Digital transformation: How IT leaders can improve productivity in every department
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Introduction

In today’s turbulent economic conditions, companies everywhere are looking for ways to steer their ships into calmer waters. The practical solution involves charting a course for improving business value in every department, but how can this be achieved? More than ever, companies are turning to IT admins to be the captains of this mission.

As the market research firm Forrester attests, IT leaders are able to create technology roadmaps that help increase productivity and efficiency across the entire organization. Though such a change may initially seem costly, the best technology investments allow you to maximize the value of all of your existing tools while unlocking productivity gains across the entire organization. For IT leaders, it’s all about finding the right technology for their team’s unique needs.
The changing role of IT

IT departments are evolving at a rapid speed. Gone are the days of troubleshooting tools and hardware—now IT is a full strategic partner to the business. Tasked with delivering business transformation, IT must look to increase productivity and drive innovation across every department. But three challenges stand in the way:

1. **Complexity.** Tech stacks are increasing in complexity as more functionality and features are added to meet operational demands. This means that one small change can impact the whole system. Teamwork and cross-functional understanding, efficient communication and data integration are needed to overcome this challenge in a work-from-anywhere environment.

2. **Cost-efficiency.** Future economic conditions remain uncertain, and stakeholders are looking for ways to increase cost efficiency and reduce budgets. Leaders are turning to IT for help aligning the technology that every team uses to meet department and companywide goals.

3. **Capacity.** As budgets tighten and resources stretch, every department in a company must do more with less. IT admins are asked to improve their productivity (and the productivity of every department) while also taking on more work. Automation can help reduce repetitive tasks and burnout, and in turn allow IT employees to focus on more important and impactful tasks.

87% of IT and business leaders report that they’re increasingly working together on the same initiatives around business transformation

In this e-book, we’ll explain how to address these three challenge areas with Slack and Salesforce. It all starts with a powerful platform to help integrate data and applications, unlock productivity, and collaborate with departments across your business.
Why you need a productivity platform

A productivity platform is essential for connecting team members, stakeholders, partners and customers. It gives your team the power to work from wherever they are by:

- **Sharing knowledge.** Access data and insights housed across multiple different applications and teams from a single Slack window as your source of truth. With dedicated project channels and customizable workflows, collaboration is much more efficient and much less complex.

- **Integrating key applications.** Slack is open and extensible, with over 2,600 apps in the Slack App Directory that can be integrated in one click and a robust library of APIs to build custom connections. This lets you tailor each workspace to meet the unique needs of your team. Increase cost efficiency by helping employees get more done in less time with apps and tools in one accessible space.

- **Automating tasks.** Help your teammates get back to doing the kind of work only a human can do. Increase employee capacity by automating tasks in Slack so your people can focus on what matters most.

When you choose Slack, you get more value from the tools, apps and processes you already use. Integrating your toolbox into Slack means less context switching and greater productivity. Here are some ideas to get you started:

- **Salesforce Sales Cloud:** Manage opportunities, accounts, contacts and leads right from within Slack, and easily share important deal updates with your whole team with our native, bi-directional integration.

- **Salesforce Service Cloud:** Swarm on cases and share incident data with cross-functional partners to resolve customer issues faster with our native, bi-directional integration.

- **Google Analytics Insights:** Get automated reports and alerts on ads across Google, Facebook and more, delivered directly to the Slack channel you choose.

- **DocuSign:** Send, sign and collaborate on contracts right in channels with DocuSign’s app for Slack.

91% of Slack customers achieve ROI within 10 months*

*Source: Salesforce: Slack Customer Success Metrics, 2022
But it’s not just IT that benefits from Slack. It improves flexibility, communication and productivity for your entire company, too.

28% increase in sales productivity¹
16% faster time to market for engineers²

Build a platform that works for you

IT facilitates collaboration within every department in today’s digitally dominated world. And each department’s needs are unique—IT leaders know better than anyone the sort of tools that will best serve their goals. Let’s take a closer look at how you can create a workspace that enables your company’s goals.

¹ Salesforce Customer Success Metrics Global Report, July 2022
² Forrester, “The Total Economic Impact of Slack for Technical Teams,” 2020
Customize your technology toolkit

IT is constantly getting requests to enable new processes and improve outcomes. With Slack and Salesforce, you can build a technology toolkit with no-code to pro-code offerings that empower you to fulfill any request no matter the complexity or timeline.
No-code offerings

Salesforce and Slack customers have access to essential off-the-shelf integrations that include Sales Cloud, Service Cloud and more, and they’re ready to use the moment you open Slack. For example, let’s say you need to enable team selling at scale: with Sales Cloud for Slack, the app does the heavy lifting of automatically creating account team channels that reflect account ownership in Salesforce, enabling deal support process requests and approvals, and more—all out of the box, no coding required.

Low-code offerings

When your workflow goes beyond what out-of-the-box Salesforce apps for Slack provide, Salesforce also has a set of low-code offerings to help you digitize your workflows. With Salesforce Flow’s suite of tools, including Flow Builder, Flow Orchestration and Flow Integration, teams can optimize processes quickly with end-to-end automation that delivers in three key ways.

1. **Orchestrate mission-critical processes** by bringing people and systems together to fast-track tasks, approvals and backend processes.
2. **Automate** those actions across any system—Salesforce, cloud or even legacy—simplifying challenges with integration.
3. **Embed workflows everywhere** to allow employees, customers and partners to interact in workflows from anywhere.

![Image of a Slack conversation and workflow](image-url)
Pro-code offerings

Let’s say you have a more complex request, such as customizing the cross-functional approval process for your sales team. In this case, you can harness Apex SDK for Slack, which will be available for general audiences later in 2023.

With this new feature, your Salesforce developers can build apps for Slack by bringing context to any custom Slack UI and infusing their processes and conversations in Slack with Salesforce data and metadata. They can also use Apex to fetch Salesforce records, create reusable views, and route events from Salesforce to Slack, and vice versa, all without middleware. Synchronizing information across multiple systems in Salesforce while still surfacing it right where your teams are working in one platform means processes are quicker and more efficient.

There are many aspects of sales, from collaborating around a deal to processing orders, and each one demands a different level of tooling. With Slack and Salesforce working together, your tools can be customized to evolve with you as every line of your business grows.

Slack and Salesforce: better together

Slack enhances your Salesforce investment with pre-built Customer 360 products. These out-of-the-box integrations, such as Sales Cloud, Service Cloud, Trailhead and more, unlock valuable information about your prospects and customers for everyone in your organization, whether they have a CRM license or not. And it all happens in the same place where teams can act on those insights—in Slack. Building stronger customer relationships is worlds easier when Salesforce and Slack are working together.

28% faster response time to customers and prospects for teams using Slack and Salesforce*

*Source: Salesforce: Slack Customer Success Metrics, 2022
How IBM uses Salesforce and Slack to drive innovation and excellence

As presented at Dreamforce 2022 by the IBM team, the task of simplifying workflows and communication for its 250,000 global employees posed a significant challenge. After weighing their options, they turned to Slack.

By connecting all employees in Slack, IBM leveraged designated channels to keep projects on track and automated complicated workflows to simplify operations. IT now handles ServiceNow tickets directly in Slack, leading to faster resolution times. Integrations of Jira and GitHub accelerated engineering productivity, and Slack Connect helps IBM’s sales teams close deals with external partners faster. All the tools they need to do their jobs are now available in one digital platform.

These out-of-the-box integrations provide a single source of truth in Slack—delivering customer insights for faster response times. Let’s look in more detail at three ways companies can use this to their advantage.

*Source: IBM Team, September 2022*
Sales alerts

The process of assembling a deal pursuit team can be clunky and disorganized. Often, there are too many systems and processes in requesting deal support, leading to stalled deal momentum. Alerts get lost in emails, and there’s no centralized process for follow-ups. By creating a way for sales teams to request a deal pursuit team follow-up in Slack, notifications get sent to the right people in a designated channel. And once deal pursuit team members are assigned, Salesforce is automatically updated, allowing for faster deal follow-ups.

Customer service swarming

The rise of distributed customer service teams makes it challenging for reps to collaborate across the business, access internal experts and train new employees. Service cases are also more complex than ever, with customer expectations at an all-time high. Disconnected tools, teams and workflows contribute to higher ticket backlogs and a reduced CSAT score. Salesforce provides real-time data, while Slack delivers those insights in one space, enabling teams to swarm and collaborate faster.

Employee expert support

Onboarding in the digital age can be overwhelming. New employees must get up to speed on a variety of processes and tools, often remotely. When a question pops up, who should they ask, and via what tool?

With Slack, you can set up workflows to highlight popular and recommended channels so new hires can easily find the people and answers they need. In turn, new guided workflow components used in Flow Builder and Salesforce Experience Cloud can be pulled into those channels, so process updates can be outlined and detailed for everyone in the organization.
Do more with Flow for Slack

Slack is much more than a communication tool. With Salesforce, it simplifies processes and integrates systems so you can work smarter, not harder. Additionally, the same Flow Orchestration you use to customize multi-step processes within Salesforce can now extend to your productivity platform.

When it’s time to bring your Salesforce data into Slack where your team is collaborating, you can use pre-built Slack actions to make sure conversations are always customer-centric. That way, every decision your team makes is made together and driven by data, not assumptions. Flow for Slack helps you deliver business value quickly by:

- Automating with pre-built Slack actions: Create collaboration-based automation with full support from Salesforce data and actions.
- Collecting input with guided workflows: Update data using guided, multi-step prompts without needing to log into Salesforce.
- Connecting Slack to complex process orchestration: Add an engagement layer to any workflow, including complex process orchestration.

Using Salesforce and Slack workflows helped Intuit boost customer service ratings by 12%. Intuit has a decade-long history with Salesforce, using Sales Cloud, Service Cloud and Marketing Cloud to support its 14,000 employees in creating customer-centric experiences. When Intuit added Slack to the mix, team members could solve customer problems more efficiently with automation and AI assistance. Quincy, a custom AI bot built by the company in 2019, is integrated directly into Slack. Quincy directs reps and customers to the most relevant information within seconds and keeps a record of these interactions to improve its performance over time. All together, Quincy helps the company save 9,000 hours annually for its reps.
Workflows and bots can help companies increase employee productivity and drive cost efficiency without compromising the customer experience.

**Deliver business value now with Slack and Salesforce**

To deliver business value in today’s rough economic waters, companies are turning to IT teams to steer their ships. This makes sense, given that IT leaders hold the unique position of owning a complete overview of a company’s operations. With the right people and tools, they can increase productivity and cost efficiency across every department. It’s a big responsibility, but with a customizable platform, IT leaders can steer the company ship into a safe harbor.

“We introduced Slack five years ago as a simple way to communicate through direct messaging. Today, it’s the number-one platform we use for collaboration and information sharing, allowing us to connect seamlessly across regions and departments. Overall, we’ve created 1,200 Slack workflows across the company.”

*Gabrielle Dracopoulos*
Head of Customer Success and Experience, Intuit
Ready to build your productivity platform? Get started.