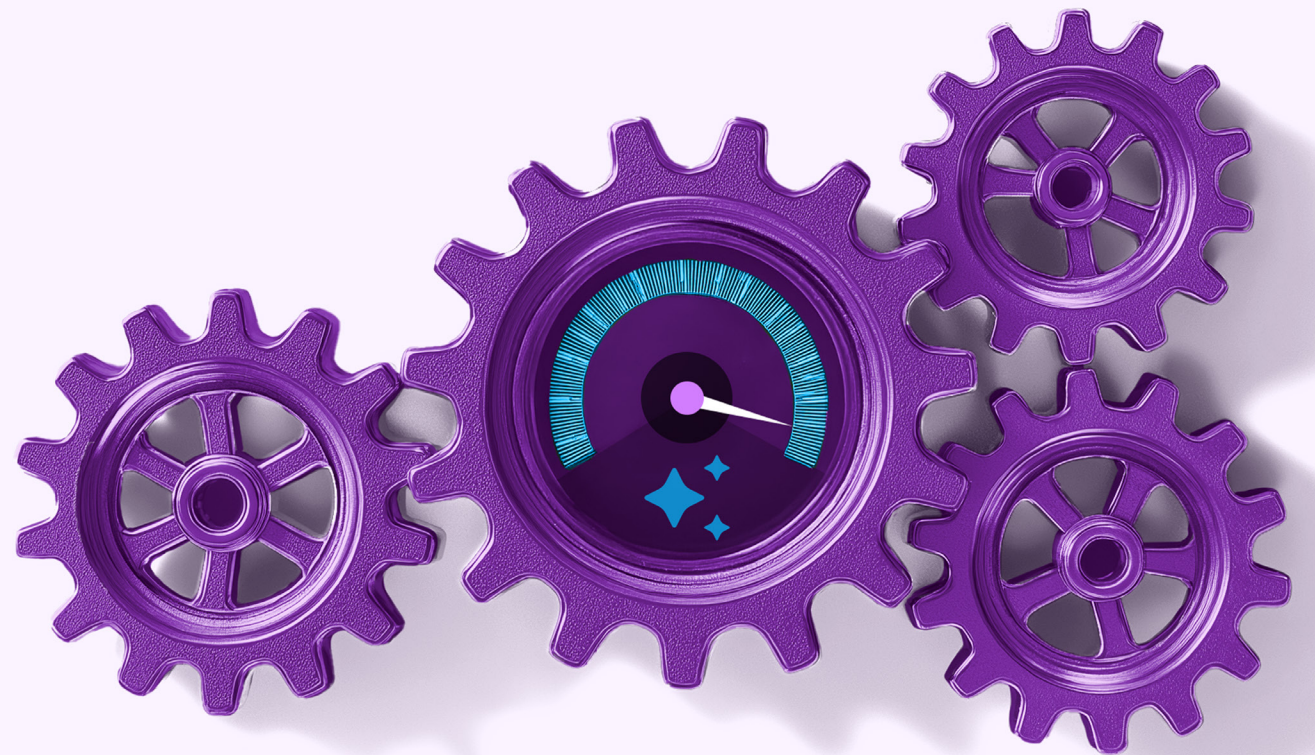




# 8 ways to use AI in Slack to improve how your small business operates

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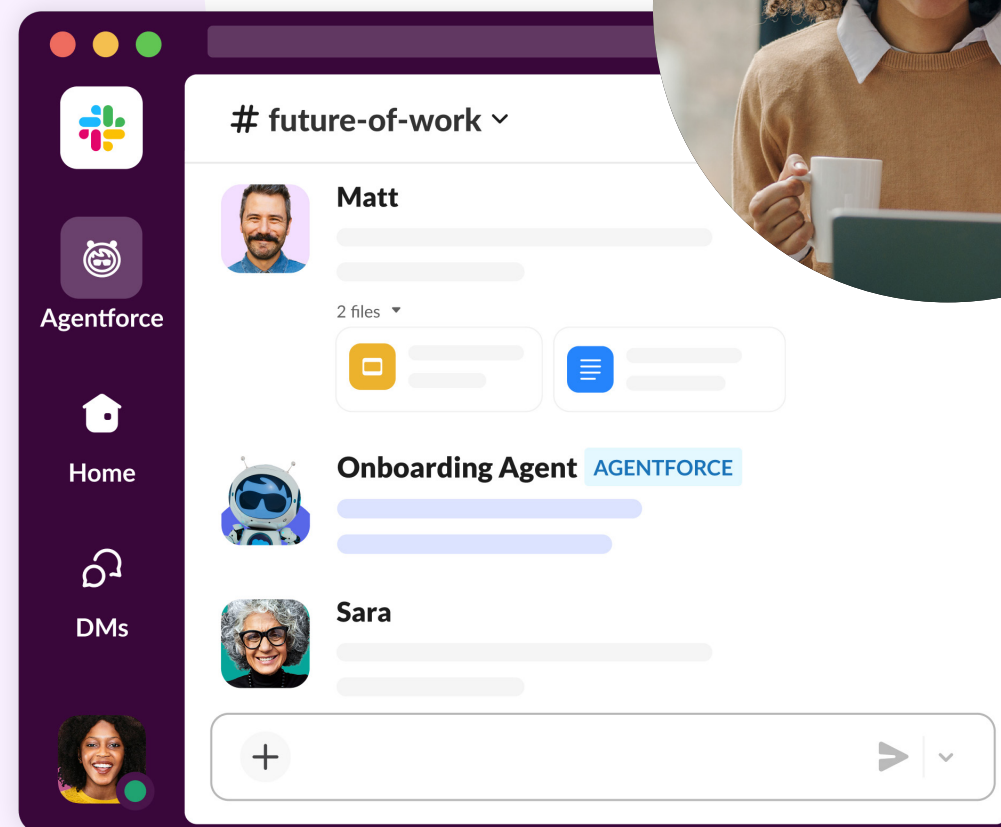
How to make daily work smoother, faster,  
and easier with AI, right where your team  
already collaborates



# Abstract

This is Slack's guide to boosting your small business's productivity using Artificial Intelligence. Discover how Slack's built-in AI tools can help your team achieve more by streamlining daily work. We'll show you practical ways to use AI to summarize lengthy discussions, quickly find answers buried in channels, or even get help drafting messages and recaps—all within Slack. AI in Slack is designed to cut down on routine tasks, saving your team valuable time to focus on growing your business and serving your customers.

This guide is your team's first step in adopting AI and redefining how your team gets work done.



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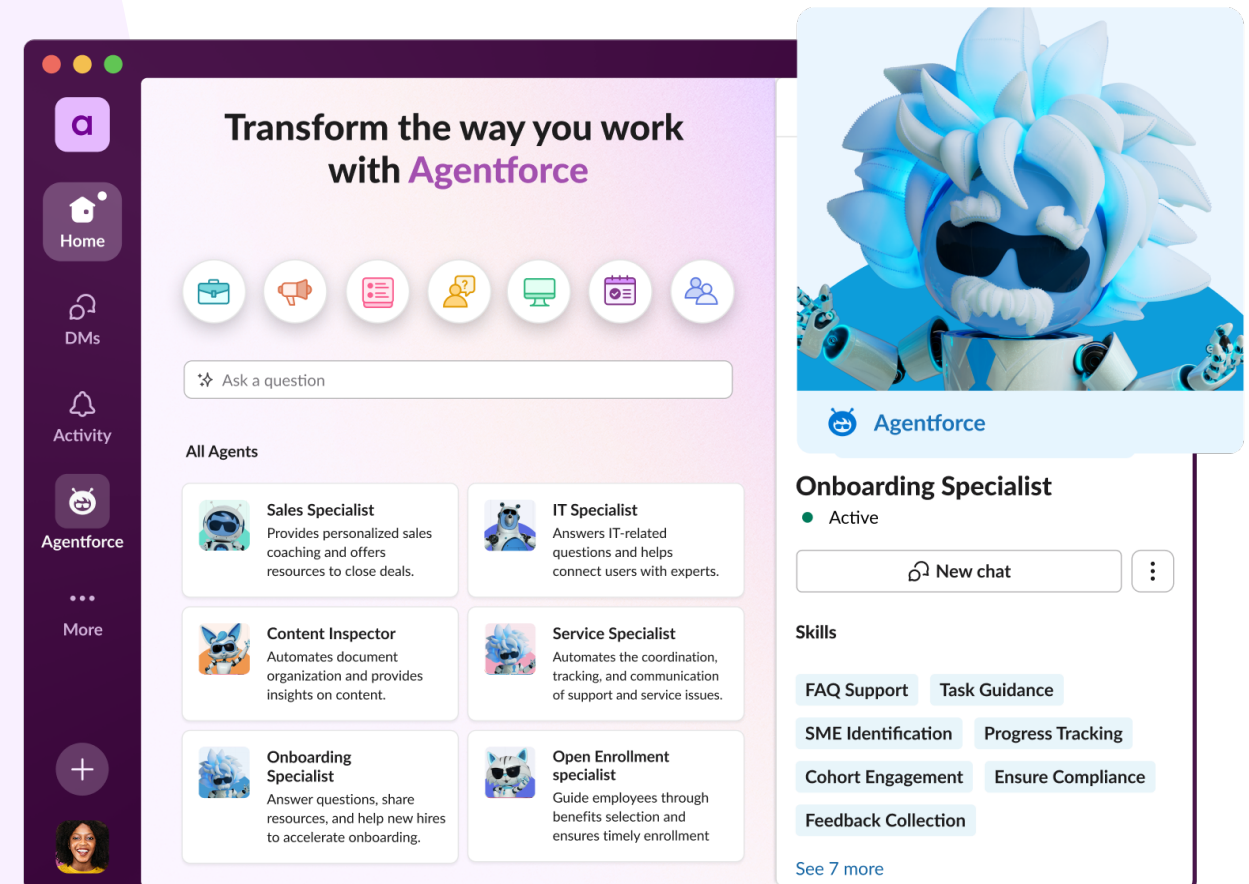
# Introduction

AI probably isn't the first thing on your to-do list. You're running a small business. You've got emails to answer, deals to close, maybe a customer waiting on hold. You don't have time for complicated tech rollouts.

Good news is: You don't need one.

[AI in Slack](#) works right where your team already talks, shares updates, and gets work done. It's built to save you time by cutting through clutter and taking the first pass at repetitive tasks. That means fewer follow-ups, fewer "where was that link again?" moments, and faster responses when it counts.

You don't need to overhaul anything. Just start where the slowdown is worst. This guide shows you 8 easy ways to bring AI into your daily workflow, starting small and scaling only when it helps. No extra tools, no new systems. Just Slack, working smarter.





## 01

# Start with your biggest bottlenecks

## Where does work get stuck?

You probably already know. The same questions get asked over and over. Key updates go unnoticed. Projects stall because someone missed a message or can't find the right file. And your team ends up rewriting the same emails or notes from scratch.

## These are the moments that slow everyone down.

AI in Slack helps you move faster by handling those common friction points. It can summarize long threads so no one has to scroll. It can pull up answers from months ago. It can draft updates, reminders, and replies that sound like you – and save real time.

## You don't need to change everything. Just start with one place where AI can take something off your team's plate.

Maybe it's a high-traffic [channel](#) like sales or support.

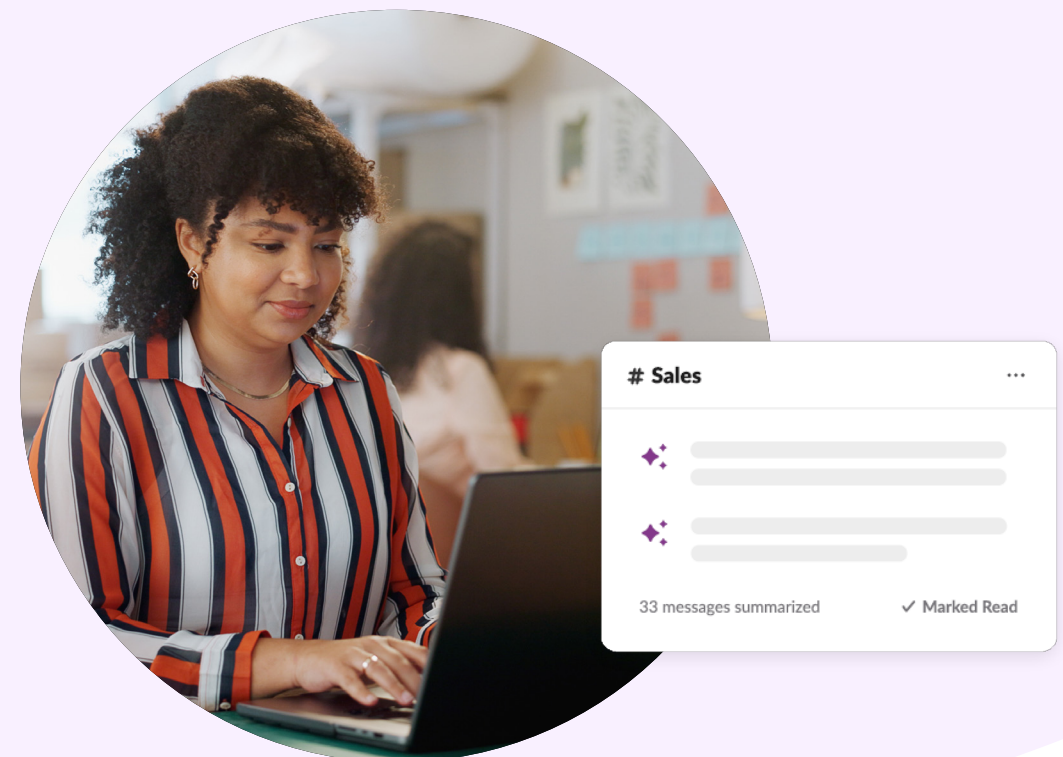
A recurring task like weekly check-ins. Or a workflow like onboarding that follows the same steps every time.

Start small. Keep it simple. Pick something useful but low-stakes, where it's easy to see the value. If it saves your team even 30 minutes a week, you've already won. That's time back for serving customers, closing deals, or just not working late.

## Here's how small teams are already using AI in Slack:

- 🗣️ Sales teams use it to prep follow-ups faster by summarizing deal notes
- 🔧 Ops leads rely on it to collect daily task updates and flag overdue work
- 👤 Support agents review AI-drafted replies and send them in seconds

Small changes add up. One fix today can save hours down the line.



## 02 Cut through message overload

Messages pile up fast. You step away for an hour – or a day – and come back to a wall of text. Somewhere in there is a decision, a deadline, maybe a fire to put out. But finding it? That's the problem.

AI in Slack can catch you up in seconds.

### Let AI in Slack do the scroll work.

AI in Slack can summarize long conversations, picking out the important stuff: what changed, what was decided, what's still open. Instead of reading 80 messages, you get a short summary like: "Team discussed Q3 pricing strategy. Decided to stick with existing tiers. Sarah to update the sales deck by Thursday."

Now you're up to speed and back in action. Things add up. One fix today can save hours down the line.

### Use it for handoffs and new joiners.

Let's say someone's back from PTO. Or a new teammate is jumping into a client channel. You don't need to rehash everything. Ask AI in Slack to summarize the thread. It gives them the context without wasting anyone's time.

Same goes for pulling in an expert to solve a tricky problem. AI brings them up to speed in one click.

### Recap meetings without writing them yourself.

If your team has a [huddle](#) in Slack, or you drop updates throughout the day, AI can pull together a clean, clear recap that's ready to share.

Use Slack canvases to keep these recaps organized. They're perfect for notes, to-dos, and running agendas. AI in Slack helps write them.

[Canvases](#) keep them findable.

### Small teams making a big difference



Wonolo, a staffing platform, used AI to speed up support replies. Instead of typing from scratch, agents got message drafts based on past convos. **They cut average handle time by 20%, saving more than five hours a week across just 11 agents.**



PaySauce, a small payroll company, used AI in Slack to help new team members ramp up faster. Instead of bugging a manager, they searched old threads and read AI-generated summaries to get answers themselves. Fewer delays. More confidence.

[Guide to AI for Small Business, Salesforce](#)

## 03 Find answers without digging

Your team knows where everything is... until they don't. One doc's in Google Drive. Another's in someone's inbox. The final version? Maybe it was posted in Slack. Or maybe it wasn't. That's where Slack's AI-powered search comes in.

### Just ask.

Instead of scrolling or guessing file names, type a real question:

- 📄 “Where’s the Q3 pricing sheet?”
- 👑 “What’s the latest with the Rivera client?”
- 👤 “Do we have onboarding steps for new hires?”

AI in Slack looks across messages, files, and connected tools to find what you need, even if it was posted three months ago in a private channel you now have access to.

### It works across your tools, not just Slack.

If your team uses Google Docs, Dropbox, Notion, Salesforce, Asana – whatever – you can connect them to Slack. Then Slack's search doesn't stop at Slack. It checks everywhere. Instead of asking “who uploaded that brief?” or “where was that slide?”, you just ask Slack.

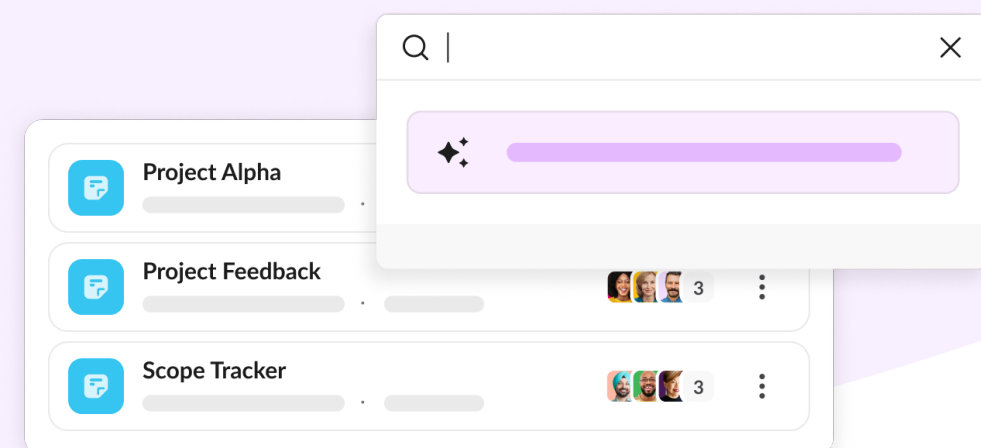
This is where small businesses save big time:

- 🕒 **Cross-tool chaos:** Instead of jumping between four tabs, your team stays in Slack and finds it all.
- 🔍 **New hires:** No more “can someone send me the link?” They search and go.
- 📌 **Customer prep:** Before a call, search the client name and get everything in one place: notes, files, convos, history.

### Search also works in canvases.

Slack canvases are living documents – perfect for things like onboarding plans, SOPs, and meeting notes – and they show up in search just like messages and files.

To get the most from AI in Slack, keep key conversations in public channels, name files clearly, add short summaries when sharing links or uploading docs, and connect your most-used tools. That way, your team isn't digging through threads or asking around. They just ask, and Slack finds it.



## 04



## Write and respond faster

Writing takes time. Even short messages. You want to sound clear, friendly, professional, especially when you're dealing with customers. But when your to-do list is a mile long, the blank message box can be a bottleneck.

Whether it's a support reply, a sales follow-up, or a project update, AI in Slack can generate a starting point based on the conversation thread, your past messages, or attached files. You get a polished draft in your voice. Edit a few words, hit send, move on.

### Here's how small teams are already using AI in Slack: Customer service



Support agents deal with long threads and scattered details. AI in Slack pulls it all together:

-  A customer sends a multi-thread question. AI in Slack suggests a complete, relevant reply by pulling from your knowledge base or past answers.
-  After a case is resolved, AI in Slack creates a short case summary that gets shared in your help channel or turned into a follow-up note.

Your team spends less time rewriting the same answer and more time helping people.

### Sales outreach

Follow-ups matter. So does speed.

-  Drop a note like: "Follow up with Acme Corp next week." AI in Slack turns it into a ready-to-send message or email, personalized with client details and context from past threads.
-  Preparing for a demo? AI in Slack can summarize what the prospect asked about and what you've already shared, so you're not repeating yourself or scrambling before the call.

### Internal updates

Need to send a weekly report? Kick off a campaign? Share project news? Let AI in Slack scan the thread or channel and suggest a quick summary. You review, tweak, and post. Now everyone's in the loop, without chasing or typing the same thing twice.

### Knowledge sharing

When someone solves a tricky issue, don't lose that knowledge. Ask AI in Slack to turn a solved thread into a help doc. It can create a canvas with steps, links, and takeaways, ready for the next teammate who hits the same wall. No extra writing. Just better memory.

**Bottom line:** You're still the expert. But now AI in Slack handles the busywork part of writing so you can move faster without sacrificing quality.



## 05

## Take everyday tasks off your team's plate

You and your team are juggling meetings, follow-ups, check-ins. It adds up fast. AI in Slack helps by handling the routine stuff so your team can focus on the work that actually moves the needle.

### Skip the status meetings

Replace daily standups with an automated check-in. Each morning, Slack asks your team a few quick questions:

- ❓ What did you work on yesterday?
- ☰ What's next?
- ✅ Any blockers?

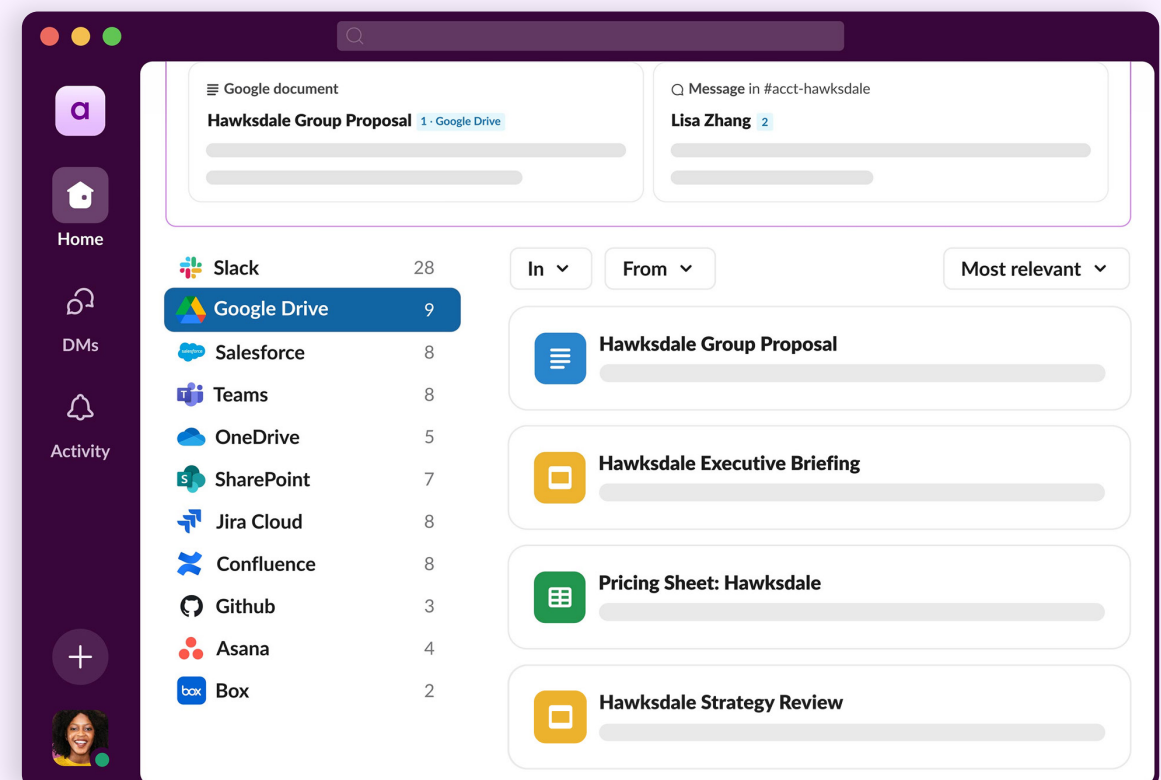
AI in Slack reads the replies and posts a clean summary in your team channel. Everyone's in the loop. No meeting needed.

**Tools used:** [Slack Workflow Builder](#) + AI in Slack summarization

### Streamline campaign planning

Marketing teams use AI in Slack to organize launches without chasing people for input. Fill out a short form with campaign details, and the workflow does the rest: It pings finance to approve the budget, legal to review messaging, and AI in Slack shares a quick status update so leadership knows what's happening.

**Tools used:** Custom Slack workflows + integration with [Google Drive](#) and [Calendars](#)



## 05

## Take everyday tasks off your team's plate

### Make onboarding smoother

New hires have a lot to absorb. AI in Slack can help guide them.

On day one, Slack posts a checklist in the welcome channel that includes links to docs, intros to teammates, and setup steps. As the new hire asks questions, AI in Slack flags common ones so you can improve the checklist over time.

**Tools used:** Slack canvas + Workflow Builder + HR system integrations (e.g., [BambooHR](#))

### Stay ahead on leads

When a prospect books a demo or downloads a proposal, you want to follow up fast. AI in Slack posts a real-time alert in the right sales channel, includes relevant background, and suggests a first message to send. That means your team can respond while the lead is still warm.

**Tools used:** Slack + [Salesforce integration](#) + [Agentforce](#)

### Keep tasks from slipping

Missed deadlines hurt momentum. AI in Slack keeps an eye on tasks. If something's due and hasn't been updated, Slack sends a reminder. It also includes the last conversation about that task so the person doesn't need to hunt for context.

**Tools used:** Slack [lists](#) + AI in Slack summarization + calendar sync

### Small shifts, big payoff

These are quick wins. Start with one. Set up an automated standup or trigger nudges for overdue tasks. Your team will spend less time chasing work and more time doing it.



## 06

## Build a smarter, shared knowledge base

Most small businesses don't have a formal knowledge base, and that's okay. If your team is already solving problems, answering questions, or documenting processes in Slack, you're halfway there. AI helps turn that daily chatter into a searchable resource your whole team can learn from. Here's how to make it work:

### Start by organizing in public

Encourage your team to use public or shared channels instead of DMs. That way, AI in Slack can surface answers when someone searches later.

### Create channels by topic or role:

- **#faq-it**
- **#how-we-sell**
- **#customer-support-notes**

The more knowledge lives in shared spaces, the easier it is to reuse.

### Use Slack canvases for living documents

Slack canvases are great for keeping evolving information in one place, like onboarding plans, how-to guides, or project FAQs. When someone asks a recurring question, drop the answer into a canvas. Add links, tag teammates, and keep everything editable.

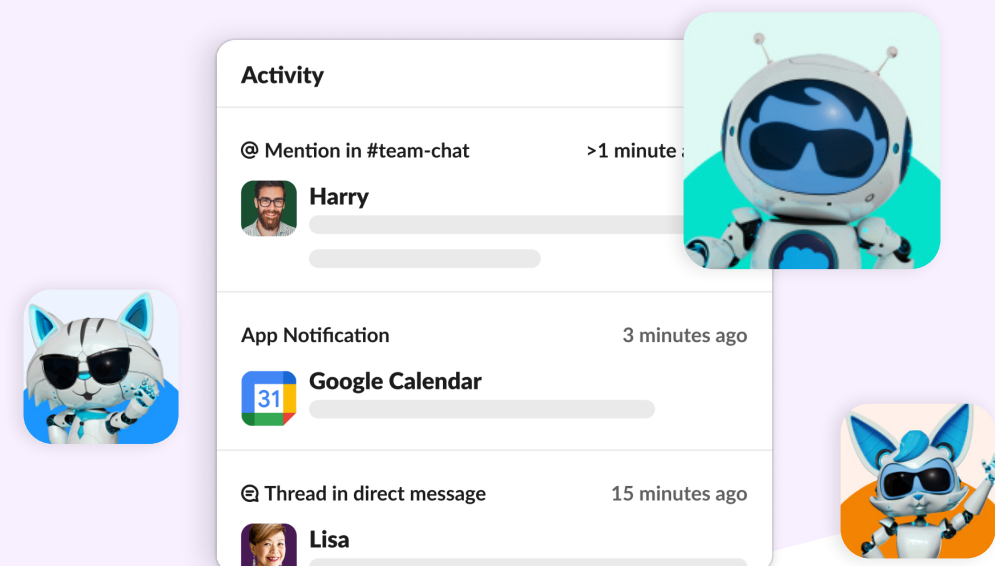
### Capture expertise as it happens

Say a teammate solves a tricky customer issue. Instead of losing that insight in the thread, ask AI in Slack to create a short summary or draft a how-we-handled-it note. Those quick captures turn into future training docs or help articles, no extra lift needed.

### Connect your tools to Slack.

You're already using platforms like Salesforce, [Zendesk](#), or [Notion](#) to store important info. When you connect them to Slack, AI in Slack can pull in relevant answers right when your team needs them, no switching tabs or digging around. For example, if a support agent asks, "What's our refund policy for New York customers?" AI in Slack can surface the exact doc from your knowledge base.

**Tip:** Set a culture of "working in public." If someone answers a question in a DM, ask them to repost it in a shared channel. That's not just good for visibility, it's how AI in Slack learns what matters and helps others find it later.



## 07

## Work better together

Small teams move fast. But as projects get more complex, and more tools get added to the mix, staying on the same page gets harder. AI in Slack helps teams stay connected without needing more meetings, status checks, or update emails.

### Work from your tools, right inside Slack

Sales, marketing, and support all rely on platforms like Salesforce – but they work together in Slack. Instead of bouncing between systems, create a dedicated channel for each sales opportunity. Pull in the live CRM record, and let everyone collaborate in one place. AI in Slack keeps the team up to speed by summarizing progress and suggesting next steps.

No more “any updates on Acme?” messages. Everything’s already there.

### Swarm problems in real time

Say a customer flags an issue. A support agent shares it in Slack. Engineering, logistics, and account management jump in. AI in Slack summarizes what’s known, flags blockers, and tracks the resolution.

Everyone sees the same picture. No one’s left guessing.

### Prep faster with fewer pings

Heading into a customer meeting? Ask AI in Slack for a briefing doc. It pulls from recent conversations, CRM notes, and shared files to give you a clear summary.

Less scrambling. More confidence.

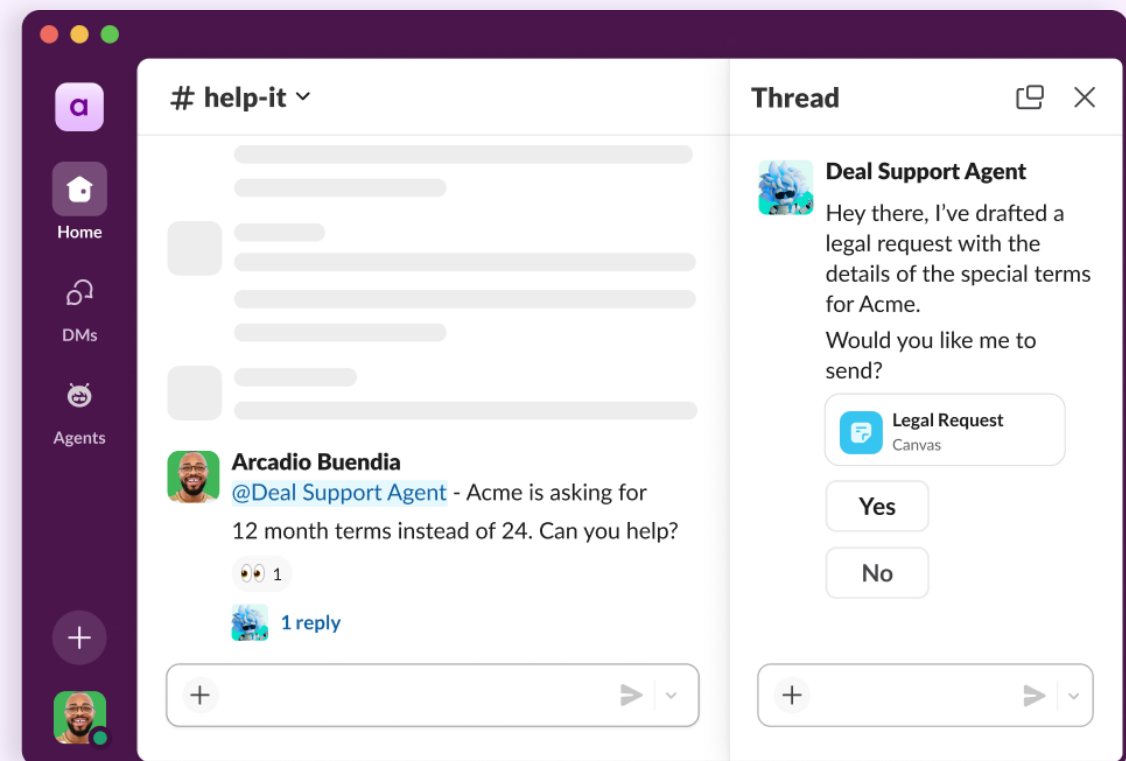
### Let AI in Slack fill in the gaps

When a thread gets long, AI in Slack can post a short update. If a customer issue goes quiet, it can suggest a follow-up. If there’s confusion, it can clarify the key decisions already made.

Think of it as a teammate who keeps track of the details and makes sure nothing falls through.

### Why this matters for small businesses

You don’t need a big operations team or full-time admin. AI in Slack helps your existing team work like a bigger one. Everyone stays aligned without the extra lift.



## 08

# Keep safety, clarity, and team comfort in mind

## Keep your data clean and secure

AI in Slack works best when it has access to accurate, up-to-date info (and only the info it's supposed to see).

- 🔒 Review who has access to what
- 🗑️ Clean up outdated files or duplicate docs
- 🔒 Use permission settings to keep sensitive info protected

Good data makes good AI. Don't skip this step.

## Offer a simple walkthrough

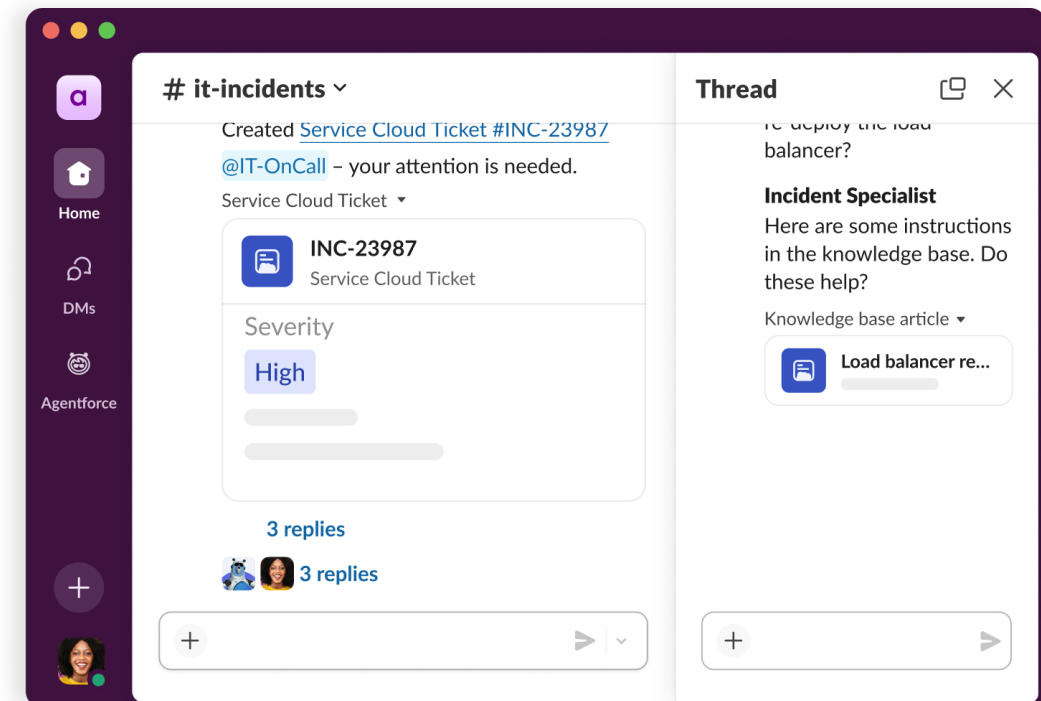
You don't need a formal training program. Just show your team how it works.

- 📖 How to request a summary
- 🔔 What an AI-generated reply looks like
- ✎ How to edit or ignore a draft
- 🗣️ How to give feedback if something feels off

Confidence starts with a quick demo. No jargon needed.

## Don't overpromise

AI in Slack won't replace your team. It supports them. Frame it as a time-saver. It helps them focus on the work only they can do, like talking to customers, closing deals, solving problems. That's what builds trust, internally and externally.





## Conclusion: Your next step

You don't have to change everything at once. Just pick one spot where things slow down – too many messages, lost files, repeat tasks – and let AI in Slack take the first pass.

No extra apps. No steep learning curve. It's already built into the way your team works.

Start small:

- 🔍 Try a summary in a busy channel
- 💡 Use AI in Slack to write a reply
- 🕒 Automate a check-in or reminder

The more you use it, the more time you get back. And every saved minute is a chance to focus on customers, growth, and the work that matters most.

Your team's next step? Just start. 🌈





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