CIO Playbook:
How Salesforce Uses Slack to Run IT 💬

Salesforce | slack
from Salesforce
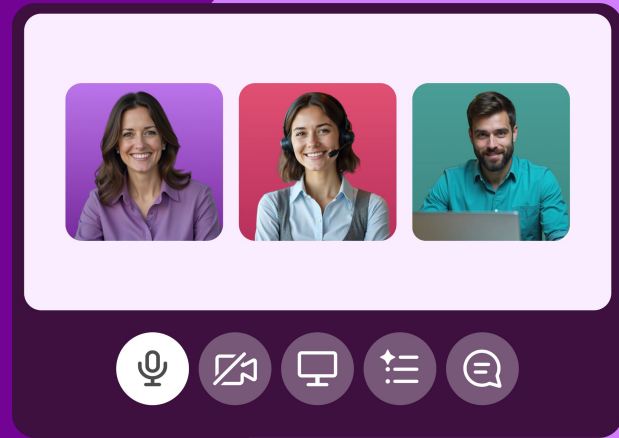
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Last updated: September 10, 2024

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Introduction

IT Before Slack

Salesforce IT once relied on siloed tools, scattered data, and manual processes that made it harder to move quickly and work together. These challenges made it clear we needed a better way to operate. That's what led us to Slack, and it became the foundation for how we work today.

Past

- Siloed tools, data & conversations

- Manual & time consuming tasks
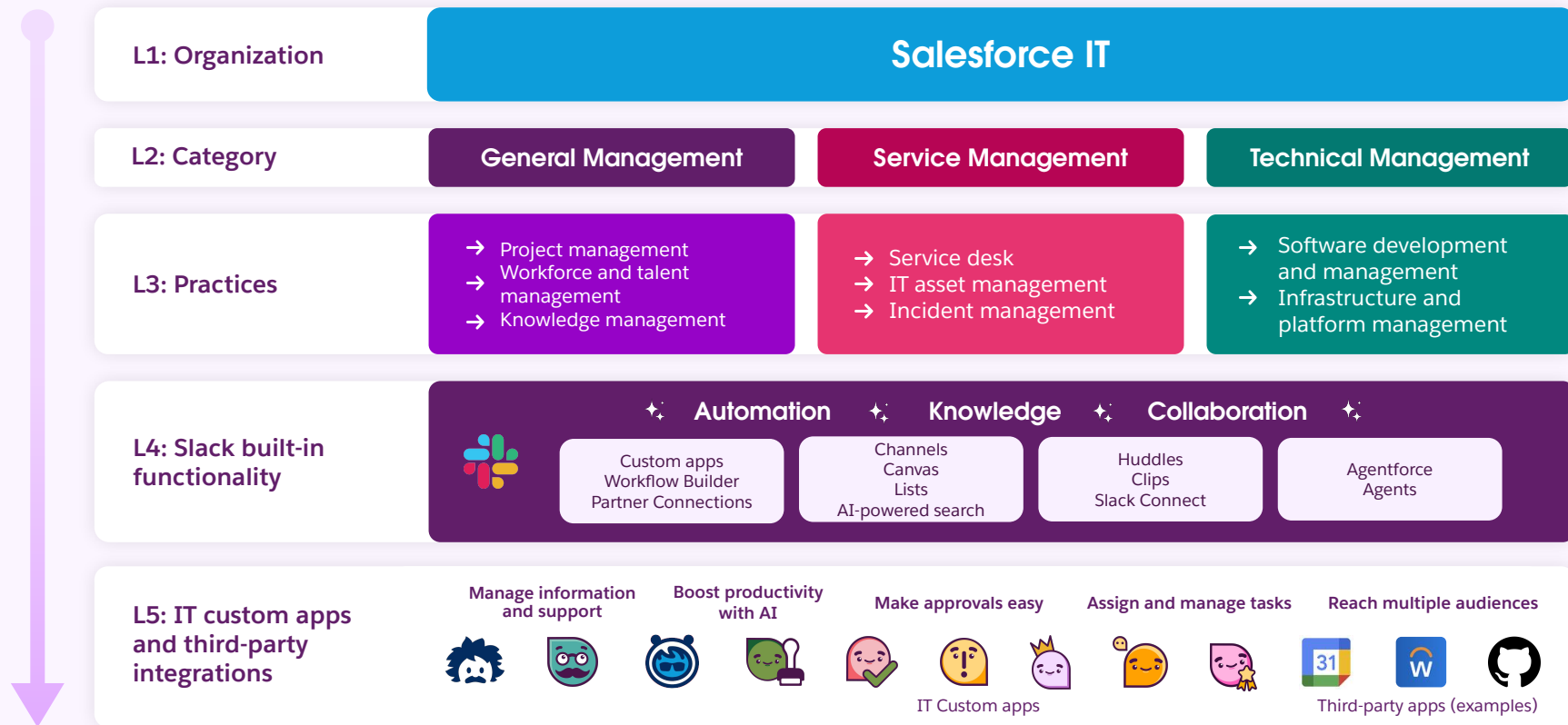
- Complex & inefficient processes

- Noise preventing focus

Today

Slack is the best way to run IT at Salesforce.

How We Leverage Slack to Run IT

L1: Organization	Salesforce IT		
L2: Category	**General Management**	**Service Management**	**Technical Management**
L3: Practices	→ Project management → Workforce and talent management → Knowledge management	→ Service desk → IT asset management → Incident management	→ Software development and management → Infrastructure and platform management

L4: Slack built-in functionality

✦ **Automation**   ✦ **Knowledge**   ✦ **Collaboration** ✦

Custom apps Workflow Builder Partner Connections	Channels Canvas Lists AI-powered search	Huddles Clips Slack Connect	Agentforce Agents

L5: IT custom apps and third-party integrations

Manage information and support	Boost productivity with AI	Make approvals easy	Assign and manage tasks	Reach multiple audiences

IT Custom apps

Third-party apps (examples)

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How Slack and Agentforce Drive Productivity as the #1 Digital Labor Platform

Agentforce is Salesforce's digital labor platform, enabling humans and agents to work together across systems and workflows.

What it is
Unifies people, agents, data, workflows, and apps into an operating system for work.

Why it matters
Enables seamless collaboration without swivel-chairing, lets you talk to your data, makes it easy to take action – boosting productivity with agents and workflows.

Why it's different
Brings humans and agents together in a comprehensive and beloved place to get work done..

What is Agentforce
Allows teammates and agents to collaborate– all in the flow of work.

ROCKET Companies

900+
workflows and over 120 apps integrated

Agentforce in Slack

Slack Actions
GA

Slack Enterprise Search
GA

General Management

Set up programs and projects for success

1. Create **project-specific channels** to streamline your work.

2. Enhance organization with the use of **bookmarks and Canvas**.

3. Schedule regular reminders using **workflows** to stay on track.

4. Keep your team informed and engaged by sharing updates through **posts or video clips**.

5. Let your **Agentforce Meetings Agent** take care of finding time to meet.
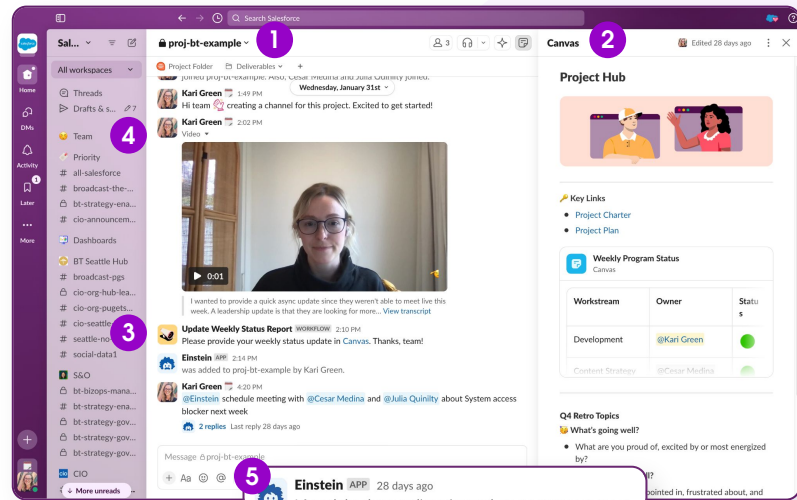
Slack features

Private channel · Workflows · Canvas

Custom apps and integrations

Agentforce Meetings Agent · **GCal**

Source: FY23 Q4 Slack Customer Tracking Survey

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Optimize your IT workforce with the right talent

The place to expand your career in IT
#det-careers is an open channel where employees can access career path guidelines and instantly view newly approved internal roles.

One-stop-shop for people managers
The channel is also a resource to facilitate job family, business title, and role profile change requests via workflows.
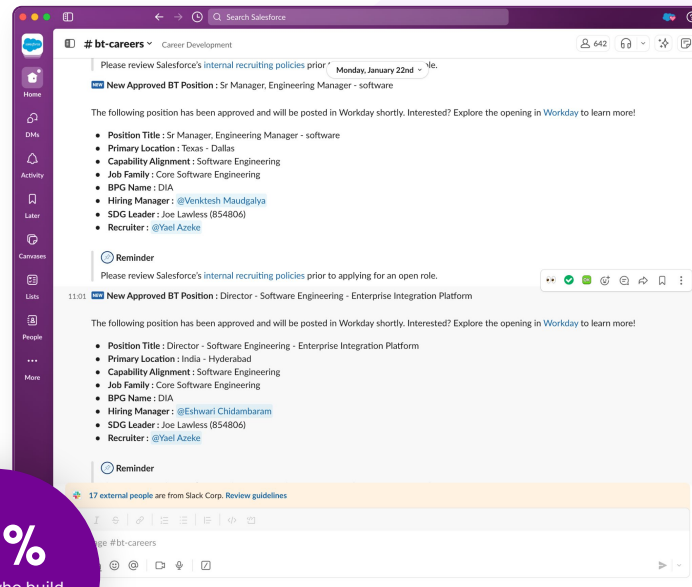

80%
of those who build Slack workflows are non-technical[1]

Slack features

Open channel

Workflows

Canvas

Source: 1) Slack internal data

Service Management

Enhance IT help

Accessing help though agents

Enables user to ask questions and get a response based upon direct knowledge base searches.

Custom app

Techforce Agent

AI-enabled app and available 24/7
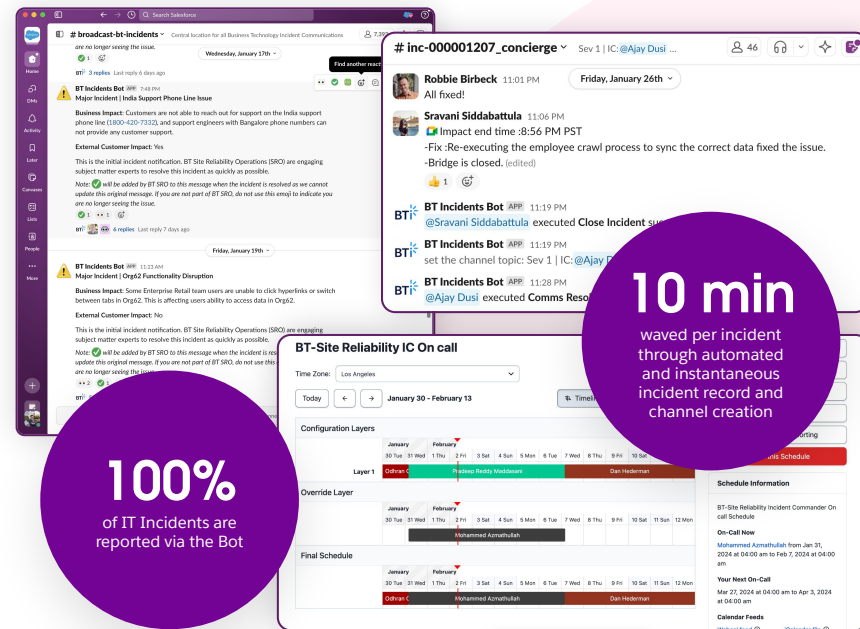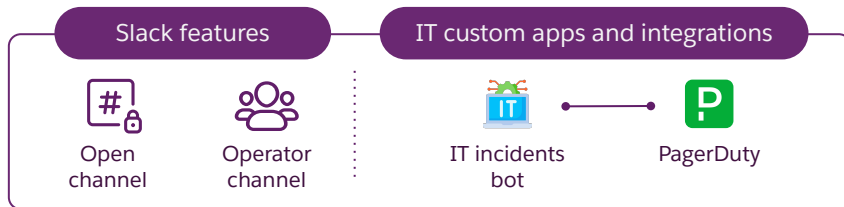to answer employee help questions.
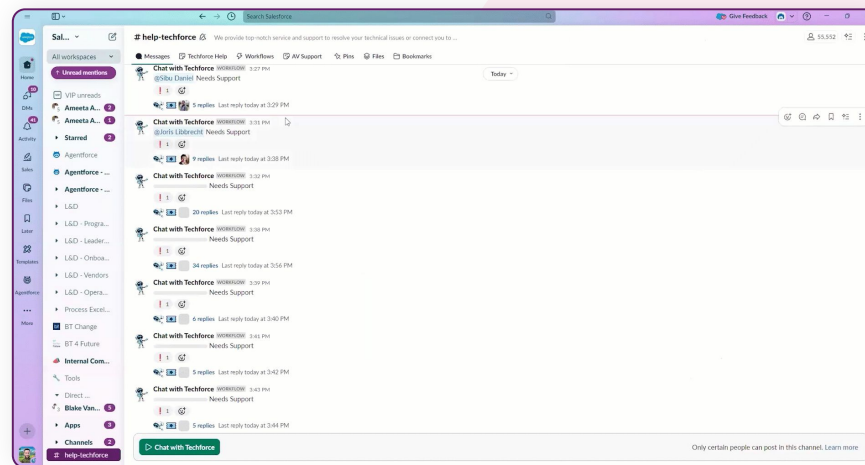
Respond to incidents faster

Proactive incident logging

Seamless incident management bot designed to enable anyone to log an incident, ensuring efficient communication of impact and details within an open channel.

Efficient resolution

The bot performs incident notifications, sends PagerDuty details to on-call engineers, and updates Supportforce record right from the incident channel.

10 min waved per incident through automated and instantaneous incident record and channel creation

100% of IT Incidents are reported via the Bot

Slack features	IT custom apps and integrations

Open channel | Operator channel

IT incidents bot | PagerDuty

Monitor audit logs

Audit log API

The audit log API can be used by customers to actively monitor where users are taking actions in their instance. Included in the audit log event items are details about the device that was used to take the action, as well as a hashed session ID that can be joined with the information from the sessions list.

Anomaly events

These can be flagged by a customer's SIEM such as Splunk or Panther and the session reset API can be used to terminate the session if needed. Microsoft Defender can also automatically terminate Slack sessions based on anomalous events..

Panther   Splunk

```
{
    "id": "dceaa5f1-3bae-466d-83cc-4d2b394ea8fe",
    "date_create": 1655126609,
    "action": "anomaly",
    "actor": {
      "type": "user",
      "user": {
        "id": "U03F1T5JKN0",
        "name": "카트만/CRM관리자/과장",
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        "team": "E03EST9MFUN"
      }
    },
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    },
    "details": {
      "action_timestamp": 1655119634509807,
      "location": "Seoul, KR",
      "previous_ip_address": "221.146.64.10",
      "previous_ua": "Mozilla/5.0 (Macintosh; Intel Mac OS X 10_15_7) AppleWebKit/537.36 (KHTML, like Gecko) Chrome/102.0.5005.61 Safari/537.36",
      "reason": [
        "user_agent"
      ]
    }
}
```

Govern and manage Slack content
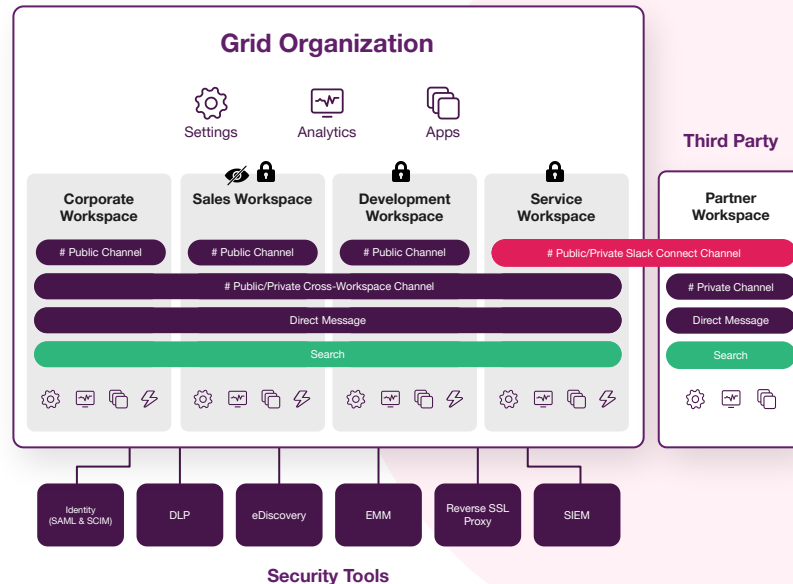
Slack Data Loss Prevention (DLP)

Using regular expressions, customers can block, warn, or log content being shared in Slack to ensure that employees are not sharing the wrong kinds of information using Slack's native DLP functionality.

Workspaces

Workspaces can be secured to limited sets of people in the organization, thereby ensuring that employees only have access to the information they need and nothing more.

Custom roles

Slack supports customizable administrator roles allowing you to define very specific role capabilities, narrowing the scope of administrative control for Slack.

Grid Organization

Settings   Analytics   Apps

Third Party

Corporate Workspace	Sales Workspace	Development Workspace	Service Workspace
# Public Channel	# Public Channel	# Public Channel	# Public/Private Slack Connect Channel

Public/Private Cross-Workspace Channel

Direct Message

Search

Partner Workspace
- # Private Channel
- Direct Message
- Search

Security Tools: Identity (SAML & SCIM) · DLP · eDiscovery · EMM · Reverse SSL Proxy · SIEM

Security Tools

eDiscovery — Archive and easily search your internal comms

Retain legally discoverable content

Automatically backup data from Slack and store it in a third-party data warehouse for archiving, discovery, and compliance.

Integrate with third party solutions like
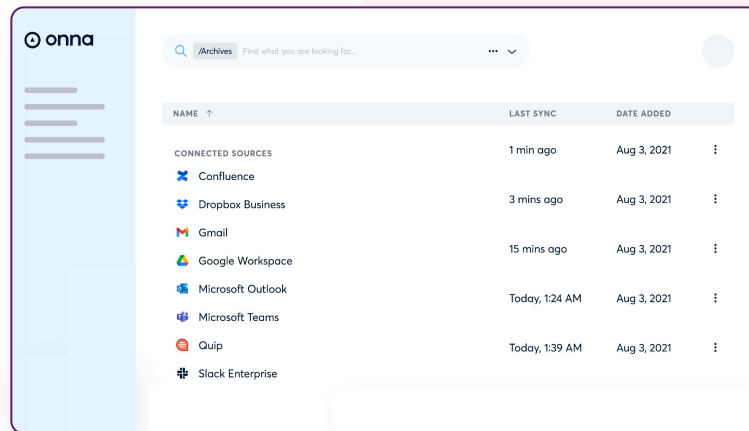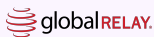
Accelerate productivity with AI

Use AI to analyze files

You can now upload plain files to @Einstein and prompt it to summarize the file, score it for readability, determine the tone, or generate an FAQ. From there, you can continue asking it questions about the file. Generative AI can automate analysis tasks that would have taken hours of manual work.

Custom app

Einstein

Saving hours per day per employee
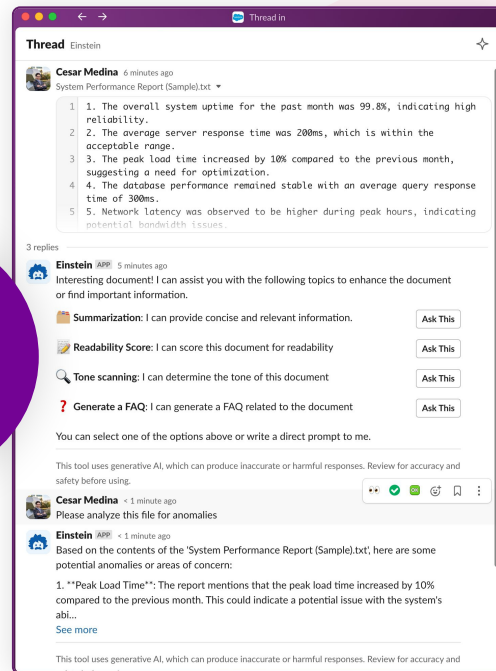
Technical Management

Increase higher quality delivery throughput

Supercharge collaboration

Using GitHub integration, the team effectively manages pull requests, merges, and deploys, enhancing collaboration. It provides real-time updates and integrated testing, reducing email and GitHub checks.

Custom app

Slack ←→ **GitHub**

Improved developer collaboration and increased velocity

Source: https://slack.github.com/
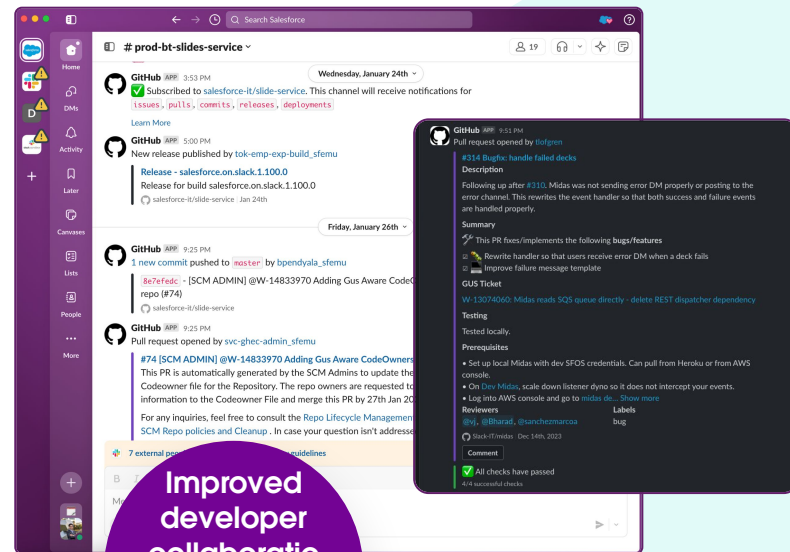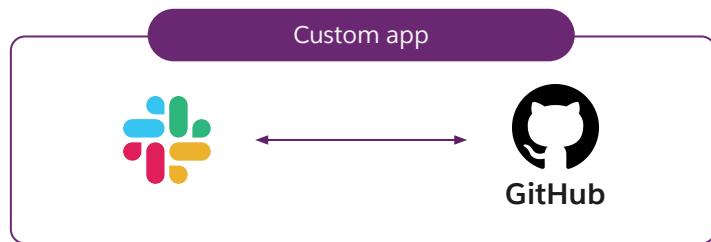
Ensure patching compliance

A task with impact

Patching compliance notifications are delivered as tasks – helping teams enhance security, prevent data breaches, ensure system stability, improve performance, and stay compliant.

IT custom app

TaskHub

Single source of truth for Salesforce assigned tasks.

Improved compliance rate and time to patch
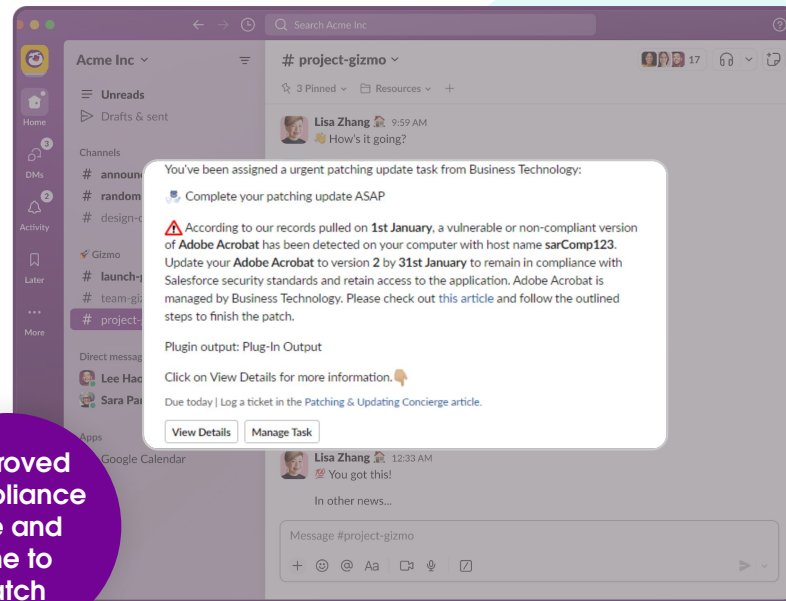
Ensure high quality releases with Lists

DRAFT
WORK IN PROGRESS

Execute with a List

Slack Lists streamline software deployment, enhancing team collaboration, tracking progress, and ensuring efficient, error-free deployment, thereby optimizing productivity and project outcomes.

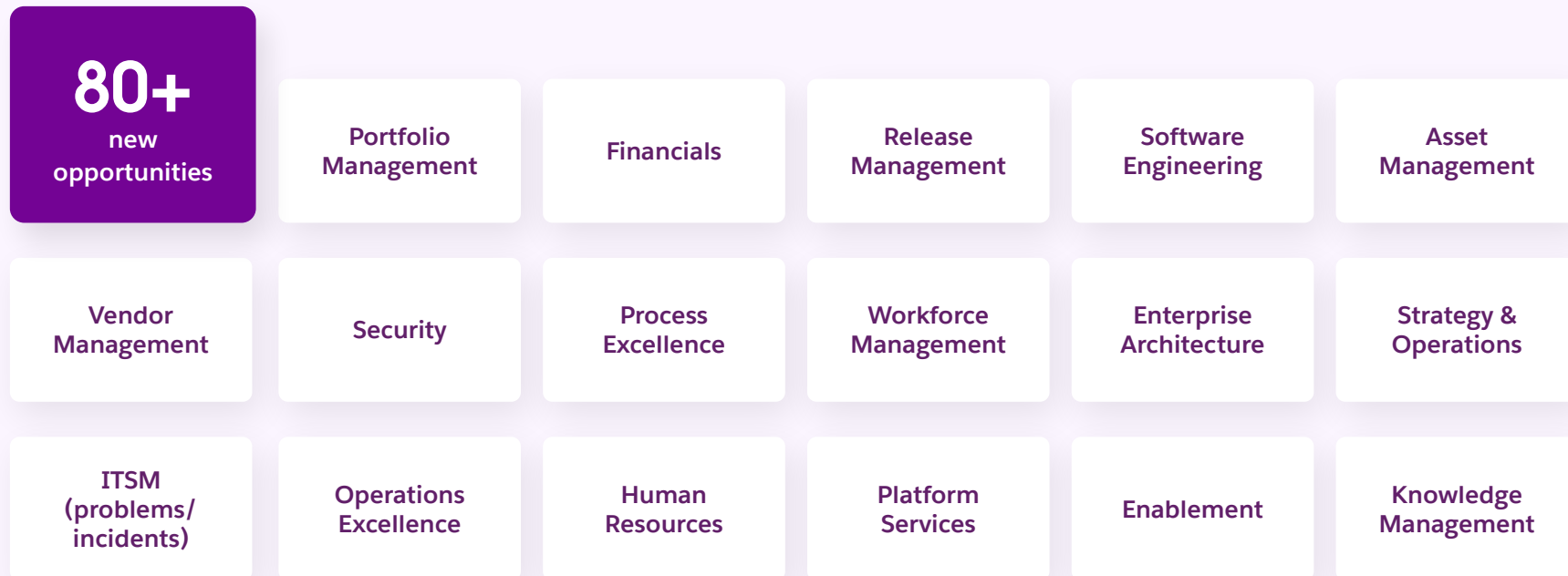**Slack features**

Lists
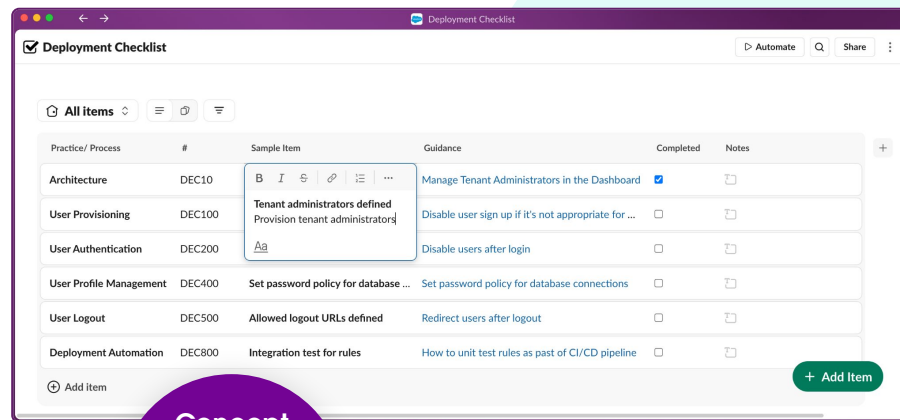
Concept exploration and development

Day in the Life of a CIO

1 Begins the day by summarizing relevant channels and threads using **Slack AI.**

2 Reviews his daily priorities in *Lists.* Acts on urgent matters and saves for *Later* what he could go back to in the afternoon.

3 Receives a *Tableau Dashboards Signal* in Slack with KPIs that need attention.

4 Hops on a *Huddle* with a team lead to address a problem area.

5 Reviews recent meeting notes in *Canvas.*

6 After lunch, reviews and approves expenses with the **Approvals Bot.**

7 Asks his AI personal assistant, **Einstein,** for some new technologies that could benefit the company.

8 Shares his findings with other leaders in a **Private Leadership Team Channel.**

9 Receives a notification in Slack from his **Google Calendar App** about an upcoming meeting, and clicks on the link to join.

10 Wraps up the day by recording a Clip with top of minds and posts in the #det-all channel.

There is Always Room for Improvement

At Salesforce IT, we continue to develop use cases across different areas. In a recent research and discovery initiative (Q1 FY25), we were able to uncover many new opportunities for Slack.

80+ new opportunities	Portfolio Management	Financials	Release Management	Software Engineering	Asset Management
Vendor Management	Security	Process Excellence	Workforce Management	Enterprise Architecture	Strategy & Operations
ITSM (problems/ incidents)	Operations Excellence	Human Resources	Platform Services	Enablement	Knowledge Management

Thank You