# A [your company name] Slack Guide

Slack is a business messaging application that facilitates access to relevant information for its users. It promotes collaboration and unification among team members, improving the way organizations communicate.

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[This is the table of contents containing the topics and critical rules of using Slack. Feel free to modify it based on your needs and your guidelines]

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Slack is a great communication tool, especially for a hybrid or distributed company. But it is not always the best mode of communication. Sometimes an email, call, meeting may be better suited. Consider what you are sending or discussing to decide whether Slack is your best option.

If someone sends you a Slack message and you believe it is not the right place to be discussing the matter at hand, you should let the sender know and suggest an alternative. You are encouraged to do that. *“Hi! It sounds like this would be better discussed on a call, I’m free now if you are?”*

Some teams also have established norms, these should be explained to you when you’re onboarded but if anything is unclear it is always OK to ask. It’s important you’re not missing out on important information because you didn’t know to join a certain channel or understand a team norm about using Slack.

Slack DMs should not be used for getting formal approvals (e.g. promotions) or anything that requires an audit trail. For approvals use email instead.

## **Slack Channel Naming conventions**

Here are some common naming conventions [we suggest you use] that should help you search for the channel you’re looking for.

| **Naming Convention** | **Use** |
| --- | --- |
| #ask-{team name}  | Somewhere to ask a team a question.  |
| #{team name}-daily | A team’s daily updates (check in/outs) are posted in these channels. You can join the channel to view the updates if that team’s work is relevant to you. These channels are not used for general team conversation.  |
| #{team\_name} | A channel for members of that team to collaborate together.  |
| #{location\_name} | We use these channels like #newyork to communicate with a specific group of employees, typically office updates.  |

**Be mindful of channel bloat.** When creating a channel ask yourself whether a DM group would be more appropriate? Channels tend to live for a long time with people leaving/joining, if your need is more temporary a DM group may be more suitable.

## **Setting up Slack**

#### **Complete your profile**

Complete your profile with your full name, job title, email, phone (where appropriate).

#### **Setup your notifications preferences**

You can click on your profile name on the top right corner of the slack app and go to preferences.

There you can choose when to get notifications on your phone or PC/MacBook. If people see you active in Slack they will assume you are able to talk. You can also set your notification schedule so you don’t receive notifications outside your working hours:

#### **Integrate Google Calendar**

Integrating GCal will automatically update your status in Slack so people know, for example, when you’re in a meeting.

## **Day-to-day use**

#### **If you want time to focus; turn off notifications**

You can set a time period for your update, it’s a pro move to use that so you don’t accidentally turn off notifications for the rest of your day.

You can see when someone has paused their notifications:

If something is important and urgent you can choose to “Notify anyway?” to override their paused notifications:

#### **Turn notifications off for channels where you don’t need real time notifications**

This is particularly useful in very busy channels especially if you are more of an observer than an active participant. (If you only ever observe, consider whether leaving the channel would be better for you). You can also choose to mute a channel to further reduce its presence.

#### **Leave channels you are not engaging with**

Over time it’s easy to join 10s of channels. On their own each one probably doesn't distract you much. But overtime the combined distraction of those 10s will make a difference. If you don’t need to be in it, leave; there are plenty of other ways for someone to contact you and you can always re-join.

Slack will periodically notify you of channels you rarely use. It’s a good practise to review the suggestions and leave those you’re not engaging with:

#### **Keep your status up to date**

If you have integrated your Google Calendar with Slack your status will automatically be updated when you’re in a meeting so people know you’re busy. But there may be times you want to manually update your status.

It is often helpful to add context to your status, for example when going on PTO you can add the date you will return:

#### **Sections keep DMs organized**

Sections make it quick and easy to get to the DM you use the most, often your team

#### **Become a Slack Pro**

Using keyboard shortcuts to navigate in Slack will save you a lot of time. For example jumping to a specific conversation or going back/forward are great examples.

## **Messaging Guidelines**

#### **[Feel free to modify or add messaging rules and guidelines for your personnel here].**

#### **Use @channel and @here with extreme caution**

**They should only be used for important, urgent messages.** If you use @channel or @here make sure your message contains enough information that someone knows if they should respond or if they can ignore it. For example, “@channel please look at the message above” is not helpful.

When you put @here in your message, all users that are members of the channel you are posting and are active will get a notification.

When you put @channel in your message, all users that are members of the channel you are posting will get a notification no matter if they set up do-not-disturb or even mute the channel. People that are asleep will wake up, people will check your message during their meetings.

#### **Don’t expect a response straight away**

Slack is a great way to talk directly to people in a more direct way but people might be doing something that can not be left in the middle or have another very important talk.

If you need to communicate with someone urgently you can send them a message explaining exactly that but if you don’t see a response right away there is no point in sending more messages. There are other ways to communicate with a coworker if something is urgent.

#### **Use threads on Channels and group conversations**

Threads help keep track of conversations and most importantly replies in threads do not notify all the channel members at all. Only the parent post creator will be notified and after that only the people who have posted on the thread will get notifications by default.

#### **Don’t just say “Hello”**

Do not send someone a DM saying “Hello” and leave it there. Ask the question you would like answered right away.

#### **Acknowledge messages with reactions**

Instead of sending a one word answer like “OK”, “Cool” or “thank you” consider using an emoji like a thumbs up. That will help reduce the disruption (no notification or unread notice for the recipient) but at the same time maintains the courtesy. Using keyboardshortcuts for emojis can also save time

#### **Avoid sending** multiple short messages that should be one message. The individual notifications are a nuisance for the recipient and it's difficult to read.

#### **Respect someone’s status**

If they say Do Not Disturb, leave them be if you can. Consider sending an email instead. If it’s urgent and important, go ahead and click “Notify anyway?” so they receive a notification.

#### **Consider scheduling your message to send later**

Whilst most people will have notifications paused outside their working hours, you can also help by using Slack’s option to schedule your message to send later. Slack will show you the local time for the person you are messaging.

## **Commonly used Emojis for Statuses & Reactions**

If you are ever uncertain about the intended meaning of someone’s reaction to your message, ask for clarification.

Hovering over someone's status emoji may provide some additional context:

| **Common Statuses** | **Meaning** |
| --- | --- |
| 🌴 | I’m on PTO |
| ⛔ and 🚫 | I’m busy, please don’t disturb (or on PTO with Google Calendar / Slack integration) |
| 🗓 | I’m in a meeting |
| 🏢 | I’m in the office |
| ***🥣*** | I’m having lunch |
| :face_with_thermometer: | I’m out sick |

| **Common Reaction Emojis** | **Meaning** |
| --- | --- |
| 👀 | I’m looking into your message/question |
| 🙏 | Thank you |
| ✅ | Go ahead / agreed/ approved.  |

## **Some channels you might be interested in**[Here, you can add your public channels, specify the topics, and provide useful information].

| **Channel** | **What is it?** |
| --- | --- |
| #channel\_name | What is the purpose of this channel? How can someone join it? |
| #channel\_name\_2 | … |
| #channel\_name\_3 | … |