

LEARNING MADE EASY



Slack

for
dummies[®]
A Wiley Brand



Create workspaces,
channels, and threads

Improve employee
productivity and collaboration

Maintain connection while
working outside the office

Phil Simon

Award-winning author of *The Age of
the Platform*



foreword by **Cal Henderson**

Cofounder and CTO of Slack Technologies



Slack™

by Phil Simon

Award-winning author of *The Age of the Platform*

FOREWORD BY Cal Henderson

Founder and CTO of Slack Technologies

for
dummies®
A Wiley Brand

Slack™ For Dummies®

Published by: **John Wiley & Sons, Inc.**, 111 River Street, Hoboken, NJ 07030-5774, www.wiley.com

Copyright © 2020 by John Wiley & Sons, Inc., Hoboken, New Jersey

Published simultaneously in Canada

No part of this publication may be reproduced, stored in a retrieval system or transmitted in any form or by any means, electronic, mechanical, photocopying, recording, scanning or otherwise, except as permitted under Sections 107 or 108 of the 1976 United States Copyright Act, without the prior written permission of the Publisher. Requests to the Publisher for permission should be addressed to the Permissions Department, John Wiley & Sons, Inc., 111 River Street, Hoboken, NJ 07030, (201) 748-6011, fax (201) 748-6008, or online at <http://www.wiley.com/go/permissions>.

Trademarks: Wiley, For Dummies, the Dummies Man logo, Dummies.com, Making Everything Easier, and related trade dress are trademarks or registered trademarks of John Wiley & Sons, Inc. and may not be used without written permission. Slack is a trademark of Slack Technologies, Inc. All other trademarks are the property of their respective owners. John Wiley & Sons, Inc. is not associated with any product or vendor mentioned in this book.

LIMIT OF LIABILITY/DISCLAIMER OF WARRANTY: THE PUBLISHER AND THE AUTHOR MAKE NO REPRESENTATIONS OR WARRANTIES WITH RESPECT TO THE ACCURACY OR COMPLETENESS OF THE CONTENTS OF THIS WORK AND SPECIFICALLY DISCLAIM ALL WARRANTIES, INCLUDING WITHOUT LIMITATION WARRANTIES OF FITNESS FOR A PARTICULAR PURPOSE. NO WARRANTY MAY BE CREATED OR EXTENDED BY SALES OR PROMOTIONAL MATERIALS. THE ADVICE AND STRATEGIES CONTAINED HEREIN MAY NOT BE SUITABLE FOR EVERY SITUATION. THIS WORK IS SOLD WITH THE UNDERSTANDING THAT THE PUBLISHER IS NOT ENGAGED IN RENDERING LEGAL, ACCOUNTING, OR OTHER PROFESSIONAL SERVICES. IF PROFESSIONAL ASSISTANCE IS REQUIRED, THE SERVICES OF A COMPETENT PROFESSIONAL PERSON SHOULD BE SOUGHT. NEITHER THE PUBLISHER NOR THE AUTHOR SHALL BE LIABLE FOR DAMAGES ARISING HEREFROM. THE FACT THAT AN ORGANIZATION OR WEBSITE IS REFERRED TO IN THIS WORK AS A CITATION AND/OR A POTENTIAL SOURCE OF FURTHER INFORMATION DOES NOT MEAN THAT THE AUTHOR OR THE PUBLISHER ENDORSES THE INFORMATION THE ORGANIZATION OR WEBSITE MAY PROVIDE OR RECOMMENDATIONS IT MAY MAKE. FURTHER, READERS SHOULD BE AWARE THAT INTERNET WEBSITES LISTED IN THIS WORK MAY HAVE CHANGED OR DISAPPEARED BETWEEN WHEN THIS WORK WAS WRITTEN AND WHEN IT IS READ.

For general information on our other products and services, please contact our Customer Care Department within the U.S. at 877-762-2974, outside the U.S. at 317-572-3993, or fax 317-572-4002. For technical support, please visit <https://hub.wiley.com/community/support/dummies>.

Wiley publishes in a variety of print and electronic formats and by print-on-demand. Some material included with standard print versions of this book may not be included in e-books or in print-on-demand. If this book refers to media such as a CD or DVD that is not included in the version you purchased, you may download this material at <http://booksupport.wiley.com>. For more information about Wiley products, visit www.wiley.com.

Library of Congress Control Number: 2020937263

ISBN 978-1-119-66950-0 (pbk); ISBN 978-1-119-66952-4 (ePDF); ISBN 978-1-119-66951-7 (epub)

Manufactured in the United States of America

10 9 8 7 6 5 4 3 2 1

Contents at a Glance

| | |
|---|------|
| Foreword | xiii |
| Introduction | 1 |
| Part 1: Working Smarter and Better with Slack | 7 |
| CHAPTER 1: Why Slack Exists | 9 |
| CHAPTER 2: Getting Started with Slack | 29 |
| Part 2: Communicating Without Chaos | 57 |
| CHAPTER 3: Targeting Your Communication with Slack Channels | 59 |
| CHAPTER 4: The Wonderful World of Slack Messages | 91 |
| CHAPTER 5: Staying Informed with Notifications, Statuses, and Feeds | 119 |
| Part 3: Becoming a Slack Power User | 141 |
| CHAPTER 6: Going Deeper into Slack’s Functionality | 143 |
| CHAPTER 7: Finding What You Need with Slack’s Powerful Search Techniques ... | 159 |
| CHAPTER 8: Personalizing Slack | 173 |
| CHAPTER 9: Keeping It Safe: Reviewing Slack’s Security and Privacy Settings | 193 |
| Part 4: Extending Slack’s Native Functionality | 211 |
| CHAPTER 10: Making Slack Hum with Robust Third-Party Apps | 213 |
| CHAPTER 11: Analyzing, Importing, Exporting, and Updating Slack User Data | 245 |
| CHAPTER 12: Integrating Slack with Popular Enterprise Systems | 263 |
| Part 5: Successfully Introducing Slack in the Workplace | 275 |
| CHAPTER 13: The Elements of Persuasion: Slack-Adoption Strategies | 277 |
| CHAPTER 14: The Inherent Risks of Deploying Slack | 297 |
| CHAPTER 15: The Future of Slack: We’re Just Getting Started | 315 |
| Part 6: The Part of Tens | 327 |
| CHAPTER 16: Ten Great Slack Tips | 329 |
| CHAPTER 17: Ten or So Common Slack Myths | 333 |
| CHAPTER 18: The Top Ten or So Slack Resources | 339 |
| Index | 347 |

Table of Contents

| | |
|--|------|
| FOREWORD | xiii |
| INTRODUCTION | 1 |
| About This Book | 2 |
| Foolish Assumptions | 2 |
| Icons Used in This Book | 4 |
| Beyond the Book | 5 |
| Where to Go from Here | 5 |
| PART 1: WORKING SMARTER AND BETTER WITH SLACK | 7 |
| CHAPTER 1: Why Slack Exists | 9 |
| Introducing Slack | 9 |
| Meeting Slack’s Users and Customers | 13 |
| Understanding Why Slack Exists | 14 |
| Email: The blessing and all-too-frequent curse | 15 |
| Trapped institutional knowledge | 16 |
| Employees often can’t find what they want — quickly or even at all | 17 |
| What Slack Specifically Does | 18 |
| Employer benefits | 18 |
| Employee benefits | 23 |
| CHAPTER 2: Getting Started with Slack | 29 |
| Reviewing Slack’s Different Versions | 29 |
| Free plan | 30 |
| Standard plan | 30 |
| Plus plan | 31 |
| Enterprise Grid | 31 |
| Changing your Slack plan | 31 |
| Describing Slack’s cost structure | 33 |
| Beginning Your Slack Journey with the Workspace | 35 |
| Creating a new Slack workspace | 36 |
| Signing in to an existing Slack workspace | 37 |
| Accessing your new workspace | 40 |
| Using the Slack desktop app | 40 |
| Introducing the Slack user interface | 42 |
| Summarizing Slack’s Different Roles and Permissions | 44 |
| Administrative roles | 44 |
| Non-administrative roles | 46 |

| | |
|--|-----------|
| Managing member roles | 47 |
| Enterprise Grid roles and permissions. | 51 |
| Starting Your New Workspace Off on the Right Foot. | 52 |
| Expanding your existing workspace | 52 |
| Configuring your member profile and key account settings. | 54 |
| PART 2: COMMUNICATING WITHOUT CHAOS | 57 |
| CHAPTER 3: Targeting Your Communication with Slack Channels | 59 |
| Introducing Slack Channels | 60 |
| Exploring the Different Types of Slack Channels | 61 |
| Public channels | 62 |
| Private channels | 63 |
| Multi-workspace channels | 65 |
| Shared channels | 67 |
| Creating Public and Private Channels | 69 |
| Creating your first public channel. | 70 |
| Building an intelligent channel structure. | 73 |
| Viewing basic channel information. | 75 |
| Performing Channel Actions | 76 |
| Group actions. | 77 |
| Individual actions. | 81 |
| Adding Members to Existing Channels. | 83 |
| Manual additions. | 83 |
| Default workplace channels. | 85 |
| Exploring Existing Public Channels | 85 |
| Communicating via Slack Channels | 87 |
| Posting simple channel messages | 88 |
| Understanding channel etiquette | 89 |
| CHAPTER 4: The Wonderful World of Slack Messages | 91 |
| Understanding Slack Messages. | 92 |
| Sending a Message | 92 |
| Performing basic message actions | 94 |
| Formatting your messages. | 96 |
| Finding people in your workspace | 98 |
| Editing messages. | 100 |
| Deleting messages | 101 |
| Muting conversations | 101 |
| Setting message-specific reminders. | 102 |
| Saving DMs and channel messages | 102 |
| Pinning DMs to conversations. | 103 |

| | |
|--|------------|
| Creating special types of messages | 104 |
| Converting group DMs into private channels | 108 |
| Using threads to create topic-specific containers. | 109 |
| Sharing in Slack | 111 |
| Sharing files | 111 |
| Sharing messages | 114 |
| Comparing Email and Slack | 116 |
| Forwarding Email to Slack | 117 |
| Communicating Outside of Slack | 117 |
| CHAPTER 5: Staying Informed with Notifications, Statuses, and Feeds | 119 |
| Getting Your Arms around Notifications | 120 |
| Managing Slack notifications | 120 |
| Reviewing the different types of Slack notifications. | 122 |
| Letting Others Know Your Availability | 130 |
| Setting your status | 131 |
| Viewing your colleagues' statuses. | 132 |
| Editing your status. | 133 |
| Clearing your status | 133 |
| Setting yourself to away/active | 133 |
| Unplugging with Do Not Disturb mode | 134 |
| Configuring Device-Specific Notifications | 137 |
| Enabling notifications on mobile devices. | 137 |
| Understanding when settings collide | 137 |
| Finding Other Ways to Stay Current. | 138 |
| Receiving emails on recent activity. | 138 |
| Viewing mentions and reactions. | 139 |
| PART 3: BECOMING A SLACK POWER USER | 141 |
| CHAPTER 6: Going Deeper into Slack's Functionality | 143 |
| Making Calls in Slack. | 143 |
| Types of calls | 144 |
| Calls and security. | 148 |
| Sharing Your Screen in Slack | 149 |
| Presenting and viewing. | 149 |
| Drawing. | 150 |
| Saving Even More Time in Slack | 150 |
| Invoking keyboard shortcuts. | 151 |
| Using commands. | 152 |
| Managing Your Life with Reminders. | 153 |

| | | |
|-------------------|---|------------|
| | Saving Items | 155 |
| | Saving files | 155 |
| | Saving messages | 155 |
| | Quickly accessing your saved items | 155 |
| | Creating User Groups | 156 |
| CHAPTER 7: | Finding What You Need with Slack’s Powerful Search Techniques | 159 |
| | Searching for Better Search Methods | 160 |
| | Performing Searches in Slack | 161 |
| | Searching by workspace members | 163 |
| | Restricting searches to specific date ranges | 164 |
| | Using negative keywords | 165 |
| | Referencing multiple keywords | 166 |
| | Restricting search results even more | 167 |
| | Searching by user reactions | 167 |
| | Searching by wildcards | 168 |
| | Searching by fuzziness | 169 |
| | Searching by additional modifiers | 170 |
| | Getting the Most Out of Search in Slack | 170 |
| | Start small | 170 |
| | Embrace modifiers | 171 |
| | Remember that results change over time | 172 |
| | Be patient | 172 |
| CHAPTER 8: | Personalizing Slack | 173 |
| | Getting to Know Your Slack Options | 174 |
| | Configuring global workspace settings | 175 |
| | Personalizing your Slack options | 179 |
| | Customizing User Profiles | 185 |
| | Creating custom fields | 186 |
| | Populating custom fields | 187 |
| | Organizing Your Sidebar | 189 |
| | Using sections | 189 |
| | Sorting channels | 191 |
| CHAPTER 9: | Keeping It Safe: Reviewing Slack’s Security and Privacy Settings | 193 |
| | Getting Acquainted with Slack Security | 194 |
| | Security and Slack’s Evolution | 194 |
| | Configuring Slack’s Access and Security Settings | 195 |
| | Confirming sign-ins via email | 195 |
| | Resetting your password | 195 |
| | Viewing access logs | 197 |

| | |
|---|-----|
| Enabling two-factor authentication | 198 |
| Additional security features | 200 |
| Enhancing Security via Slack Enterprise Grid | 201 |
| Examining Privacy in Slack | 202 |
| Message encryption | 202 |
| What data Workspace Admins can Access | 204 |
| Workspace message-retention settings | 204 |
| File-retention settings | 207 |
| Understanding Slack’s Tricky Regulatory Environment | 208 |
| Restrictions on data and file retention | 208 |
| Data residency | 208 |

PART 4: EXTENDING SLACK’S NATIVE FUNCTIONALITY 211

CHAPTER 10: Making Slack Hum with Robust Third-Party Apps 213

| | |
|---|------------|
| Understanding How Slack Has Embraced Platform Thinking | 214 |
| Comparing Public and Private Apps | 215 |
| Public apps | 215 |
| Private apps and integrations | 215 |
| Enhancing Slack with Third-Party Apps | 216 |
| Looking at app costs | 216 |
| The Slack App Directory | 217 |
| Introducing Some Popular Slack Apps | 218 |
| Polling apps | 218 |
| File- and content-sharing apps | 220 |
| Scheduling apps | 221 |
| Productivity and project-management apps | 223 |
| IFTTT Slack applets | 224 |
| Video-calling apps | 225 |
| Email apps and integrations | 225 |
| Miscellaneous apps | 226 |
| Finding and Installing Apps | 227 |
| Browsing the Slack App Directory | 228 |
| Installing a Slack app in your workspace | 228 |
| Searching for specific apps | 230 |
| Experimenting with new apps | 230 |
| Managing Apps and App Permissions | 231 |
| Approving specific apps | 231 |
| Regulating workspace apps | 232 |
| Viewing all your workspace apps | 236 |
| Enforcing your organization’s app policy | 236 |
| Removing apps from your workspace | 238 |

| | |
|--|------------|
| Disappearing apps | 239 |
| Disabling and re-enabling preserved apps | 239 |
| Viewing app activity logs | 240 |
| Using Workflow Builder | 241 |
| Creating workflows | 241 |
| Heeding workflow warnings | 244 |
| CHAPTER 11: Analyzing, Importing, Exporting, and Updating Slack User Data | 245 |
| Analyzing Workspace Data | 246 |
| Slack's analytics dashboard | 246 |
| Channel-specific analytics | 250 |
| Member analytics | 252 |
| Viewing Member Access Logs | 253 |
| Moving Data Around in Slack | 254 |
| Exporting data from Slack | 254 |
| Importing data into Slack | 258 |
| Consolidating Slack workspaces | 259 |
| Avoiding mistakes when migrating data | 261 |
| Performing Mass Updates to User Data | 262 |
| CHAPTER 12: Integrating Slack with Popular Enterprise Systems | 263 |
| A Brief Primer on Enterprise Systems | 264 |
| Back-office systems | 264 |
| Front-office systems | 265 |
| Slack and Current Enterprise Systems | 265 |
| Exploring current system integrations | 268 |
| Creating new system integrations | 270 |
| Looking forward | 274 |
| PART 5: SUCCESSFULLY INTRODUCING SLACK IN THE WORKPLACE | 275 |
| CHAPTER 13: The Elements of Persuasion: Slack-Adoption Strategies | 277 |
| A Brief Primer on Network Effects | 278 |
| Reviewing the Different Slack-Adoption Approaches | 279 |
| The bottom-up method | 279 |
| The top-down method | 280 |
| The middle-out method | 280 |
| Making Slack Stick at Work | 281 |
| Organization-level strategies | 281 |
| Strategies for handling difficult employees | 286 |

| | |
|--|-----|
| CHAPTER 14: The Inherent Risks of Deploying Slack | 297 |
| Identifying the Risks of Using Slack | 298 |
| Business risks | 298 |
| Technology and security risks | 304 |
| Listing Slack’s Environmental Challenges | 307 |
| Slack’s financial pressures | 308 |
| Stiff competition | 310 |
| Ongoing legal and privacy concerns | 311 |
| CHAPTER 15: The Future of Slack: We’re Just Getting Started | 315 |
| Increased Use of Automation and Bots | 316 |
| AI and machine learning make Slack smarter — much, much smarter | 317 |
| Slack begins to monitor employee morale and diagnose cultural issues | 318 |
| Tighter Integration with Popular Enterprise Systems | 319 |
| Better Dashboards and Analytics | 319 |
| A More Powerful Slack Work Graph | 320 |
| Continued Borrowing of Popular Features from Other Apps | 322 |
| Key Acquisitions and Partnerships | 326 |
| PART 6: THE PART OF TENS | 327 |
| CHAPTER 16: Ten Great Slack Tips | 329 |
| Respond Promptly to New Users’ Requests, Questions, and Feedback | 329 |
| Regularly View Slack Analytics | 330 |
| Tread Lightly with New Hires | 330 |
| Establish Slack as the Default Medium for Internal Communication | 330 |
| Emphasize Slack’s Carrots More Than Its Sticks | 331 |
| Keep an Eye Out for New Slack Apps | 331 |
| Tell Overly Exuberant Slack Members to Tone It Down | 331 |
| Publicize Your Status and Availability | 331 |
| Try Before You Buy | 332 |
| Know When to Turn Slack Off | 332 |
| CHAPTER 17: Ten or So Common Slack Myths | 333 |
| Slack Is Just Email 2.0 | 333 |
| Slack Decimates the Need for Email | 334 |
| All Organizations Configure Slack in a Uniform Way | 334 |
| Slack Obviates the Need for In-Person Communication | 335 |
| Slack Solves Every Conceivable Business-Communication Problem | 335 |
| Slack Is Too Expensive for Our Company | 335 |

| | |
|---|------------|
| Our Company Has Built a Tool That's Just as Good as Slack | 336 |
| Our Employees Don't Need Slack | 336 |
| Our Company Uses Slack and Nothing Else for Collaboration | 337 |
| You Can't Misuse Slack | 338 |
| CHAPTER 18: The Top Ten or So Slack Resources | 339 |
| Slack Online Support. | 340 |
| Contacting Slack. | 340 |
| Browsing the Slack support site | 340 |
| Opening cases or making suggestions within the Slack app. | 340 |
| Finding Slack tips | 340 |
| Submitting Slack feature requests | 341 |
| Other Online Resources | 341 |
| Official resources. | 341 |
| Unofficial resources | 342 |
| Developer resources. | 343 |
| In-Person Resources | 343 |
| Conferences | 343 |
| Meetups | 344 |
| In-person training | 345 |
| INDEX | 347 |

Foreword

My cofounders and I never could have imagined that our internal collaboration tool would eventually revolutionize workplace communications and change how people work. At that time, email was the default coordinating point for communications and information, but inside our company — which was split between New York City, San Francisco, and Vancouver — it was simply too slow. We wanted a better, quicker solution than email for working together and across great distances. So, like any group of engineers would, we set out to build one.

Designed to bring the tools you use and the people you work with every day into one place, Slack, we believe, is a better way of working together than email. Meaningful teamwork and engagement on Slack happens in channels, which you can read more about in Chapter 3. Channels and shared channels (between multiple organizations) represent a more efficient mechanism for workplace communication and are organized by team or projects, which helps facilitate relevant exchanges and productivity.

These channels quickly become rich, dense, searchable archives of information, giving users quick access to all the information they need in one centralized location. (You can find out more on the power of search in Slack in Chapter 7.) Slack is made even more powerful by integrating third-party apps to accomplish a range of tasks spanning all major categories of work, including project management, finance, design, customer support, and more. As you can read in Chapter 10, Slack has thousands of apps in its directory — all designed to make your workday more productive.

Even in its earliest iterations, we viewed Slack as more than a simple messaging tool. When we talk about Slack as a collaboration hub, we don't just mean people sending messages to one another, but more broadly, the work that is enabled across teams on a single platform. Slack started as a tool we built to answer our small company's needs, and it turns out those needs were pretty universal, from coffee roasters to healthcare offices to some of the world's largest financial services companies. If you're reading this book, it's likely you're in a similar situation.

I hope *Slack For Dummies* gives you strong foundational knowledge about what Slack can do to improve your workplace communications, and by reading it, you're able to pick up a few tips and tricks along the way. In the end, every business is made up of teams who are looking for a better way to work together. We're happy and grateful to be a part of your journey.

— Cal Henderson, cofounder and Chief Technology Officer, Slack Technologies, Inc.

Introduction

Not that long ago, the world's most successful organizations relied upon typewriters, landlines, inter-office memos, and secretaries. Email and even fax machines didn't exist. Back then, employees took actual vacations.

Don't believe me? Watch a few episodes of AMC's *Mad Men*. Odds are that you probably won't recognize the 1960s' world of work. Although it predates me by a few years, it's an authentic portrayal of office life back then.

The modern-day workplace is a far cry from those quaint days. Employees today are bombarded with a constant barrage of often pointless emails, text messages, meeting requests, phone calls, and information. The era of Big Data is here, and far too often multi-tasking reigns supreme. The idea of working without interruptions is foreign to many employees. Thanks to smartphones, we're almost always reachable, even when we are supposed to be on vacation.

If you're stressed while on the clock, at least take solace in the fact that you're not alone. According to a 2018 Korn Ferry survey, "Nearly two-thirds of professionals say their stress levels at work are higher than they were five years ago." (Read the study at <https://tinyurl.com/y2jxeatr>.)

Enter Slack, a tool that makes work more manageable and less overwhelming. Slack's cohesive set of powerful features allows employees to regain control of their professional lives in a number of simple yet effective ways. In addition, Slack allows you to communicate and collaborate well with your colleagues, managers, clients, partners, and vendors.

No, Slack doesn't solve every conceivable workplace problem. No software program can. Still, when used properly, Slack helps employers build valuable organizational knowledge bases, increase productivity and transparency, and often maintain an edge over their competition. Employees benefit as well in the form of less chaotic work environments, fewer emails, being able to more easily find key information, and much more.

About This Book

Slack For Dummies is the most extensive guide on how to use this powerful, flexible, affordable, and user-friendly collaboration tool. It provides an in-depth overview of Slack's most valuable features — some of which even experienced users may have overlooked since adopting it. This text goes beyond merely showing you how to install, configure, and customize Slack. It also offers practical tips on how individual users, groups, and even entire firms can get the most out of it. In short, this is the book that I wish I had when I taught myself Slack years ago.

As with all titles in the *For Dummies* series, you'll find the book's organization and flow straightforward and intuitive. The tone is conversational. Ideally, you'll have fun while concurrently learning how to use an increasingly important, popular, and useful application. I certainly had fun writing it.

Foolish Assumptions

I wrote *Slack For Dummies* with a number of different cohorts in mind:

- » People who are frustrated from wasting time at work mired in their inboxes and have finally had enough.
- » People who generally want to know more about how Slack works.
- » Organization decision makers who (correctly) believe that their employees can collaborate and communicate better and be more productive.
- » Employees at organizations that have already experimented with or purchased Slack and want to do more with it.
- » People in different social or professional groups who need an easy way to communicate with fellow members, coordinate events, and the like.



REMEMBER

Slack For Dummies is geared toward everyday users, not application developers. To be sure, I mention a few resources for people who want to know more about building new apps. Make no mistake, though: This book is for normal users. If you are a proper developer and you're looking for a text on how to build Slack apps and access its application programming interfaces, unfortunately you'll have to go elsewhere.

Slack For Dummies presumes zero prior use or even knowledge of the application. Nada. If you're not exactly tech-savvy, then fret not. Perhaps you're merely curious about what this "Slack thing" can do and how you'd do it. Congratulations: You've found the right text.

I do, however, assume the following:

- » You are curious about how Slack can make your work life less chaotic.
- » You receive plenty of internal emails and sometimes struggle managing your inbox.
- » You know how to use a proper computer, whether it's a Mac or PC.
- » You can navigate mobile devices, such as smartphones or tablets.
- » At some point in your life, you've accessed the World Wide Web with an Internet browser.

I'm a firm believer in truth in advertising. By way of background, my editor and I wanted to keep this book at a reasonable length and cost. To do so, we made a few conscious decisions about its content, and I want you to know about them from the get-go.

First, the book that you're holding isn't nearly as long as *War and Peace*, but it certainly isn't slim. Please understand going in that *Slack For Dummies* does not include step-by-step directions on how to configure and tweak each and every setting or feature in any single Slack plan, never mind all four of them. Such a task is simply impractical. Even if it were, Slack adds new features on a regular basis and sometimes changes existing ones. All software companies do today. The fleas come with the dog.

Just about every other author of a contemporary book of a robust application has had to confront the same inherent tradeoff. I'm not special. Consider Greg Harvey's *Excel 2019 For Dummies* (Wiley Publishing, Inc.), a 432-page tome on Microsoft's iconic spreadsheet program. As comprehensive as that text is, it does not contain detailed examples of all Excel functions and features because it can't. Nor can it cover all of the subtle distinctions between the Excel Mac and PC versions. The same limitation applies to the equally lengthy *WordPress For Dummies* (Wiley) by Lisa Sabin-Wilson and countless others in this series.

I've deliberately chosen my battles here. *Slack For Dummies* highlights:

- » What I believe are Slack's essential and frequently used features
- » Obscure features that members *should* use — or at the very least know about — and how to intelligently use them

In some cases, I describe a feature without spending valuable space on how to actually do it because Slack makes it self-explanatory.

Second and in a similar vein, I have intentionally written all the instructions in this book to be as device-agnostic as possible. In other words, I demonstrate how to do things in Slack by using its desktop application. In some necessary cases, I do the same by accessing Slack via a browser. Put differently, I almost always demonstrate Slack's functionality using a proper computer, whether that's a PC or a Mac.

No, I'm not living in the 1970s and 1980s. (Well, maybe with my taste in music, but that's a different discussion.) I know full well that mobile devices arrived in earnest a long time ago. At times, I'll mention how you can perform a specific Slack action on a smartphone or tablet. Largely due to space considerations, however, I simply cannot replicate how to execute each Slack task on all iOS and Android versions and devices. Minor differences persist. Even if I somehow managed to pull that off in the following pages, you'd probably find half of my directions irrelevant to you. I have met very few people who use both types of devices. People typically pick one side or the other. Brass tacks: To borrow a line from Greek philosophy, in this book the needs of the many outweigh the needs of the few.

Fear not, young Jedi. The vast majority of users find Slack to be remarkably intuitive. You'll soon be able to naturally perform most of Slack's key functions on the mobile device of your choice. In the event that you're flummoxed about how to accomplish something on your phone or tablet, Slack's website contains detailed instructions on how to do whatever you want on just about whatever device you want.

Icons Used in This Book

Throughout the margins of this book are small pictures that highlight key information:



TIP

This icon highlights shortcuts that should save you some time.



WARNING

Be careful whenever you see this icon.



TECHNICAL
STUFF

This icon highlights technical information that may or may not interest you. If not, then feel free to skip it.



REMEMBER

You'll want to keep key points in mind as you work in Slack. This icon highlights those points.

Beyond the Book

In addition to what you're reading right now, this product also comes with a free access-anywhere Cheat Sheet that gives you a Slack-term glossary and a list of keyboard shortcuts. To get this Cheat Sheet, simply go to www.dummies.com and type *Slack For Dummies Cheat Sheet* in the Search box.

Where to Go from Here

You need not start this book on page one and continue to the end; *Slack For Dummies* isn't a novel. If you've already dabbled with this powerful collaboration tool, then you can jump around to the sections that pique your interest. I've written it in that vein.

If you're only considering hopping on the Slack train or have only heard about it, then you should start with the first two chapters. From there, you'll want to read the book in a relatively linear manner.

Regardless of where you ultimately start reading, you'll find it helpful to create a new, free Slack workspace or log into an existing one. I also recommend downloading the Slack app for your computer and at least one mobile device. I have taught myself how to use plenty of new programming languages, applications, and technologies over the years. Throughout my career, I have found that getting my hands dirty and doing the exercises myself to be invaluable.

The journey begins now.

THANK YOU

Thank you for buying *Slack For Dummies*. I hope that you find it useful, informative, and even a little entertaining. Throughout this book, I have emphasized the many *potential* benefits of Slack and how to take advantage of them.

I qualified the previous statement because Slack has never been an elixir to all corporate ills and sources of dysfunction. It never will be — nor will any technology or app, for that matter. Employees who revert to email and use Slack intermittently will fail to recognize its considerable advantages. As with any new tool, Slack's ultimate success hinges upon many factors. At the top of my list are opening your mind and setting realistic expectations for what it can and can't do.

I wish you the best of luck on your journey to communicate and collaborate better with your colleagues. Let me know if I can help.

Slack on,

Phil Simon | www.philsimon.com

April 28, 2020

1

**Working Smarter
and Better with
Slack**

IN THIS PART

Meet Slack

Discover the problems that Slack solves

Navigate your way around Slack

Examine Slack's different versions and roles

Create a Slack profile

- » Identifying the reasons that so many employers and employees embrace Slack
- » Uncovering Slack's advantages over email
- » Understanding the many business problems that Slack solves

Chapter **1**

Why Slack Exists

What is Slack anyway? Where did it come from? Was it the result of long-term planning, a eureka moment, or a happy accident? And what business problems can it solve, anyway?

This chapter answers these questions in spades. Further, it provides some background information about Slack.

Introducing Slack

Slack stands for *Searchable Log of All Conversation and Knowledge*. This is what many in the business world call a *backronym*: a contrived acronym. To be sure, I've seen plenty of backronyms — especially in my HR days. In this case, though, the term happens to be entirely fitting.

Slack is “where work happens.” This is the pithy answer — and the one that adorns the company's website. The company's lofty mission is “to make work life simpler, more pleasant, and more productive.”

I'll cut to the chase: Mission accomplished.

At a high level, Slack is a relatively new and powerful application that allows people to work, communicate, and collaborate better — one that has become

increasingly popular since its launch way back in August 2013. At its core, Slack brings people together to accomplish goals through what it now calls a *workspace*. (Slack used to call this a *team*.) Figure 1-1 shows what one looks like.

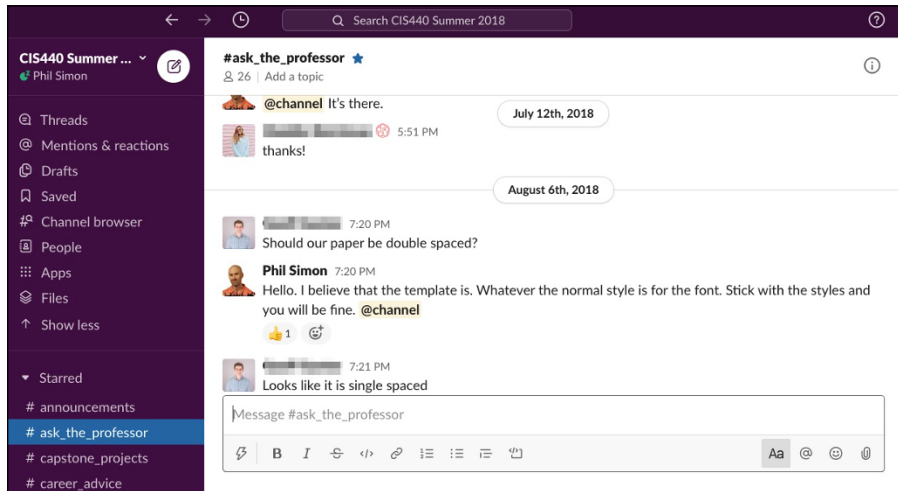


FIGURE 1-1: Slack workspace of a college professor.



TIP

If you're chomping at the bit and can't wait any longer, take an online tour of Slack by visiting <https://slack.com/features>.

Slack's popularity has exploded since its early days. As such, you may think that the idea behind Slack required years of meticulous planning and deliberation. And you'd be wrong. If you're curious about Slack's origins, check out the nearby sidebar "A happy accident: Slack's background and history." To listen to a longer version of the Slack story from the mouth of CEO and co-founder Stewart Butterfield himself, go to bit.ly/sl-podc.

In effect, Slack accidentally popularized — and some would argue even created — a new and colossal product category. This is no easy feat. International Data Corp labels this category the *team collaborative applications market*. The research firm estimates that worldwide spending on collaboration software is currently \$16.5 billion and will reach more than \$26.6 billion by 2023.



REMEMBER

Slack is a nicely packaged set of integrated collaboration tools. In the interest of full disclosure and as Chapter 14 covers, though, other software vendors previously released somewhat comparable products.



TIP

Chapter 7 covers Slack's search functionality in depth.

A HAPPY ACCIDENT: SLACK'S BACKGROUND AND HISTORY

In 2009, Stewart Butterfield, Eric Costello, Cal Henderson, and Serguei Mourachov started a company called Tiny Speck based out of Vancouver, British Columbia. The company was building a massively multiplayer online game called *Glitch*.

After a few years of toiling away, the Tiny Speck founders realized that *Glitch* was never going to reach critical mass. Most startup founders have a hard time killing their darlings, but Butterfield and his cofounders could no longer ignore the obvious: It was time to abandon ship.

Don't mistake this story, though, as another example of an irresponsible startup depleting its funds. By way of background, Butterfield and his team were experienced entrepreneurs. (Butterfield's previous company, Ludicorp, had sold its photo-sharing service Flickr to Yahoo! in 2005 for roughly \$25 million.) Tiny Speck managed its money well and still had plenty of *runway*, to use the parlance of Silicon Valley.

Tiny Speck's founders offered to return all their remaining funding to their investors, but the entrepreneurs first wanted to float an idea. While building *Glitch*, the team had cobbled together a valuable internal collaboration tool. The entrepreneurs enjoyed working with one another, and they were curious about where this new tool could go. Tiny Speck's investors agreed and let them pivot.

Slack launched the beta version of its product in August 2013. Roughly 8,000 people immediately signed up. Slack grew quickly and organically, largely thanks to marketing's holy grail: word-of-mouth.

Growth has exploded since then. With Butterfield as CEO, Slack Technologies, Inc. started trading on June 20, 2019, on the New York Stock Exchange under the apropos symbol \$WORK. Its value exceeded \$14 billion on February 11, 2020, after it closed a massive deal with IBM. Here are some fascinating Slack statistics:

- As of January 2020, more than 12 million people use Slack. Collectively, they send more than a billion messages every day.
- Every week and on average, an astonishing five billion actions take place on Slack. I'm talking about reading and writing messages, uploading files, commenting on them, searching for content, automating tasks, and interacting with third-party apps.

(continued)

(continued)

- Approximately half of Slack's daily active users live and work outside of the United States.
- You can find Slack users in more than 150 countries in the world.
- More than 600,000 organizations use Slack — more than 100,000 of which pay for it. Customers include Pinterest, Airbnb, CNN, Target, and Zappos.
- At least 65 percent of Fortune 100 companies pay for Slack.
- As of this writing and according to LinkedIn, 42 percent of Slack's more than 2,000 employees in its 18 offices previously worked at a top-80 tech company. By comparison, at Google that number is 58 percent.
- Nearly 22 percent of Slack employees graduated from a top-30 university. This number is second to Google's 22.3 percent.
- The accounting firm Kruze Consulting found that 60 percent of funded startups not only use Slack, but they pay for the privilege of doing so.

For more interesting Slack facts, go to bit.ly/sl-facts.

UNDER THE HOOD

Slack uses an impressive array of powerful, contemporary technologies, programming languages, and frameworks to work its magic. That is, it does not attempt to cram everything into a single language or framework because one size does not fit all.

According to chief technology officer Cal Henderson (and author of this book's foreword):

- Slack's web client/desktop app runs on a mix of JavaScript, ECMAScript 6 (ES6), and React.
- Slack's Android client is written in a mix of Java and Kotlin.
- Slack's iOS app relies upon both Objective C and Swift.

As for hosting, Slack engages Amazon Web Services (AWS), the world's most popular provider of cloud computing. Visit bit.ly/slackstack for more on the specific technologies that Slack uses.

Meeting Slack's Users and Customers

Thanks to its flexibility, Slack appeals to the smallest of startups, the largest of conglomerates, and organizations of every size in between. Firms old and new have jumped on the bandwagon.

Next, using Slack is not a binary. As you can see in Chapter 2, organizations can test its waters without making long-term financial commitments. (In this case, you *can* get a little bit pregnant.) Beyond that, individuals, groups, and departments can benefit from using Slack even if it hasn't spread throughout the entire organization — yet. To be fair, though, putting less into Slack means that employers will get less out of it.

The industries that use Slack run the gamut: technology, media, music, higher education, retail, hair salons, and restaurants. I'm hard-pressed to think of an area that Slack hasn't touched. Beyond scrappy upstarts and for-profit organizations, government agencies such as the U.S. Census Bureau and the State Department also call themselves Slack customers. Tech-savvy and tieless ex-Democratic presidential candidate Andrew Yang used it to quickly bring his new campaign volunteers up to speed. I could keep going but you catch my drift.

As for age, Slack users run the gamut. If you think that it's a tool exclusively for millennial hipsters, think again. I'm anything but a 20-something, and people far older than I use it on a daily basis.

Most fascinating to me, an increasing number of informal groups creatively use Slack to assign tasks, plan events, and communicate. I'm talking here about book clubs, hiking groups, sports leagues, and others. Then there are families. Yes, families. (Read more at bit.ly/sl-fam3.)

Bottom line: Slack appeals to diverse types, sizes, and compositions of formal organizations and informal groups. Every day, Slack allows millions of people to eschew outdated and ineffective communication methods. The biggest culprit: the mass email thread. Slack's ability to significantly curtail internal email represents a major reason that so many enlightened souls have embraced it.



TIP

To read detailed case studies on how different organizations and industries use Slack in creative ways, go to bit.ly/slackwow.

HOW I BECAME A SLACK FANBOY

In August 2016, I began my new career as a full-time college professor. I started teaching technology- and data-related subjects at ASU's W. P. Carey School of Business.

During my first year, my plate was beyond full. In no particular order, I had to familiarize myself with material for three different 400-level classes. Beyond preparing lectures, I felt compelled to overhaul most of my predecessors' opaque syllabi, assignment rubrics, and presentation slides.

Oh, I'm nowhere close to finished describing my to-do list.

I also needed to complete a number of obligatory school-specific training courses, figure out how academe works, meet with students, grade papers, design exercises to promote active learning, record videos, and become proficient at the school's learning-management system or LMS at the time (Blackboard). Oh, and I wrote a book for my analytics class.

No, I wasn't bored.

On the collaboration and communications side, like many of my colleagues, I immediately found Blackboard wanting. Given my other responsibilities, though, I wasn't about to rock the boat from the get-go. (Even if I had loved Blackboard, using another tool would have benefited my students. After all, the vast majority of my students certainly wouldn't be using an LMS after graduating.)

During my first two semesters, I experimented with some different in-class communication tools, such as Google Forms and WordPress. Ultimately, nothing really struck my fancy. Yes, those tchotchkes were useful, but they just weren't integrated. I didn't want to confuse my students. What's more, those standalone tools didn't encourage targeted communications with them.

With a year of teaching under my belt, in fall 2017, I decided to give Slack a whirl.

In a nutshell, Slack changed everything. I have proudly used it every semester since for all my classes. I have even convinced some of my hidebound colleagues to give it a shot. Not a day goes by that I don't use Slack. For the most part, my students love it.

Understanding Why Slack Exists

In hindsight, the birth of Slack was serendipitous. Lest you dismiss it, though, the problems that Slack solves are anything but trivial.