

LEARNING MADE EASY



# Slack

for  
**dummies**<sup>®</sup>  
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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*

 **slack**

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

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## **Slack™ For Dummies®**

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# Foreword

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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

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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](http://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](http://www.philsimon.com)

April 28, 2020

## **Part 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

# Chapter 1

## Why Slack Exists

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### IN THIS CHAPTER

- » 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
- 

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.

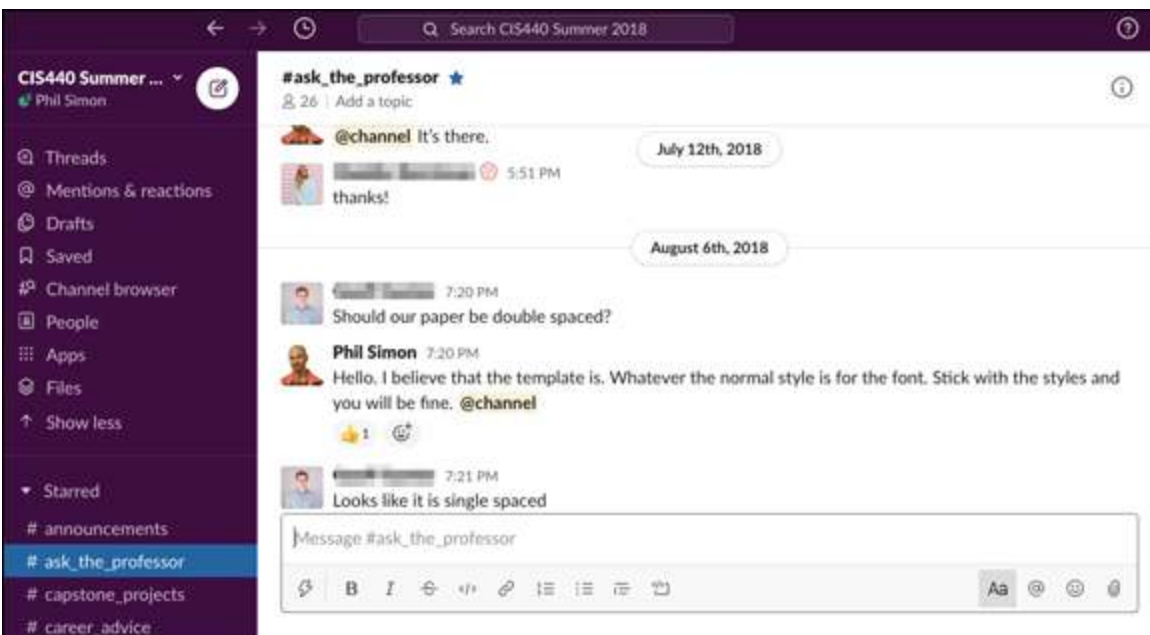
## *Introducing Slack*

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