Slackbot Prompt Playbook

Work Smarter, Not Harder:
How to get the most out of Slackbot

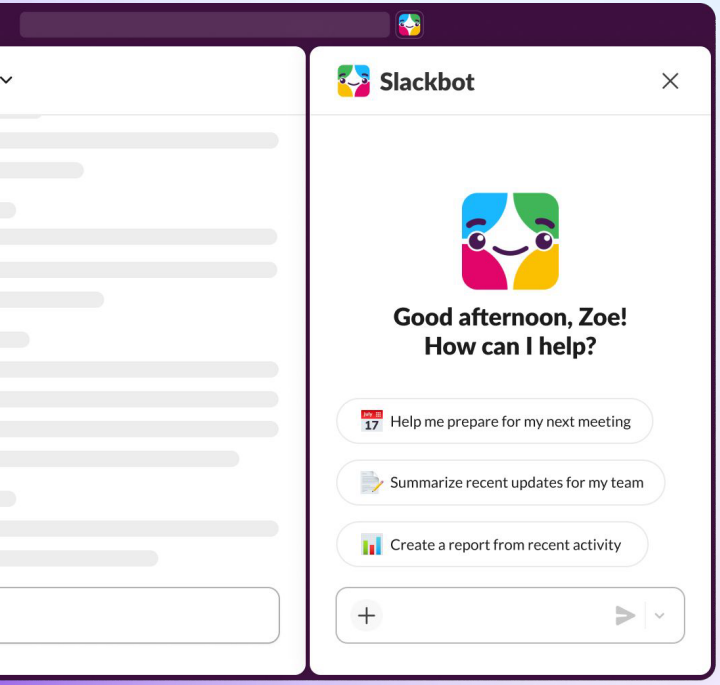
Your prompt playbook, at a glance

1. Meet Slackbot
2. How to write effective Slackbot prompts
3. 10 prompts for your daily workflow
4. Stealable Slackbot prompts for different teams
   - Sales
   - Service
   - Marketing
   - IT
   - Engineering
   - Legal
   - People managers

Jump to a section

Meet Slackbot

Your personal AI agent for work



What it is

A personalized AI agent inside Slack that understands your conversations, files, projects, and contacts. It helps you search, organize, draft, and take action in the flow of work - no setup, no extra tools.

Why it matters

Stay focused and get things done without jumping between apps.
Get personalized support that takes work off your plate.
Boost productivity with an AI companion you can actually talk to.

Why it's different

Slack-native, context-aware, and secure, combining search, content creation, reminders, and personalization in one trusted place where work already happens.

slack
from Salesforce

How to write effective Slackbot prompts

Good prompts are clear, specific, & contextual.

Poor prompt:

Help me draft my email.

Better prompt:

Draft a follow-up email to [customer name] about the delayed shipment. Include some of the notes from this [brief] document.

What to think about for prompt writing

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Set the Scene

Give background information when it matters.
I'm a product marketing manager preparing for a quarterly review"

Specify what you want:
Bullet points vs. paragraphs. A specific length ("in 100 words or less"). A particular tone ("professional but friendly"). Step-by-step instructions vs. a summary

Pro Tip: One of the most forgotten prompt lines is date ranges. “I want information only from September to December” helps me give you the best results

Stack Your Asks

Combine related requests into one task:
“Draft an email and find supporting examples to include”

Instead of asking for everything at once, try:
"First help me brainstorm ideas, and then we'll refine the best one into a full proposal based on which idea I like.”

Pro Tip: Think about complete workflows and outline that for me. We can work together in steps and through multiple prompts to get to the result you want

Refine, Refine, Refine

Don’t settle for the first prompt you try:
Sometimes I may not hit the mark on the first try, give me another set of instructions or even ask for 3 different approaches to get variety

Show what you're looking for:
“Review this document here for inspiration, can you follow this style but include the information from [channel] or [document] instead?

Pro Tip: Defining who your audience is can help get you closer to what you’re looking for initially

Slackbot Prompt Power Ups

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	❌ Instead of…	✅ Try this…
Be specific about Output	“Summarise this transcript”	*"Organize action items into a table and put this in a canvas."*
Reference your Context	“What did I miss”	*“What did I miss from **yesterday at 5pm** in **#sales-team** about the **T&E budget**”*
Use If-Then Logic	"Analyze these messages and tell me if anyone needs help."	*"Search for customer feedback on Feature X. **IF** they mention 'login issue,**then** create a summary canvas"*
Reference your Role	“What blockers should I be aware of”	*“**As project lead**, what blockers should I be aware of?”*
Use Positive Examples	"Don't give me a generic response that is too long or uses corporate jargon."	*“Please keep your response **concise and conversational**”*

AI Considerations: Using AI Responsibly

slack from Salesforce

✅ **AI can be wrong** - Always verify important information from multiple sources

✅ **Check your sources** - Trace information back to original, credible sources

✅ **Human oversight matters** - Use AI as a tool to augment, not replace, human judgment

✅ **Bias awareness** - AI systems can reflect biases present in their training data

✅ **Context is key** - AI may miss nuances, cultural context, or recent developments

✅ **Privacy & security** - Be mindful when creating channels if conversations should be private or public

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Start Here

10 prompts for your daily workflow

Most Stealable Prompts

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Slackbot for Everyday

☀️ Morning Triage

Catch me up on what I missed overnight. **Summarize important conversations** from my key channels.

What DMs or mentions do I need to follow up on today? Show me anything that might need my action.

Help me prioritize my day – what are the most urgent items across my messages and channels?

⚡ Mid-Day Alignment

What are my upcoming meetings and **what context** should I know for each one?

Provide me with a summary of [document/canvas] that I can read between my meetings

Are there any cross-team conversations I should be aware of that might impact my work?

Find any requests for help or expertise in channels where I could contribute

🌙 End of Day Follow Ups

What commitments did I make this week that I have should follow up on?

Show me threads where I participated but there have been new replies I might have missed

Find any messages where someone asked me a question but I haven't responded yet

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Get inspired

Slackbot prompts for different teams

Most Stealable Prompts

slack from Salesforce

Slackbot for Sales

📅 Meeting Mastery

Help me prep for my meeting with [Customer Name] tomorrow - pull recent conversations, support tickets, and any mentions of renewals or expansions

What are [Account's] **top 3 pain points** from recent conversations?

Create an executive briefing for [Account] that includes company summary, pipeline status, and key stakeholder insights from our conversations

Save Hours on Prep

💼 Deal Intelligence

What are the key risks in my [Account Name] deal based on our recent conversations?

Summarize the current status of my [Account Name] opportunity and identify any missing qualification information

Help me identify expansion signals from [Account] - mentions of team growth, new use cases, or capacity constraints

Win Faster

⚙️ Account Strategy

How should I position Slack against [Competitor] for [Account Name] based on their specific requirements?

Draft a personalized outreach sequence for [Prospect] that references their recent [news/funding/expansion]. Pull information from this PDF I've uploaded on the company.

Research [Company Name] and create a strategic POV on how Slack can address their digital transformation goals

Research in Minutes

Three Real Examples from AEs that are using Slackbot today 👇

slack from Salesforce

Last-Minute SIC Entry

Pulled into a four-month SIC engagement w/only 2 weeks to go and need to provide a POV on Art of Possible

Solution Prompt:

Summarize this channel and documents to give me an overview of our Art of the Possible story for [customer] then suggest upgrade use cases.

Expert-level contributions

CFO Discovery

First discovery meeting with CFO at a 3.5K Greenfield company, needed to speak his language

Solution Prompt:

Create a CFO battlecard with priorities, strategic questions, and key value props aligned to Salesforce positioning for [Account]

Prepared for the Meeting in <1 hr

Scorecard Bottleneck

Spending ~60 minutes on detailed opportunity scorecards – blocking deal progression and eating selling time

Solution Prompt:

Generate scorecard details and scoring for this [opportunity] using our Slack conversation data.

30x faster scorecard completion

Or try this! Ask Slackbot to tell you something you don't know about yourself

Most Stealable Prompts

slack from Salesforce

Slackbot for Service

🎫Case Intelligence

Analyze all customer cases this week and identify the top 3 recurring issues within my team

Pull all open escalations and provide a summary of current state. Highlight any discussions where I may be able to jump in to help support

Summarize feedback from difficult cases to improve our resolution process. Provide sample quotes from customer cases

Solve cases faster

🔎Customer Insights

Track customer sentiment from support conversation(s). What have we done well in conversations that have gone well or where could we improve?

Overview product issues that customers are reporting the most consistently across all channels. Share any ongoing discussions about the issue.

Identify customers who have mentioned considering alternatives. Where possible, find the account's Sales reps so I can do a reachout.

Know your customer

🤖Process Optimization

Review support team discussions for workflow bottlenecks and pain points

Highlight any manual tasks people on my team are highlighting takes a lot of time. Pull recommendations for automations.

Compile best practices for [case type] based on cases where customers have been really happy with their support experience

Work smarter

Three Real Examples of Service Reps using Slackbot today

slack from Salesforce

Customer Issue Analysis

Multiple customers are writing in with a similar issue and need a quick overview of similarities in their cases for resolution

Solution Prompt:

Review all support cases where customers are reporting this issue that were submitted in the last hour. Help me identify any similarities in their cases: setup, reported devices or common product behaviour

Faster pattern recognition

Customer Context for Call

Customer meeting starting in 30 minutes but need comprehensive account context across all recently submitted support cases

Solution Prompt:

Create a detailed brief pulling key account details, key contacts, and any relevant support history that will help prepare me to support them over a call

Instant customer context

Escalation Handling

High-stakes customer escalation requires delicate handling full account context and clear technical explanations

Solution Prompt:

Help me prep for this difficult call with [customer]. Include their account value, key information, relationship history, support tickets and draft a response explaining the current technical issues in simple terms

Professional crisis management

Or try this! Ask Slackbot to analyze your team's top 3 support case trends to address!

Most Stealable Prompts

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Slackbot for Marketing

📊Campaign Performance

Summarize feedback on our last campaign from all channels. What worked well and where could we change our strategy?

Research all mentions of our brand or product launch across the company this week

Review what Sales teams are saying about our new marketing materials and messaging on [campaign]

Track impact

🧑Audience Insights

Analyze customer feedback discussions to identify trending pain points for our next campaign on [feature/product]

Find conversations about our competitor markets and what teams are hearing in the market to help us position our product more effectively

Give me a list of questions our support teams are getting that could inform our content strategy

Know your audience

🖌️Content & Messaging

Review this campaign copy for brand voice consistency across all our guidelines

Compile examples of messaging that resonated well in the past launches for inspiration. What stood out to customers?

What content or topics are teams most excited about based on recent discussions in Slack?

Content creation

Three Real Examples from Marketing Specialists using Slackbot today 👇

slack from Salesforce

Campaign Launch Sequence

Need to create social teasers for product launches with consistent brand and voice across channels

Solution Prompt:

Take all of our documentation and turn it into a sequence of tweets that could tease our new feature leading up to launch

Sequential content in minutes

Marketing Automation Setup

Manual status updates across 5 marketing channels is eating up daily productivity time

Solution Prompt:

Write automation scripts I can follow to connect my spreadsheet to Slack and post channel updates when campaigns are marked “ready for launch”

Automated workflow setup

On-brand Content Creation

Need for realistic prototype designs that reflect actual industry terminology and use cases

Solution Prompt:

Use these brand guidelines, campaign examples, and customer testimonials I’m uploading to write realistic marketing copy that represents our customers

Context-aware copy instantly

Or try this! Ask Slackbot to review your campaign performance and suggest new ideas!

Most Stealable Prompts

slack from Salesforce

Slackbot for Engineering

🐛 Bug Tracking

Find all reports of this bug across channels and summarize the user impact. Prioritize conversations of customer impact

What production issues is the team discussing today that need engineering attention?

Create a summary of this week's critical bugs with affected users and workarounds to be uploaded into [bug mgt system]

Fix faster

💻 Code Reviews & Releases

Summarize all IT requests from this week and identify most common issues

What are teams saying all IT requests from this week and identify most common issues

Spot all IT requests from this week and identify most common issues

Ship smarter

📄 Tech Debt & Planning

Identify recurring technical complaints from product teams for sprint planning

Review performance or scalability concerns that have been mentioned in this [project/product area/quarter]

Gather and synthesize all discussions about outdated systems or processes that need modernization

Build better

Three Real Examples from Engineers using Slackbot today 👇

slack from Salesforce

Incident Response

Manually analyzing incident channel patterns and trends before shift handoffs to identify ongoing issues and escalation points

Solution Prompt:

I'm taking over the current incident. Summarize the incident for me, and then give me a view of what should I be aware of, what's still unresolved, and who still needs answers on any open questions in channel?

Jump into an incident in minutes

Product Brief Workflow

Spending hours creating briefs and sprint planning from scattered feedback across multiple sources in Slack

Solution Prompt:

Review all channels that are currently discussing [product issue]. Take all available feedback, data, and key conversation points and create an in-depth product brief

Pull together all conversations

Code Documentation

Legacy codebase with zero documentation so team members are delayed in onboarding and fixing bugs

Solution Prompt:

Review this code repository and generate comprehensive inline comments, technical documentation and API specifications based on existing functionality

Time back to focus on coding

Or try this! Ask Slackbot to summarize a long troubleshooting thread for a bug report!

Most Stealable Prompts

slack from Salesforce

Slackbot for IT

🎟️Ticket Intelligence

Summarize all IT requests from this week and identify most common issues

Flag recurring problems in [channel name] discussion to create better documentation

What are the top 3 IT issues people are struggling with based on Slack conversations?

Spot patterns fast

🔧System Monitoring

Pull all mentions of system outages or performance issues across channels today

Search for any discussions about broken tools or access problems. Provide some insights on how these have been resolved before.

Summarize user complaints/sentiment about specific applications or services.

Catch issues early

📚Knowledge Base

Create documentation from this solved IT issues for future reference.

Find all best solutions shared in IT channels for common problems.

Convert this troubleshooting conversation into a reusable how-to-guide

Build smarter docs

Three Real Examples from IT Reps using Slackbot today 👇

slack from Salesforce

Help Desk Queries

Overload of IT cases and waiting for support channel responses for basic questions is causing ticket backlog

Solution Prompt:

Search our IT support channel for similar questions, review current documentation and draft a response I can quickly send back to resolve the users query

Resolve backlogs quickly

Workspace Admin

Reviewing audit logs and user activity data to identify inactive accounts, unused channels and workspace optimization opportunities

Solution Prompt:

Review our workspace audit logs to identify guest users who haven't logged in for 30+ days and suggest cleanup actions for workspace optimization

Automated Admin insights

Email Integration Setup

Configuring email platform connectors and troubleshooting integration issues between Slack and email

Solution Prompt:

Summarize this [documentation] for setting up Gmail and Outlook connectors into Slack. I'm at this step with a user and I'm running into an authentication error. What options could we try next?

Comprehensive setup guidance

Or try this! Ask Slackbot to pull trends in your recent IT tickets for proactive solutions!

Most Stealable Prompts

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Slackbot for Legal

👀Case Monitoring

Find all legal cases opened by Sales teams this quarter and identify trending issues

Summarize common questions from legal discussions in #legal-channel. Generate common answers to these questions for an FAQ.

Create a report of new legal requests and their status. Prioritize cases that need more immediate help or are escalated.

Cut tracking time

🔍Compliance & Risk

Review this marketing campaign for legal compliance requirements.

Based on previous conversations provide a historical overview on if this customer needs legal review based on recent T&Cs?

Flag potential compliance risks in upcoming product announcements. Highlight areas we could be more proactive partners.

Prevent costly gaps

🧠Contract Intelligence

Extract key terms and deadlines from this [contract attachment]. Bring all information into a canvas for review.

Compare this agreement to our standard terms and highlight differences.

Generate a contact summary with key renewal date and obligations to the customer. Provide any next steps for review.

Extract key details

Three Real Examples from Legal teams using Slackbot today 👇

slack from Salesforce

Contract Review Bottleneck

Legal TPM analyzing Program Sprint Planning canvas to automatically generate executive updates and identify cross-team risks

Solution Prompt:

Review our Program Sprint Planning canvas and generate executive summary bullets highlighting key deliverables, blockers, and cross-team risks for leadership review

Expert-level analysis in minutes

Patent Discovery Sprint

Patent team conducting real-time monitoring of technical discussions to identify innovative ideas for patent evaluation

Solution Prompt:

Scan technology, product, and design channels from the last 30 days to identify the most innovative patentable ideas and evaluate them against novelty and eligibility criteria

Real-time innovation discovery

Legal Case Monitoring

Strategic team monitoring Slack conversations about legal counsel and case openings to identify trending issues and support needs

Solution Prompt:

Find legal cases being opened by Sales teams and surface trending issues, root causes, and common questions from chatter discussions

Immediate proactive insights

Or try this! Ask Slackbot to analyze your team's legal processes and suggest automation!

Most Stealable Prompts

slack from Salesforce

Slackbot for People Managers

📈Team Performance

Summarize my team's activity this week. Highlight wins, areas of opportunity and collaboration patterns

What are the recurring themes in my team's discussions? Identify how I can help support or what processes we have should think about developing

Look through my DMs and share anything I might have missed that needs attention

Stay connected

🏆Talent Development

Find examples of my team members going above and beyond. Craft me a post recognizing their work I can share in my team channel

Identify subject matter experts on my team based on what colleagues ask for help and who is able to resolve those questions

What professional development topics would my team be interested in based on their Slack participation?

Unlock the team

💬1-1 Prep

Help me prep for my 1-1 with my direct report. Pull recent conversations, project updates and any wins

Create talking points should I bring up in my 1-1's this week? Focus on my direct reports cross-functional projects or updates to ongoing work

Scan for mentions of blockers or challenges from my team member for our 1:1 agenda items

Prep smarter

Three Real Examples from People Managers using Slackbot today 👇

slack from Salesforce

Unblocking the Team

Direct report stuck on a critical project with deadline approaching - need to quickly understand blockers and provide actionable guidance

Solution Prompt:

Analyze this project channel and recent team updates to help me understand where my direct is stuck, and how I can unblock them without taking over their work

Proactive problem solving

Team Meeting Prep

Calling a team meeting and need inspiration for the most effective way to run the call based on what everyone's working on

Solution Prompt:

Review our team's recent work updates and project discussions to help me design an engaging team call agenda that builds on current momentum and encourages collaboration

High quality team connections

Feedback Synthesis

Looking to pull some recent examples in the last quarter of work your direct did in Slack to help supplement their quarterly check-in

Solution Prompt:

Look across Slack for examples of work [name] has done. I'm looking for examples of great work or areas of opportunity I can use to help supplement our check-in conversation

Holistic view of impact

Or try this! Ask Slackbot to analyze your team's communication patterns for specific insights!