Boost Your Sales Team's Productivity with Slack



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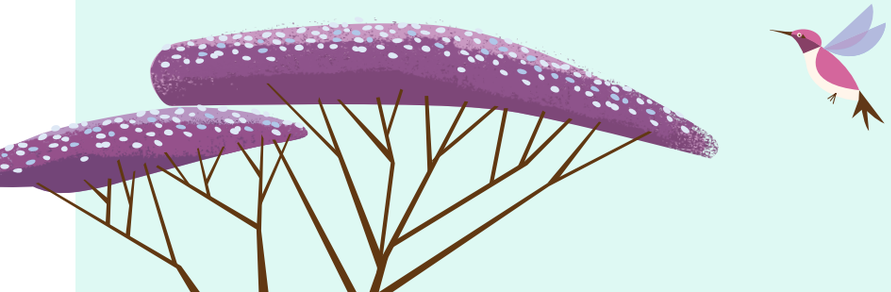
Introduction

A sales team's success often hinges on relationships with customers. Of course, building relationships takes time. If reps can spend more time providing excellent service at every stage of the sales cycle, they'll likely not only hit their revenue goals, but also position themselves to drive more business in the future. This is why building a productive sales team is crucial to a business's financial health.

However, sellers must weigh changing customer needs and expectations, and macroeconomic conditions that lead to longer sales cycles.

Slack customers report that their sales teams see a 35% increase in their win rate.*

*Salesforce, FY24 Customer Success Metrics, August 2023



Today, **80% of organizations are increasing their revenue targets, but only 43% are adding sales headcount**. With the stakes being so high, it's no wonder that **67% of sales reps say that they don't expect to meet their quota this year, and 87% said they missed it last year**. Sales reps are being challenged to do more with less and they need a better way to work faster and smarter.

Sales leaders must increase their reps' productivity so they spend more time with customers and less time on tasks that don't move their business forward. How? By having humans and agents work together in a work operating system that centralizes the tools, data, and context their team needs. Sales reps can easily boost productivity when work happens in the AI-powered conversational interface for Salesforce – Slack.

Imagine if your sales reps could quickly manage CRM data from any device so they could update deals on the go. What if they could collaborate with all their cross-functional partners around a deal with the most up-to-date information at their fingertips? Doing this would make it easy to expedite manual tasks and approvals and move deals forward. This is the value of Slack to your sales team – one comprehensive, AI-powered work operating system where humans and agents drive success together.

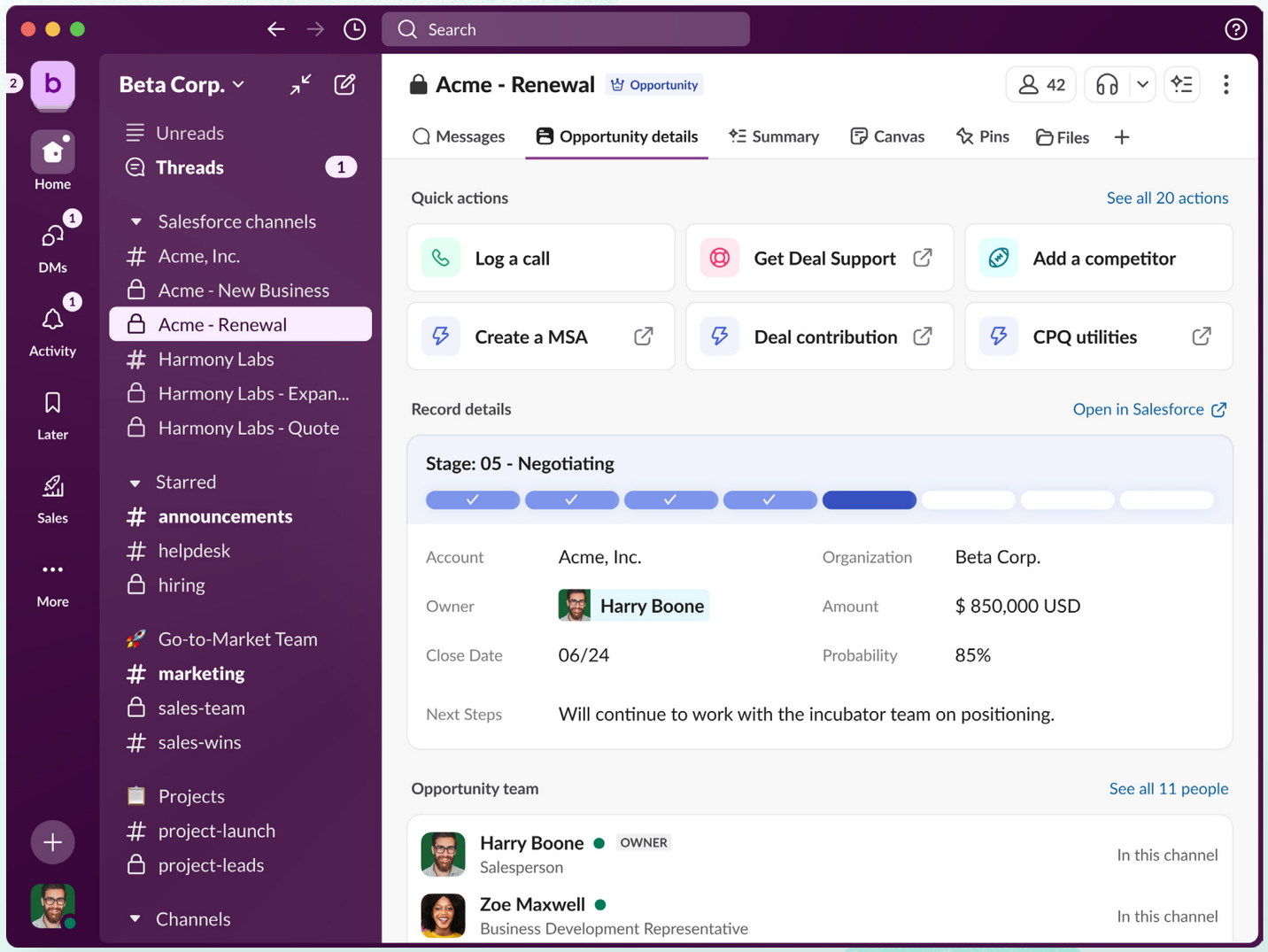
Read on to learn how sales teams can use Slack as the conversational interface for Salesforce to:

- Drive team selling and shorten deal cycles
- Accelerate work with automation
- Manage their book of business
- Nurture stronger relationships with customers

Transform team selling and shorten the deal cycle with Salesforce channels

Closing deals is a team effort. Sales reps often rely on partners from legal, product, and procurement departments to get the answers and approvals they need to close deals. But when people aren't working together in a centralized space and their customer data is stuck in multiple systems, it's challenging to be aligned and work quickly, resulting in poor customer experiences and slipped deals.

To keep pace with rising customer expectations, teams need to work together efficiently, with a complete, shared understanding of the customer across conversations and CRM. Enter Salesforce channels, a new type of Slack channel that brings CRM data from Salesforce records, including opportunities, cases, and custom objects, into Slack.



Whether they're working from their desktop or mobile device, reps can make edits to the records in the channels and the information automatically updates in Salesforce. Data management is also secure: people can only see and edit the information in Slack that they have permissions for in Salesforce.

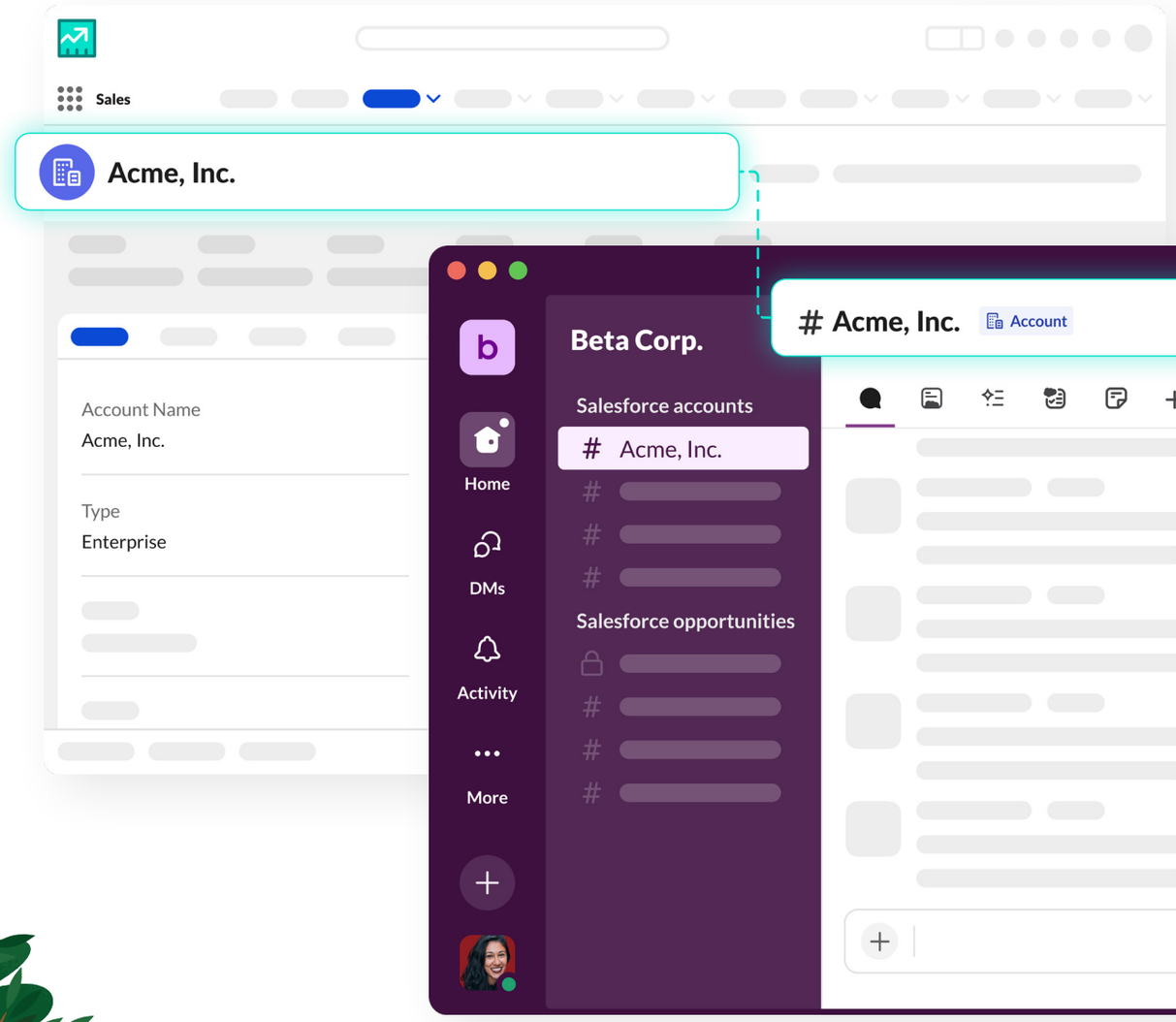
When every discussion is tied to a record, teams can make data-informed decisions faster. Account teams can use these channels to get an overview of their customer, strategize how to navigate complex issues, and manage requests and approvals more efficiently with partners across departments.

Cross-functional partners and new team members can hit the ground running when they're brought in for support by instantly joining conversations and reviewing message history in **threads**, which help you create organized discussions around specific messages. For example, reps can catch up on a conversation and then tag a product engineer in a thread to get clarification on a product feature.

Soon, Salesforce channels will also be available in the Salesforce UI, empowering teams to sell together more efficiently and deliver the best possible experience for customers no matter where they're working.

Pro Tip

Reps can work even more efficiently by using Slack AI, our trusted generative AI experience built directly into Slack, to produce a **conversation summary** of what was discussed in the thread in one click.

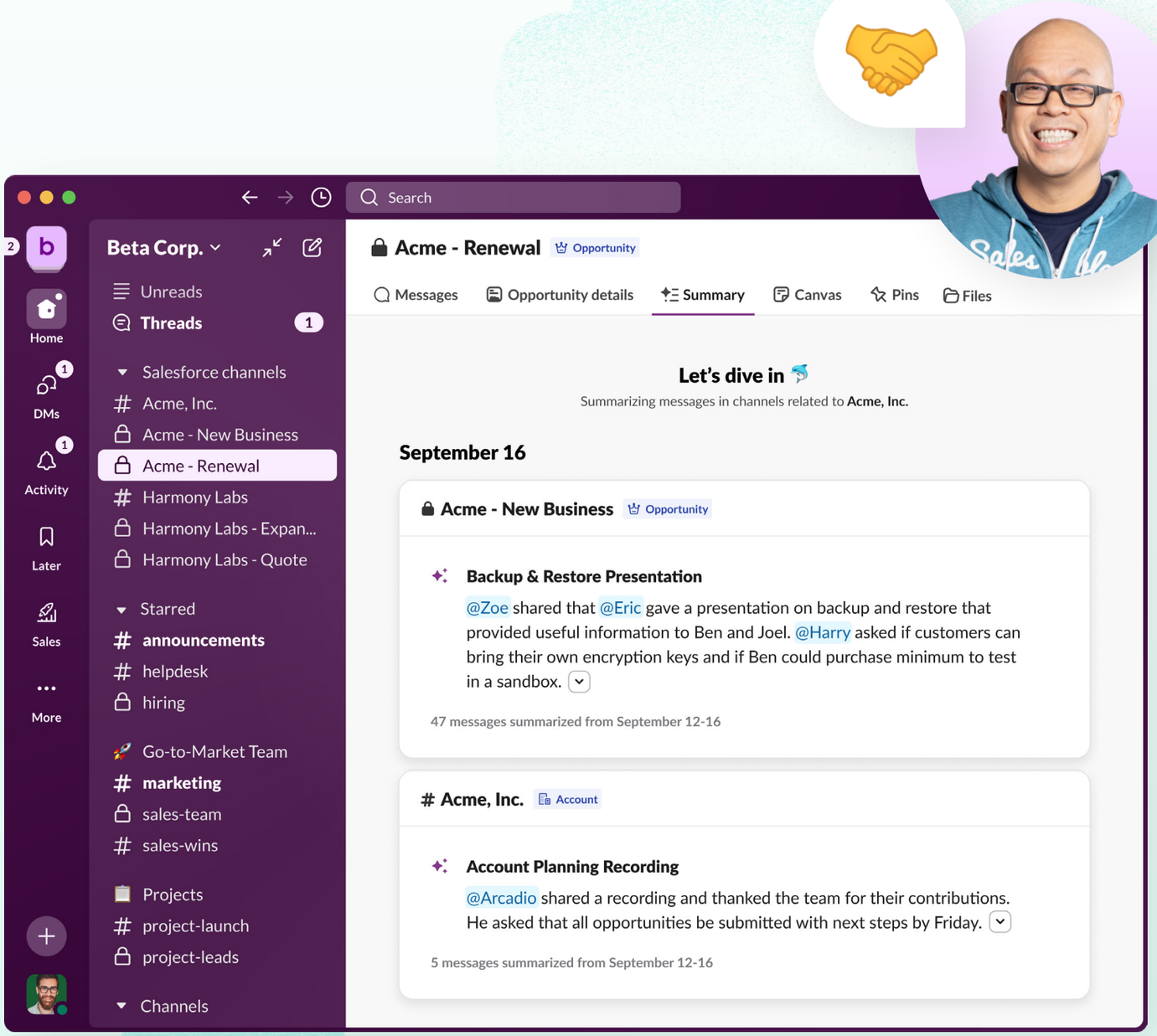




Speed up collaboration and get customer insights faster with native AI capabilities

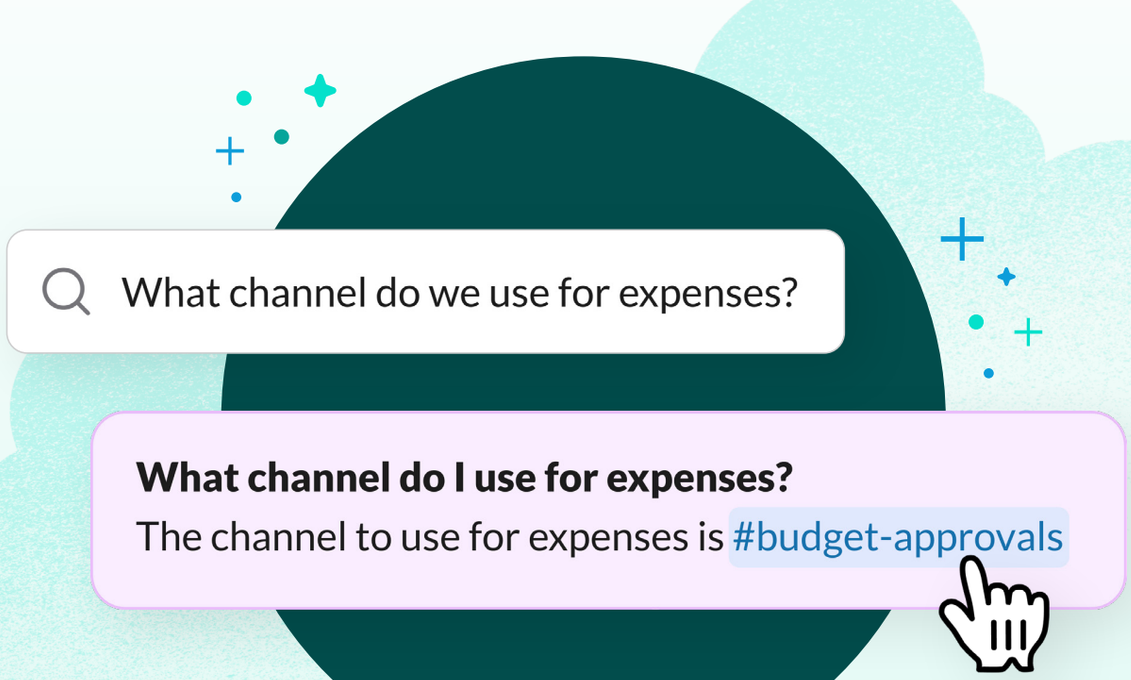
Slack AI adds another layer of efficiency to team selling by tapping into the rich knowledge repository in your channels. All of our Slack AI features help gather relevant and useful information for your teams in seconds so reps can close deals faster.

As we introduced earlier, **conversation summaries** help catch you up on discussions in your channels and threads quickly. If your rep has been assigned a new account and wants to get caught up to speed on the deal, they can generate a summary of all the conversations in a specific account channel rather than read through dozens of exchanges in threads. Every summary generates citations, and in just a click your rep can dive deeper into a discussion about why the deal has been stalled. The same functionality applies to Salesforce channels.



Another time-saving Slack AI feature is **search answers**. You can use it to ask anything in a conversational way, and if the information is available to you in shared files, canvases, apps, and conversations from your channels, search answers will provide you with a thorough summary of what you need in the same amount of time (or less) that it would take to set up a meeting. Search answers are helpful if you're looking for a pitch deck you can use for a new customer, or you want a summary of a file someone sent you before your next customer meeting. Just like conversation summaries, you'll get answers with citations.

Last but not least, **recaps** generate a personalized daily digest of what's happening in select channels. These come in handy when you want to know what's happening across your teams and projects but you're on the road to meet a customer or just don't have the time to stay on top of certain channels. You simply add the channels you want to your recap and Slack AI does the rest. The next day, you'll begin receiving a daily digest of anything you missed – such as a deal at risk – so you can focus on how you can best help steer your team to success.

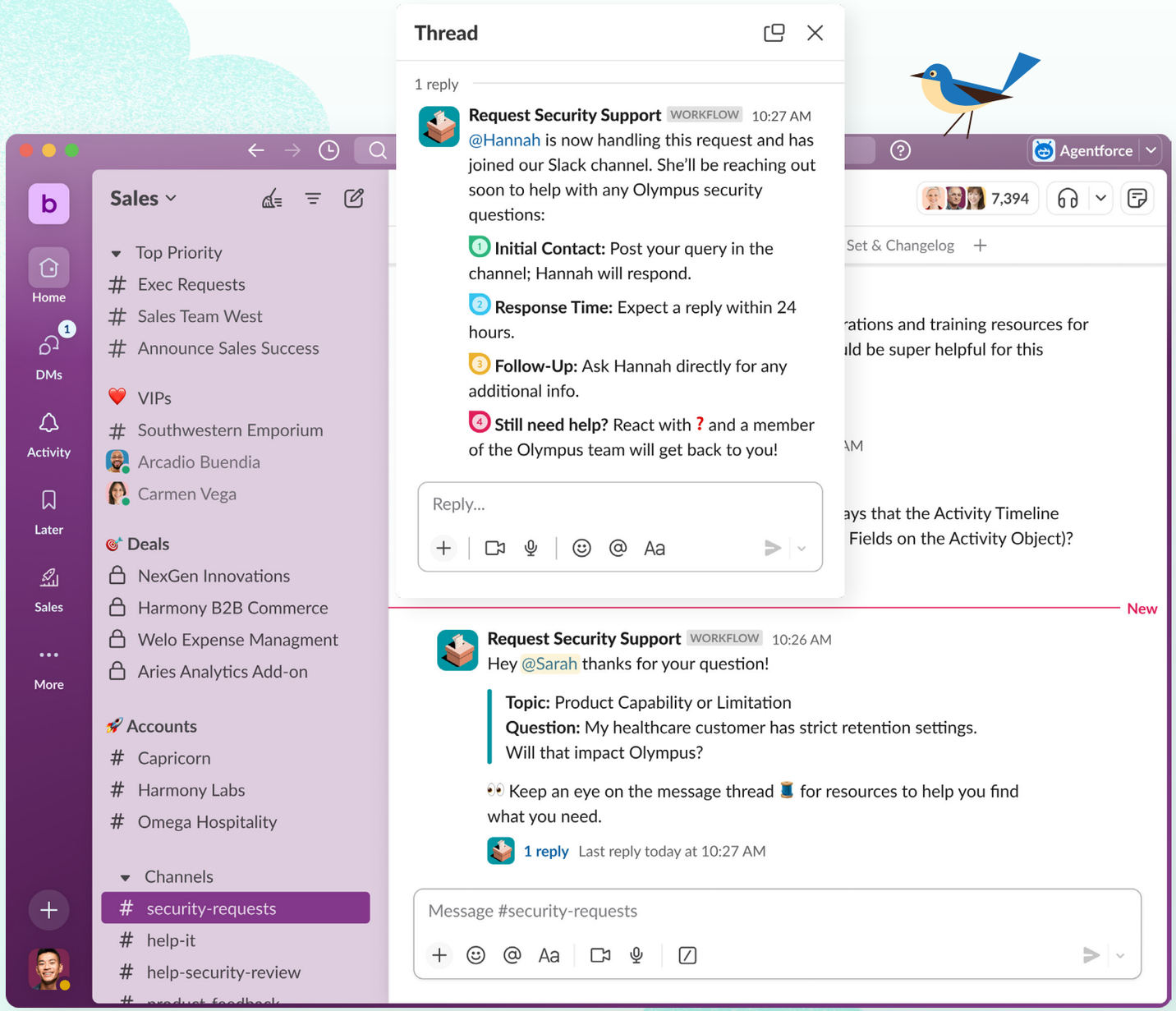




Automate busywork so reps can focus on high-value tasks

Sales reps are under pressure to close deals while building the foundation of customer relationships. As we've established, tasks like updating customer records and chasing down experts for deal support or approvals take time and resources away from the top priority – selling. Salesforce found that sales reps spend just 30% of their time on selling.

Sales teams can get more done faster when they use no-code workflows that let anyone in Slack automate processes through user-friendly steps. With Workflow Builder, your teams can create custom automations in their channels that help with administrative tasks. Sales teams can use a workflow for approvals by bringing together the right people, steps, documents, and processes to streamline special pricing requests, for instance. They can also use them for support or marketing requests, onboarding new employees, and reminders to follow up with leads or contacts at specific intervals.



Workflows are easy to set up, especially when you use Slack AI to create a workflow with a conversational prompt, such as "create a reminder to ask my team for deal lost, deal won, and new deal updates every Monday at 9 a.m." Having these updates in channel will save you and your team the time it would take to meet or send communications back and forth in an email.

Your team members can also embed **their essential apps** in workflows, which eliminates the need to duplicate information in multiple tools and manage various logins. By using **connectors**, teams can build workflows to submit a contract for approval using DocuSign or have Salesforce data entered into Google Sheets. The possibilities are endless.

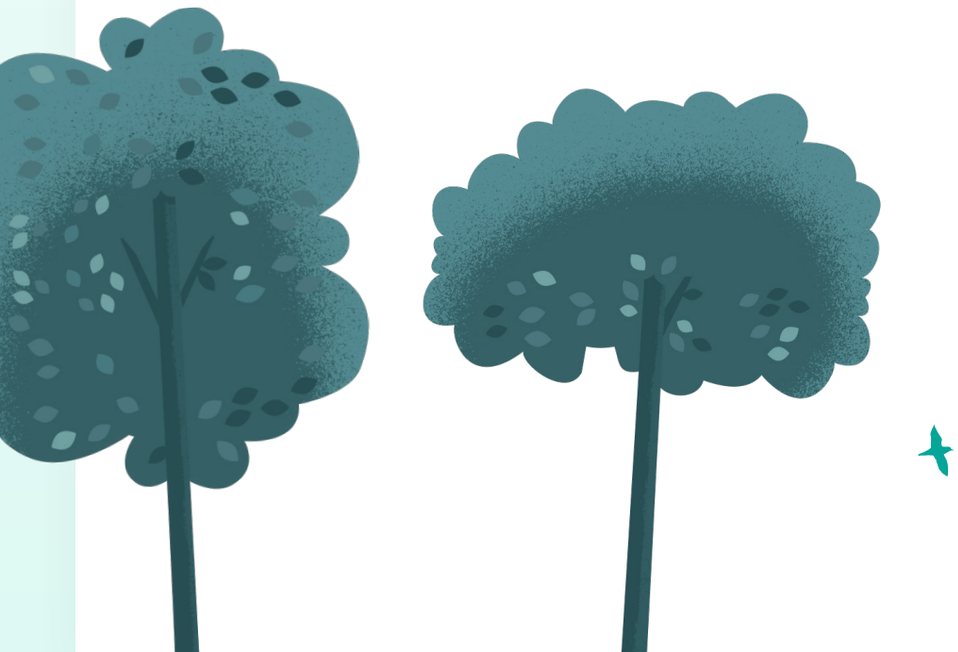
One customer that has used Slack's automations to shift its operations into high gear is **IBM**. Employees at the technology enterprise have built more than 10,000 workflows and apps and use them to streamline onboarding. The new hires team evaluates the best practices of IBM's top performers, and then designs intelligent workflows to train new employees in those relevant roles.

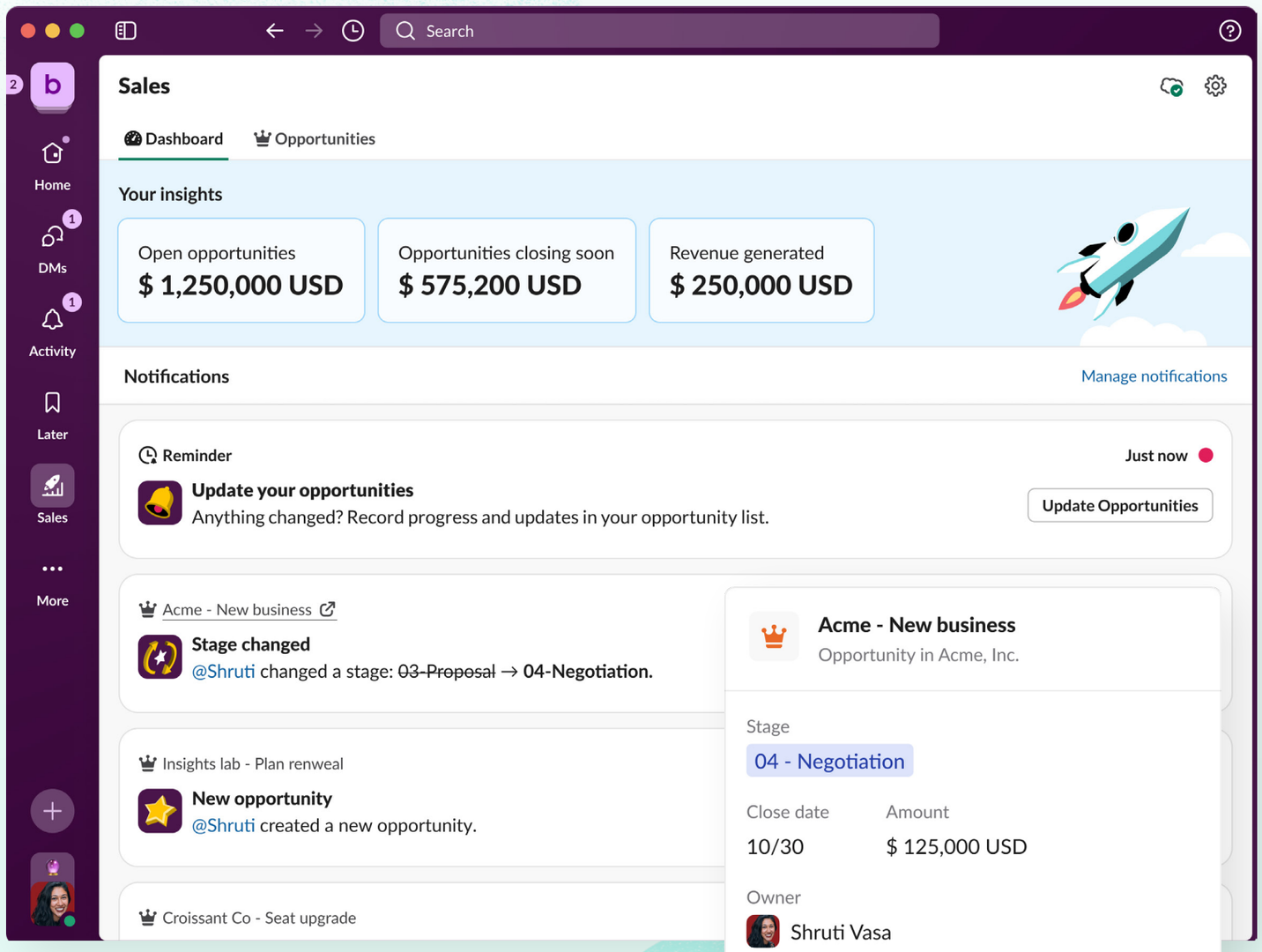
IBM infuses these workflows with its advanced artificial intelligence system, **watsonx.ai**, which analyzes large amounts of data to deliver industry-specific insights. More than mere task automation, these workflows provide contextual, performance-based guidance to set new hires up for success.



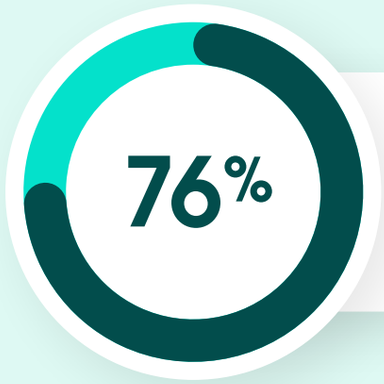
Improve how you manage your book of business with Slack Sales Elevate

We have yet to meet a sales professional who has ever said they enjoy toggling between multiple apps to manage their book of business. Slack Sales Elevate takes the work out of trying to stay on top of everything by helping sales reps, managers, and leaders get a holistic, real-time view into their business. Teams can speed up deal movements in Slack, where they're already having selling conversations.





Here's how Sales Elevate works: Everyone on the sales team can start the day in their own **sales home**, a personalized and complete view of key metrics, account updates, and opportunities in Slack. Whether on the road or running from meeting to meeting, Sales Elevate's full mobile experience makes it effortless for your team to stay on top of managing and updating data on the go. Your reps can easily log activities, post meeting notes, and access and manage multiple opportunities from anywhere. According to our internal data:



of Sales Elevate users said it made them more productive



of Sales Elevate users spent less time on CRM administration

In sales home, reps receive instant deal alerts and intelligent signals on deal movements that prompt actions – such as guiding a rep that it's time to create a mutual close plan and providing a document they can use – to keep the entire team up to speed on deal notifications. If a notification requires reps to take action on a specific account, they can jump into their customer's dedicated Salesforce channel to collaborate.

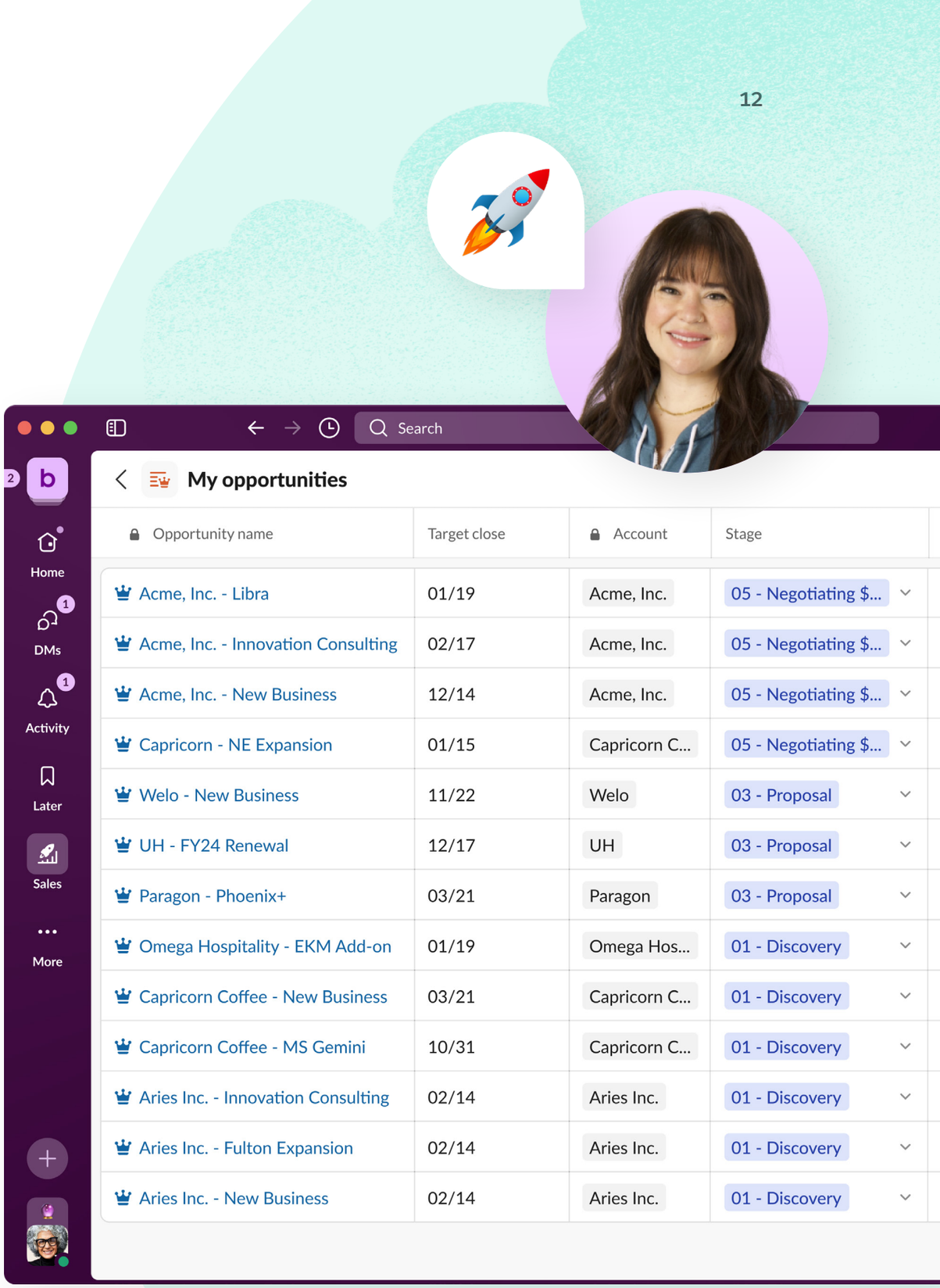
To scale and standardize your team's winning strategies, your team can use **sales templates** with built-in automation. Sales templates are out-of-the-box solutions you can modify based on what works best for your team so you can drive repeatable success. Say your team wants to spin up a channel dedicated to a new account. In one click, your reps can use sales templates to create a structured channel with consistent formatting, pre-created workflows that pull in your relevant Salesforce data, and pre-filled details for lists and canvases that can be used for everything from creating mutual close plans to executive briefs. The best part about working from sales templates is they are customizable and centralized right where you're having account conversations, removing the need to use another tool.

Slack Sales Elevate helps leaders drive more wins

We've designed Slack Sales Elevate to help sales leaders support and scale successful teams. In your sales home, **pipeline view** gives you a single snapshot of your team's Sales Cloud opportunities. Say you're a manager needing to forecast which deals have a propensity to close. You can use **deal filters** to pull up all the deals from the quarter and then go deeper into the data, choosing which deals you might need to focus on to make sure they close.

When reps work in Sales Elevate, sales leaders can better help their teams with blockers that typically slow deals down because they get a transparent, real-time view of business performance. Here's how:

1. Leaders can stay on top of their team's performance and the most important deals of the quarter wherever they work with automated notifications available on desktop and mobile.
2. Leaders can forecast with confidence when they configure daily or even weekly summary notifications of opportunities that let them know which deals have been won, lost, pushed out, pulled in, or compressed in a single list view. They can then dig into account record details to get a comprehensive understanding of what's happening.
3. Leaders can coach their teams more efficiently in Salesforce channels by getting the context they need from sales conversations around the customer. There's no need to set up a meeting or to log in to multiple applications.



Boosting global sales and improving visibility

Supplying the world's largest continuous source of semiconductors, **Rochester Electronics** has tapped into the power of Slack and Salesforce to transform its sales operations. "With Slack Sales Elevate, our sales teams can stay connected and updated on deal activity while on the move, which has significantly improved our responsiveness to customer needs," said Rochester's Executive Vice President Colin Strother.

To help increase engagement and speed up customer response times, the global company's sales teams use Sales Elevate's automatic alerts and personalized reminders. With immediate access to key metrics, reps can efficiently build quotes and make informed decisions with cross-functional teams. Sales reps, managers, and leaders all stay updated on deal movements, team wins, and pipeline changes as they happen. By improving visibility from any device, team members are empowered to anticipate and act on opportunities.



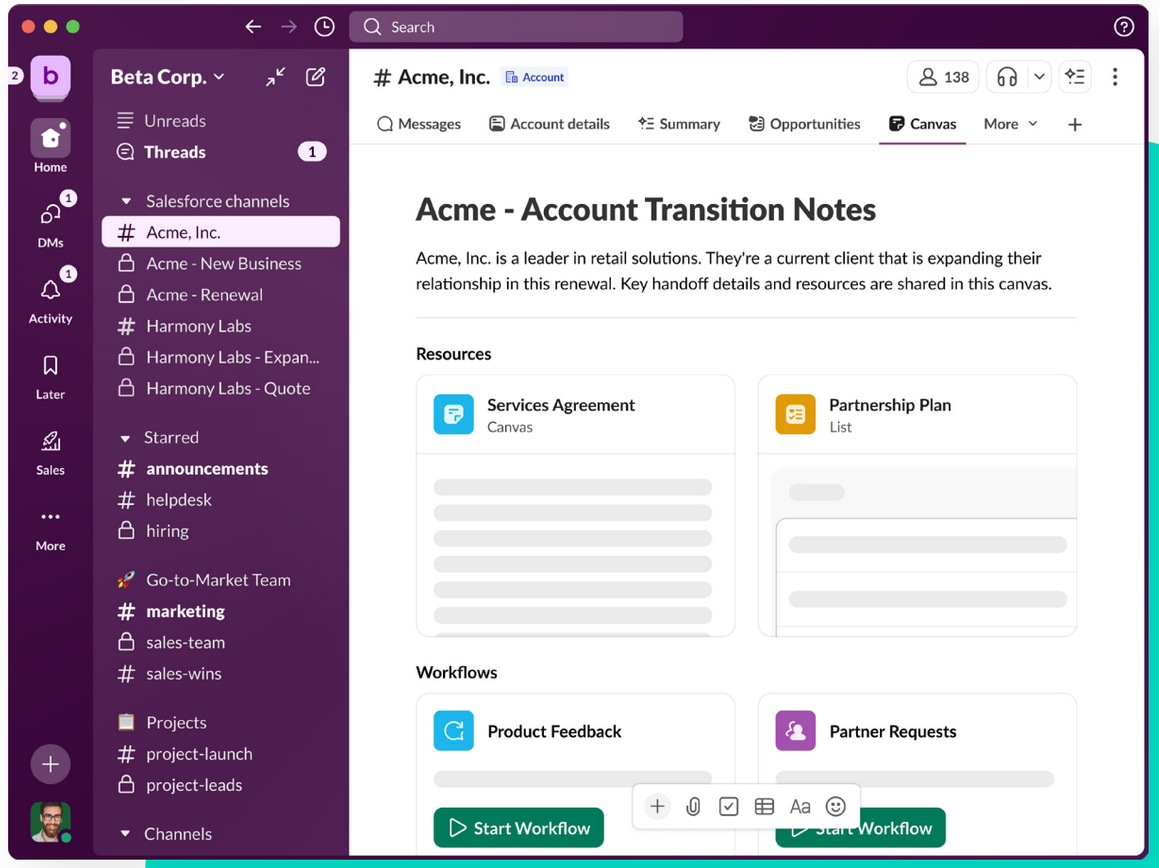
Colin Strother
Executive Vice President, Rochester Electronics

"Sales Elevate's proactive deal notifications ensure that our team stays on top of important deal updates, helping us close deals faster and more efficiently."

Selling together with Slack's features

Whether you're assembling partners and customers for real-time collaboration or designing a pitch deck asynchronously, Slack has you covered with some powerful features:

- **Agentforce in Slack: Agentforce** is Salesforce's new collection of AI agents across Customer 360 apps that helps organizations serve customers better. Agentforce agents work side-by-side with everyone on your team to bring together data, AI, and action. Coming in early 2025, Agentforce in Slack will help sales teams execute actions and deliver insights with varying degrees of autonomy to accelerate deals. Agentforce in Slack can work with your sales teams to manage leads, research accounts, maximize pipeline, scale coaching, generate forecasts, and more.
- **Canvas:** Account execs can record ideas and action plans in a **collaborative document** that lives on after the call is over. Plus, other teammates who may have missed the meeting can view and add to the canvas as needed.
- **Clips:** Send quick voice notes, videos, or screen recordings for colleagues to view asynchronously whenever they're back online.
- **Huddles:** Quickly hop into audio or video calls in any channel or message to problem-solve in a few minutes. Slack AI will take notes for you so you can stay in the moment.
- **Lists:** Reps can manage, track, and triage their work directly in Slack, without interrupting the flow of communication.
- **Slack AI:** Get caught up instantly with summaries of channels and threads, find things quickly in your workspace by asking questions in your own words, and declutter your day by scheduling a daily recap to receive highlights from your most important channels.
- **Templates:** Templates help teams work faster on all types of work, including managing projects and triaging help requests with pre-configured channels, canvases, lists, and workflows based on your business problem.
- **Workflow Builder:** Automate reminders, approvals, and other administrative work by creating a no-code workflow. Now you can use Slack AI to use conversational prompts to generate workflows for you.

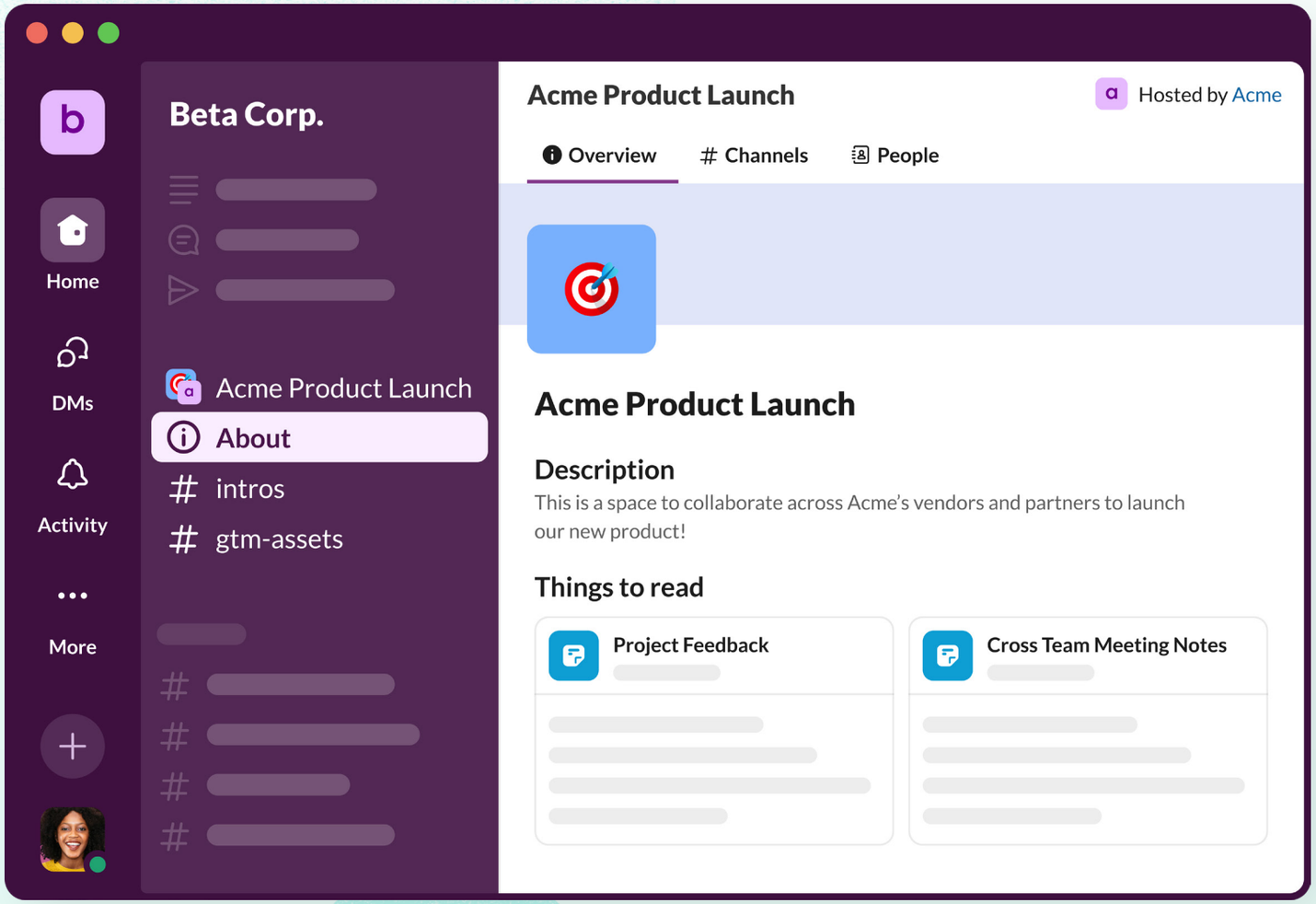


Forge deep relationships with customers, prospects, and partners

In sales, the gold standard of a deep customer relationship used to be communicating with that customer over text. Now it's getting them into a Slack Connect channel. Here, you can securely communicate with customers and other external partners directly in your workspace. Plus, all the features Slack reps use internally extend to Slack Connect.

Imagine sharing a quick update with a client using a clip. You can maintain all the personality of a video meeting, but allow the customer to absorb the information at a time that works best for them. In fact, we've found that Slack Connect users have 60%* faster customer response times compared with email.

*Claims and figures based on specific teams using Slack Connect at their companies.



Provide a better collaborative experience with your customers

One of our Slack Connect customers is **OpenAI**, which has over 170 Slack Connect channels and has sent over 5 million messages since becoming a Slack customer in 2018. Collaborating within channels empowers OpenAI to find faster, more accurate solutions for customer needs.

"Slack Connect is a huge part of our customer experience," said Anna Tifft, an account manager at OpenAI. "What I love about working in Slack is it removes me as a bottle-neck. It gives me the ability to bring in my colleagues when a customer has a question that is outside of my purview, or I think someone else can answer more effectively or more quickly than I can."



Nurture partner sales relationships with Slack Connect

Working with indirect sales channels – such as third-party retailers, resellers, independent sales-people, and service providers – has historically helped companies win deals without adding headcount. Research shows that **84% of sales pros say partner selling has a bigger impact on revenue than a year ago**.

Today's challenges offer organizations an opportunity to re-evaluate and optimize their channel sales strategies. **Slack Connect** makes it easier to amplify partner engagement, support them throughout the sales cycle, and build scalable relationships.

Your sales team can work securely with your partner ecosystem and get visibility into the pipeline, accelerate lead pass and follow-up, and provide personalized support by using Slack Connect. Each organization joins from its own Slack workspace. From there, everyone can share files, loop in colleagues, and quickly make decisions, just like they do with internal teams.

Having fluid conversations in the same Slack channels allows teammates from different organizations to develop solutions together and build true relationships – as if they were part of the same organization. Plus, Slack provides **enterprise-grade security features and compliance standards** with Slack Connect, reducing your team's exposure to email vulnerabilities.

Reach and exceed your sales potential with Slack

Prospects and customers want to mean more to organizations than just dollar signs. You can demonstrate your value to customers by making it easier to anticipate and act on any needs that extend beyond the initial deal. But if you want to deliver an excellent experience while also staying on top of your pipeline, you can't afford to rely on email chains and CRMs alone.

Give your reps more time to focus on their customers' needs by creating a 360-degree view of their data. Do this by connecting your CRM and revenue intelligence tools to Slack, where your reps and agents can access customer activity and insights, and automate key communications at scale.

By taking information out of antiquated silos and processes and putting it into an AI-powered work operating system, Slack enables your team to close deals faster and deliver a better customer experience. In fact, sales teams that used Slack reported they **saved more than 28 minutes per user on daily tasks**. That added up to a benefit of $1.9 million over three years. When your team is empowered to do its best work, everybody wins.

Source: "The Total Economic Impact™ of Slack for Sales Teams," a commissioned study conducted by Forrester Consulting on behalf of Slack, November 2023. Results are for a composite organization.

Want to take your sales game to the next level?

Get guidance, best practices, and resources by joining the Salesblazer community.

Join the community

In addition, learn more about how Slack can supercharge your sales cycle by contacting our sales team.

Contact our sales team





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