



# Marketing Teams and Slack

A Handbook



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*A primer on shipping campaigns faster, optimizing them with real-time data, and working cross-functionally with Slack*

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**T**he average company loses more than 20% of its productive power to organizational drag.<sup>1</sup> That includes all the time teams spend digging for information, like last year's conference attendee list, or coordinating internally on the status of designs, copy, budget approvals, and other factors that affect a campaign or program's success.



This handbook will show you and your marketing team how you can use Slack to create a central hub to brainstorm campaign ideas, manage creative, and iterate on results faster. Work in channels, integrate apps and services you already use, and deploy various Slack features to surface information in a jiff so people can devote their time and energy to what matters most: bringing in customers and making them happy.

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<sup>1</sup> Michael Mankins and Eric Garton, Bain & Company, "Time, Talent, Energy," March 7, 2017. <http://www.bain.com/publications/business-insights/time-talent-energy.aspx>



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## Use this handbook to learn how to:

- 01** Get access to information, decisions, and internal experts company-wide
  - 02** Track real-time performance data to optimize campaigns
  - 03** Monitor customer feedback and sentiment and respond quickly
  - 04** Streamline marketing workflows by connecting tools and services you regularly use
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“Marketing teams on Slack experience 16% faster marketing campaign execution and carry out 8% more marketing campaigns per year.”

IDC research, sponsored by Slack, The Business Value of Slack, 2017



## Get access to information and internal experts company-wide

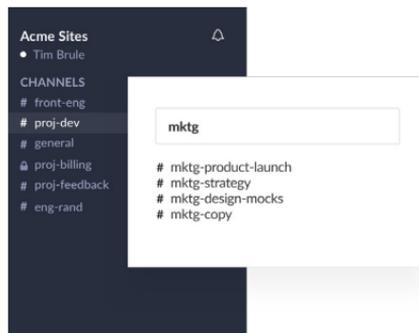
More than just a place to organize conversations, public channels automatically create a hub of knowledge that's searchable by everyone in your organization. If you commit to doing most of your work in public channels, when someone needs more insight to move a campaign forward—like the latest survey results or the status of a billboard design—all that information is readily accessible.

It's best to reserve private channels for sensitive or confidential conversations and direct messages for quick back-and-forths.



## Channel Tips:

- **Keep conversations focused:** Organize channels by team (**#marketing-team**), campaigns and feature launches (**#marcomm-2017** or **#feat-website**), and function (**#survey-notifications** or **#marketing-announcements**). Start with a few and add more as you go.



- **Name channels in a predictable way** so they're easier to look up and find, like an index. Prefixes help!
- **Keep tabs on conversations by starring important channels** so that they're pinned to the top of your sidebar.

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“Everyone on the project could easily understand this one seamless thread of discussion and work toward the same goal. When it all came together, it came together in Slack.”

**Lindsay Wester,**  
Senior Manager of Communications and Brand Marketing at Zipcar



## Turn insights into action lickety-split: Pulling real-time campaign data into Slack

Marketing teams need to pull from a wide set of data to make decisions and swiftly iterate on campaigns. Rather than sink your time into spreadsheets and flipping between tools, use these Slack apps and integrations to pull valuable real-time data from other platforms and services into channels where team discussions are already happening.

Pulling your data into public channels ensures that managers and other team members can stay updated on progress and results. And less juggling between apps and logins means you'll have fewer lags slowing you down.

### Integrating your marketing tools with Slack

Connect these apps and services to your Slack workspace to bring more of your team's workflows into one place.



**Statsbot:** Pull detailed Salesforce and Google Analytics reports and share them with the team, right from Slack.



**Ask Adstage:** Know when to boost or pause campaigns by tracking real-time click-through and conversion rates in Slack. Type `/Askadstage` in your message box to see campaign



analytics across Google and social media platforms and to pause campaigns instantly.



**Asana:** Keep everyone aligned and projects moving forward by pulling in updates from the project-tracking tool Asana. Create tasks, add comments, and mark them as complete without leaving the channel.



**Mailchimp:** See the status of email campaign engagement and receive updates when people subscribe and unsubscribe. Launch a message thread to discuss a specific result with the team in more detail.



**Marketo:** Receive automatic alerts when one of your marketing systems hits a snag and notify specific system administrators of the issue in channel.



**Zapier:** Use simple automation recipes (or Zaps) to track even more detailed data, like getting a digest of new Twitter followers sent to you in Slack daily, weekly, or monthly, or tracking hashtag mentions on Instagram photos and videos.

**Add these apps to your workspace and discover more in the [Marketing](#) category of the Slack app directory.**

[Explore Marketing Apps](#)



**Tip:** Set up weekly reminders (`/remind`) for yourself, a user group (`@marketing-team`, for example), or an entire channel to remind team members to post status updates on campaign progress and keep records up to date.



### 03

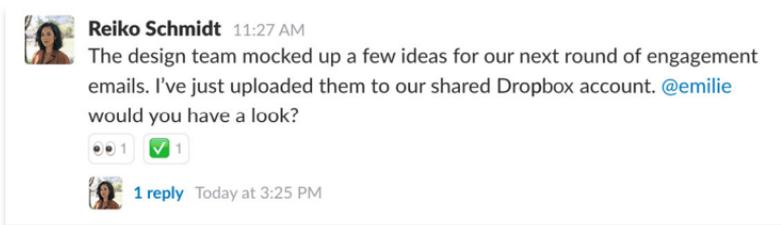
## Maintain momentum, get quick approvals, and keep customers happy:

### Working across teams in Slack

Let's pull these tips together with some examples of workflows that help you more easily connect with internal experts, contributors, and stakeholders.

#### Maintain momentum with fast feedback and approvals.

No need to call a meeting: Invite team members from across organizations into project channels to keep the production process going. Save even more time by using emoji to respond quickly while keeping chatter to a minimum and channels tidy.



A screenshot of a Slack message. The message is from Reiko Schmidt, sent at 11:27 AM. The text of the message reads: "The design team mocked up a few ideas for our next round of engagement emails. I've just uploaded them to our shared Dropbox account. @emilie would you have a look?". Below the text, there are two reaction buttons: one with a 👁️ icon and the number 1, and another with a ✅ icon and the number 1. At the bottom of the message, there is a reply button that says "1 reply" and the time "Today at 3:25 PM".



**Tip:** Need to discuss a design in more detail? [Launch a Slack call](#) and use [screen sharing](#), or add your favorite [video conferencing app](#) to Slack, to work on tweaks and improvements together.



## Sync with sales teams to give customers the white glove treatment

If an event, conference, or webinar figures into your campaign, make sure your invitation and RSVP lists stay updated with the help of the sales team. Just connect the [Salesforce app](#) to your workspace to automatically pull and share customer contact information right in Slack.

## Make an impression with real-time responses

Hooray! Your campaign is officially live and people are responding. Delight customers with your carefully crafted, well-timed responses: Add the [Twitter app](#) to a channel so you can funnel in customer comments and questions in real time, then invite writers and other creatives to help brainstorm supportive, witty, crowd-pleasing responses.



## Bring agencies, vendors, and partners into the fold: Working in Shared Channels

Communicating with ad agencies, PR firms, vendors and other external partners through emails, calls, and meetings can quickly create a lot of unnecessary stops and starts. Streamline your work and make external partners feel like part of the team by launching a shared channel to connect your Slack workspaces so you can keep each other posted on progress more often, find and share data, and drive results faster.



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“With Shared Channels in Slack, I can go between my internal teams and my external vendors instantaneously. Inviting them into one conversation really helped remove multiple steps that would otherwise have been there.”

Fred Saunders,  
Head of Branding and Marketing, CreditCards.com

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Learn how to create [shared channels](#).





# What's next?

There's lots to digest in this handbook, so here are a few things your team can do for starters to streamline your workflows, speed up your processes, and make information more accessible across teams.

## Checklist:

-  **Do a little channel clean-up:** Maintaining good channel hygiene is essential for keeping communication between teams and departments crystal clear. Make sure to periodically audit your channel list, archiving ones that are no longer relevant or useful. [Check out these tips for reducing noise in Slack.](#)
-  **Rethink your channel names:** Is there a consistent naming convention across all your channels? Are they labelled in a way that makes their purpose obvious? Take some time to rename channels so that they're easy to find and follow. [Learn more about channel naming best practices.](#)
-  **Give some apps a whirl:** Connect a few key services that you use often (like your analytics tools) to your team's workspace and try sharing and updating data directly in Slack. [Explore marketing apps for Slack.](#)

For detailed tips and how-tos on organizing channels, working with apps, and more, visit our [Help Center](#). Or if you prefer to talk to a human, reach out anytime at [feedback@slack.com](mailto:feedback@slack.com) or find us on Twitter [@slackhq](https://twitter.com/slackhq), and we'd be happy to help.





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