

# Slack Guidelines



AM OPPORTUNITIES



**AMO created this guide as a central resource to ensure everyone gets the most out of using Slack.**

At the heart of ensuring equity, embracing diversity, and fostering inclusivity is how we speak with each other. We use Slack to communicate in many ways and know how important information flow is to our success—especially in the ever-changing hybrid work environment. That is why this guide has multiple sections dedicated to areas such as common practices, tips, and how we organize our channels. Think of this resource as a guide rather than a set of rules.

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# EXPECTATIONS

## 1. Update your profile

Be sure to include your name, photo, and role. Feel free to add additional information if you'd like!

## 2. Make your availability clear

- **Status Updates**

Use status updates to let others know when you are away or when they should expect a delayed response.

- **Do Not Disturb**

When you're not working, consider logging out or setting Do Not Disturb (DND) so that you can get out of work mode and recharge.

- **Turn Off Slack**

You can turn off Slack or use DND mode. You can do so to help you focus. If you do, make sure your team is aware and has an alternative way of contacting you.

- **Standard Schedule**

We recommend setting a standard Do Not Disturb schedule (for example: before 7 a.m. and after 7 p.m.) for your peace of mind. Consult with your team on your availability and whether these hours make sense for you. See [How-tos section \(page 13\)](#) for steps on how to set a standard DND schedule.

## 3. When and how to use Slack

- **Response Timing**

During business hours, if you are not available to respond via Slack for longer than 30 minutes, make sure it is communicated to your team via calendar/Slack message/Slack integration.

- **Hours to Send Messages**

Messages can be sent on Slack at any time, however, if you need to send a message during the night or on the weekend, use private channels or direct messages whenever possible rather than large public channels.

- **Schedule Messages**

You can also schedule messages to deploy during the morning of the next business day to send messages by utilizing the 'Schedule for later' feature if the message is not time-sensitive and outside of business hours. See [How-tos section \(page 12\)](#) for steps on how to schedule a message.

- **Set a Reminder**

Utilize the "Set a reminder" feature to ensure that to-dos are sent over or not forgotten. This gives yourself time to complete another task before formulating a response. See [How-tos section \(page 11\)](#) for steps on how to set a reminder.

# MESSAGING & COMMUNICATION GUIDELINES

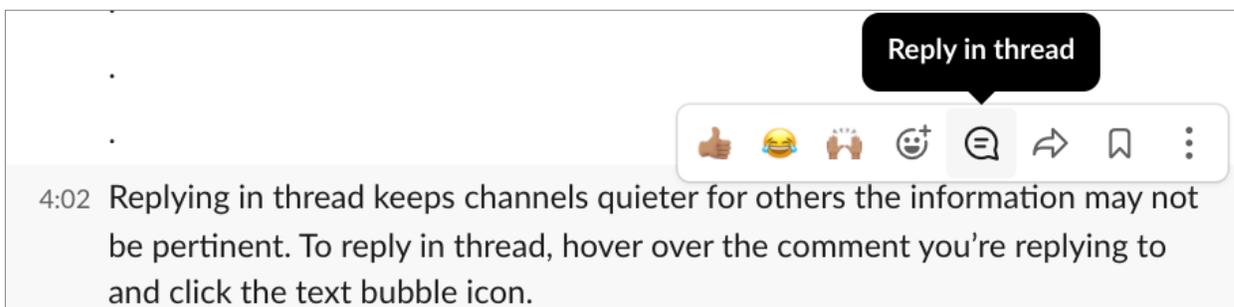
## 1. Treat Slack more like email the more people there are in a channel

- Use Slack for shorter communications as Slack isn't conducive for in-depth, analytical work that requires ongoing conversations lasting days or weeks (A project document should be used instead.)
- Larger channels get more cluttered; try to use formatted, punctuated messages.
- Direct messages can be more informal.

## 2. Use threads when replying.

- Threads collect similar, relevant information together, which makes it easier to find later through searches.

**PRO TIP:** Replying in a thread keeps channels quieter for those who may not find the information relevant. To reply in thread, hover over the comment you're replying to and click the text bubble icon.



## 3. If you choose to work on a request later, it is good practice to tell your co-worker that you have seen the message and will get around to the request later.

- e.g. "Just wanted to let you know I have seen this message. It may require help, so I reached out to the rest of the team. I'll have an approximate delivery date to you this afternoon."
- e.g. "Thanks for reaching out. I'm in meetings this morning but once I get some time later this afternoon, I'll be sure to reach back out to you. If this request is urgent and you need an immediate answer just let me know, and I'll see if I can prioritize this issue."

**PRO TIP:** Set a reminder to come back to a message at a later time. See [How-tos section \(page 11\)](#) for steps on how to do this.

## 4. If a team member is out of office, DM or message them in a private channel as opposed to @ing in a public channel.

- e.g. "I know you're out this week, but I wanted to make sure you received the recording from the meeting this morning. We can recap more when you're back. Enjoy California!"

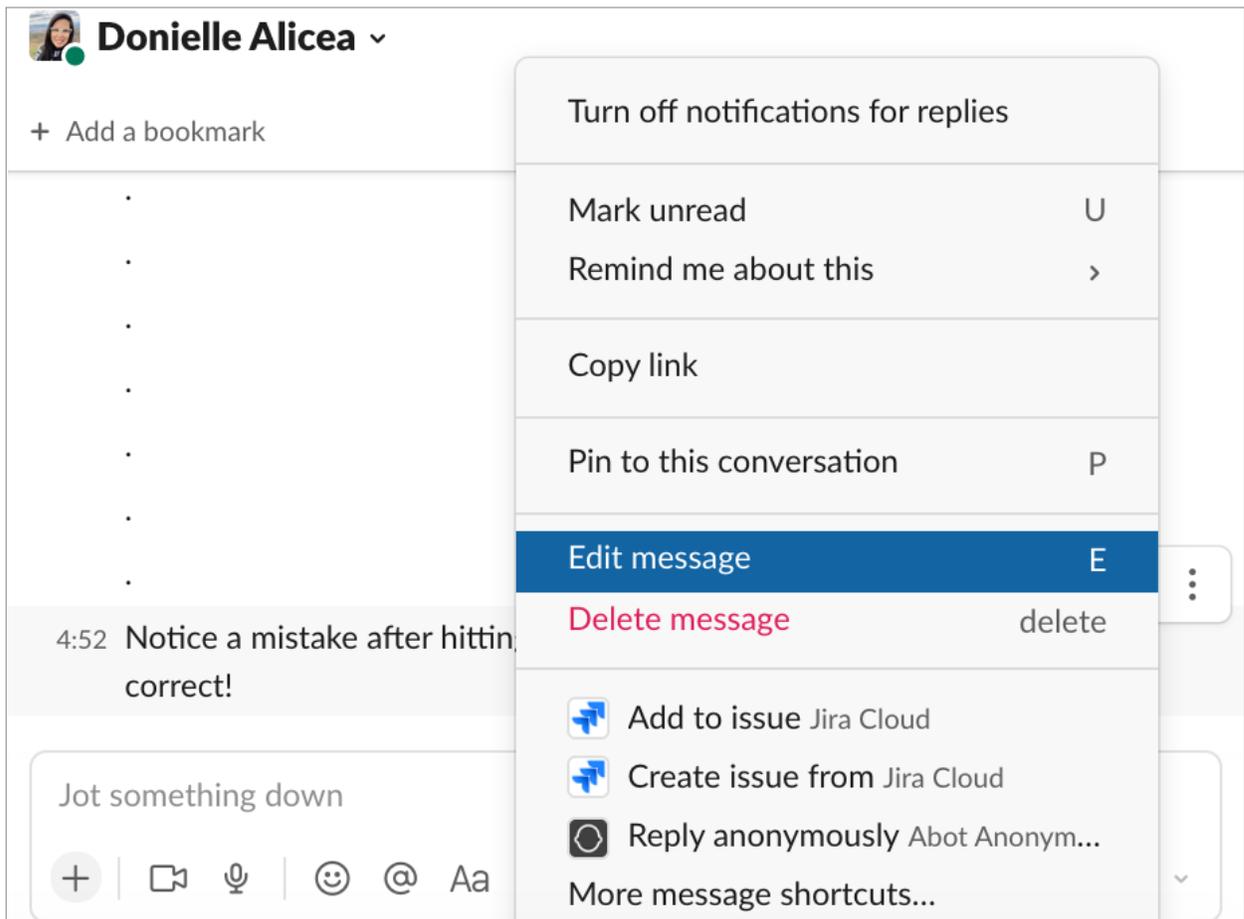
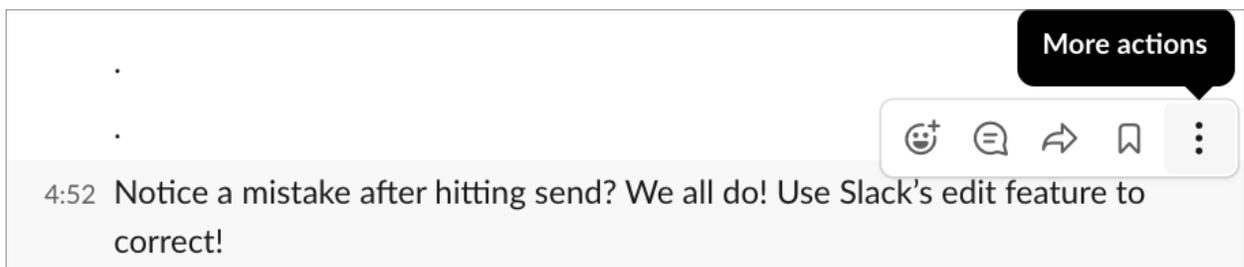
5. Emergencies should be messaged in a DM or in the designated channel for that department or emergency. Tag the person who needs to be contacted.

- e.g. “@name, WordPress crashed this week and removed all posts scheduled during your PTO. Are the drafts saved somewhere? We will post and fix for you!”

6. Utilize editing messages and reviewing messages before sending.

- A quick spell and grammar check helps ensure clear communication, especially with longer messages. A tip is to read a message aloud to yourself before hitting send.

**PRO TIP:** Notice a mistake after hitting send? We all do! Use Slack’s edit feature to correct. To edit a message, hover over the comment you want to change and click the ellipsis (pictured below) then select ‘Edit message’ (also pictured below).



# BEST PRACTICES/CHANNEL POLICIES

## 1. Creating a new channel

- Send an introductory message when creating a new channel to the members you've invited, which describes the purpose of the channel.
- Send a direct message before adding someone to an existing channel, helping them understand what will be discussed in that channel.
- When creating a channel, include a channel description.
- Check group naming (e.g., team, proj, and dept).
  1. **proj-** should be used when working with members from different departments on an extended project that will last over a period of months or years.
    - » e.g. proj-b2b is compiled of members from programs, partnerships, marketing, sales, VE, tech, and operations. Individuals in this channel work on items related to hospital, school, and partner recruitment.
  2. **team-** should be used when members from different departments are working on the same team toward a common goal.
    - » e.g. team-ads is compiled of members from marketing, tech, and operations. Individuals in this channel work collaboratively on ads.
  3. **dept-** should be used when creating a channel for one of AMO's departments.

**PRO TIP:** Additional channels should be created in an effort to improve communication and transparency, or when creating a space for those with shared interests (i.e., sports, entertainment, movies, food, gardening, etc.).

## 2. Onboarding New Hires

- Manager should review channel list and ensure new hires are in all necessary channels.
- Ensure new hires are introduced in general channel and team channels.

3. Consider utilizing integrated apps. This allows Slack to be your one-stop app to see all incoming requests and upcoming meetings. Apps to consider are listed below. For steps on how to integrate apps, see [How-tos section \(page 11\)](#).

- Jira
- Outlook
- Sharepoint
- Hubspot
- Trello
- Zoom

#### 4. Using @

- **@here**

Notifies only those who are currently active. Those not active won't get notified.

- **@channel**

When you want to make an announcement, using @channel will send a push notification to all members in that channel. If a member of a channel isn't active on Slack when the message is sent, they'll get notified of your message when they become active. It should be used for emergencies or channel-wide announcements—messages you want everyone to get, no matter what.

- **@mention**

To tag a specific person and improve chances of response. Assume someone won't see your message unless tagged.

## DO'S AND DON'TS

### DO

- ✓ Be on Slack if you're at work and available.
- ✓ Treat each other with respect.
- ✓ Assume good intent.
- ✓ Unplug.
  - » Utilize "Do Not Disturb" mode. We recommend setting nightly Do Not Disturb based on your work schedule.
  - » Do not feel pressured to respond to a message after work hours unless it is an emergency.
- ✓ Mute channels you're not active in (you'll still be notified if you are @mention).
- ✓ Do a routine decluttering; leave channels that are no longer relevant to you.
- ✓ Do post in private channels when discussing an internal subject, project, or private issue that affects only certain team members or one department.
- ✓ Do post in public channels when information impacts the full company or more than one department.
- ✓ Do use reactions as an acknowledgment. This approach limits notifications and minimizes the back-and-forth loop of 'Thanks' and 'You too'. Here are a few examples:
  - » Use a checkmark ✓ to acknowledge receipt of a message.
  - » Use eyes 👁️ to acknowledge that you're reading or looking into something.
  - » Use a thumbs 👍 up or smiley face 😊 to show your approval or thanks.

### DON'T

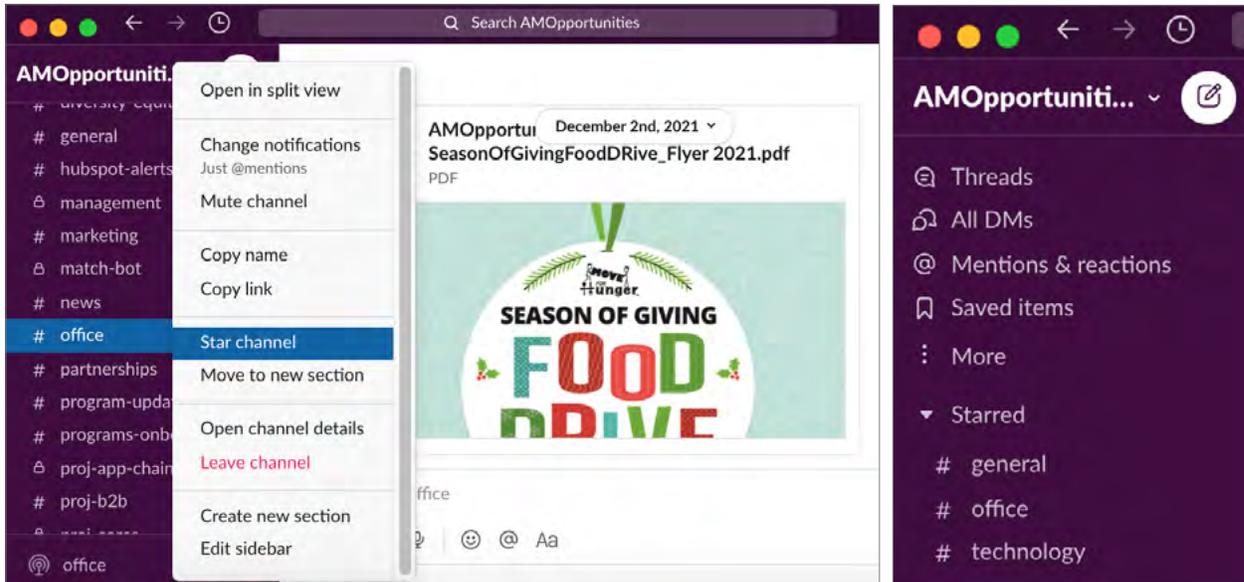
- ✗ Do not use Slack public, team, or project private channels to address personal issues. If there is an instance when you want to address a personal issue with a coworker, it is a good idea to do it privately in person, over Zoom, or in a Slack DM to avoid confronting a teammate in front of others.
- ✗ When possible, avoid long (200+ word), unstructured, unformatted posts. If you need to post a lengthy update, consider attaching a document or link to more details.
- ✗ Do not send multiple messages to an unresponsive teammate as they may be in a meeting or working on a project.

# HOW-TOS

## 1. Star important channels

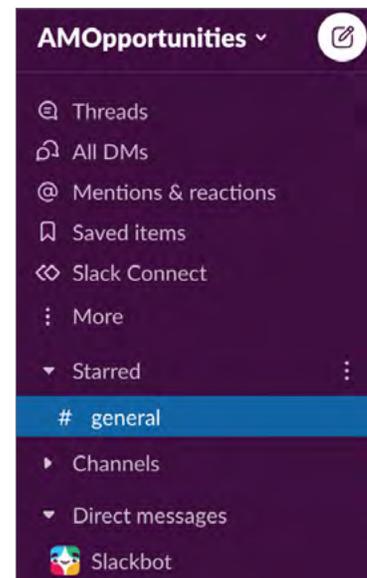
- To star a channel and essentially add it to your favorites, right click the channel and select 'Star channel'.

**PRO TIP:** Staring a channel moves it to the top of your Slack list. Best practice is to star General, Office, and Technology channels so you do not miss any important updates. Consider also starring channels that you frequently use for easy access.



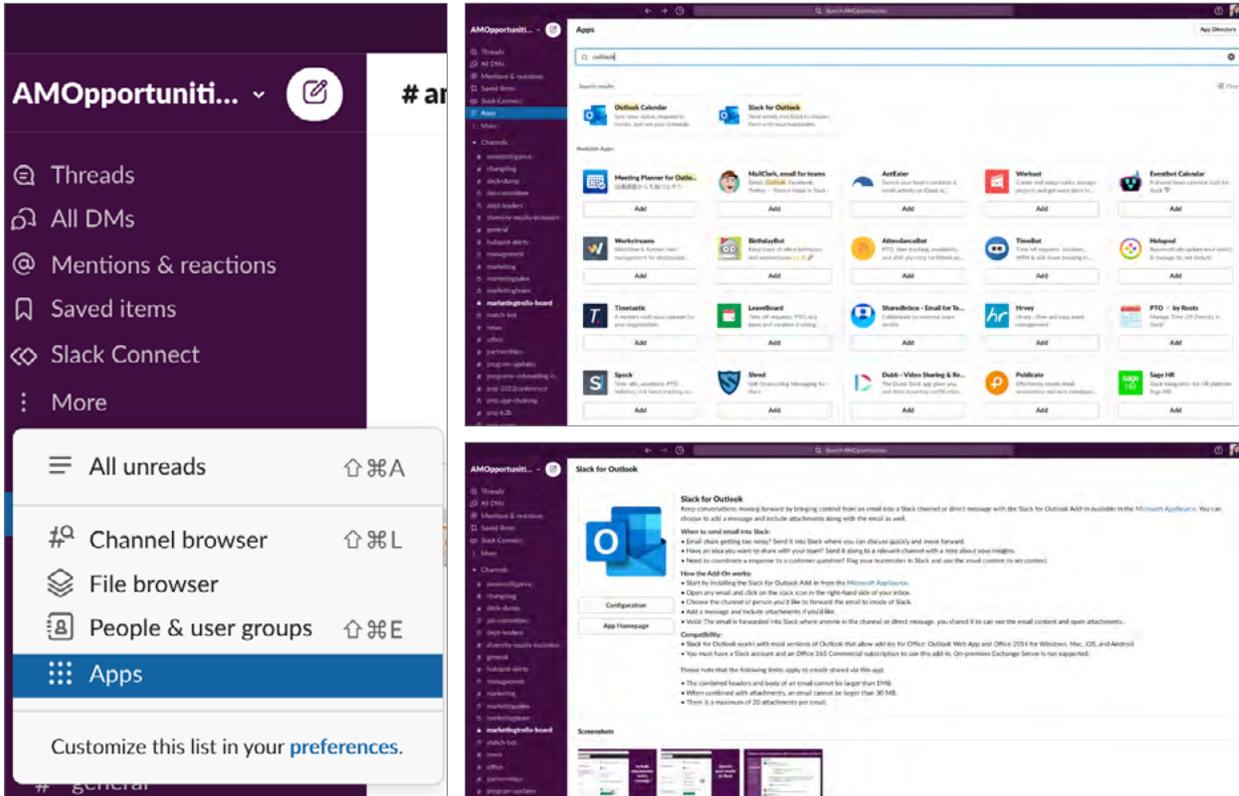
## 2. Edit sidebar to only show starred channels and DMs

- Preferences > Sidebar > Sidebar settings
- Or right click conversation/channel and select "Star"
- Organize sidebar into sections



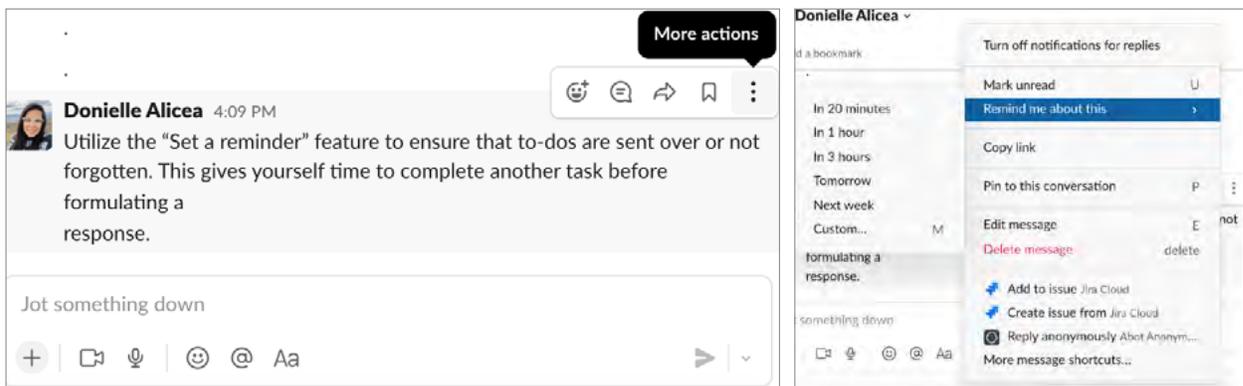
### 3. Integrate apps to Slack

- Below is an example of how to integrate Outlook to Slack. You can follow these steps to integrate other apps including Jira, Hubspot, and Trello. First click 'More' from the sidebar and select Apps. Type in the app you're looking for and follow the steps.



### 4. Utilize 'Remind me about this' feature to respond to a message at a later time

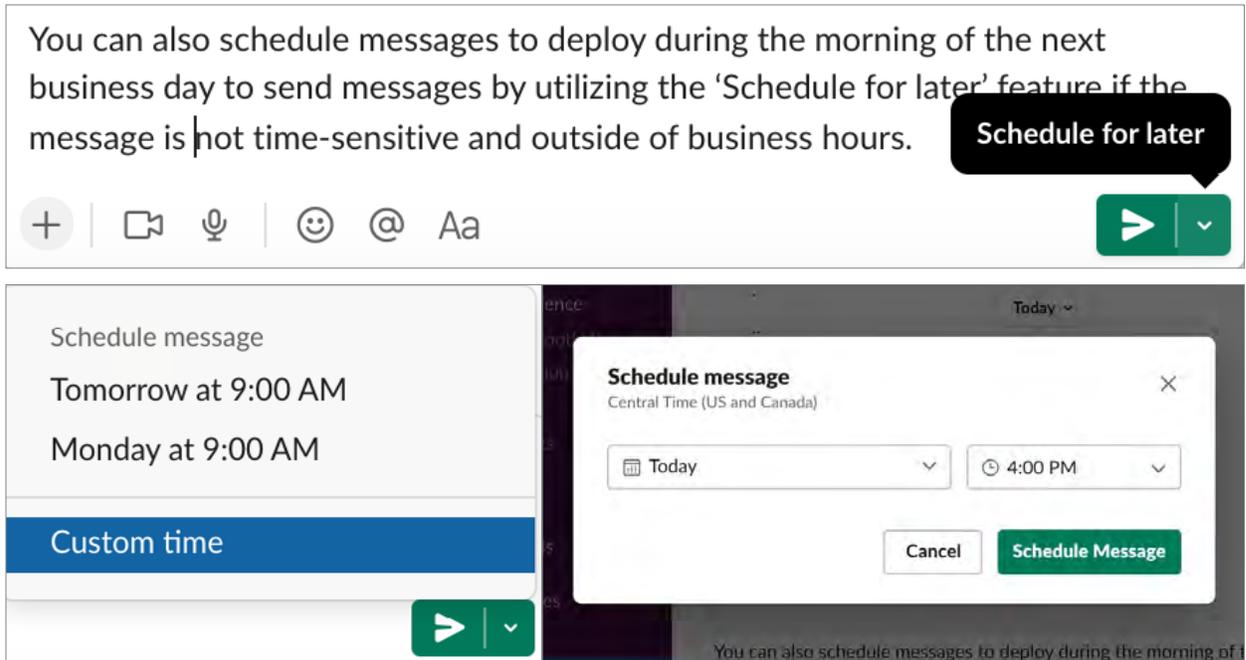
- To set a reminder, hover over the comment and click the 'More actions' ellipsis then select 'Remind me about this'.



## 5. Schedule to Send a message at a later time and date

- To schedule a message, first draft your message then hover over the caret found to the right of the send button. Click 'Custom time' and set the date and time you want your message sent.

You can also schedule messages to deploy during the morning of the next business day to send messages by utilizing the 'Schedule for later' feature if the message is not time-sensitive and outside of business hours.

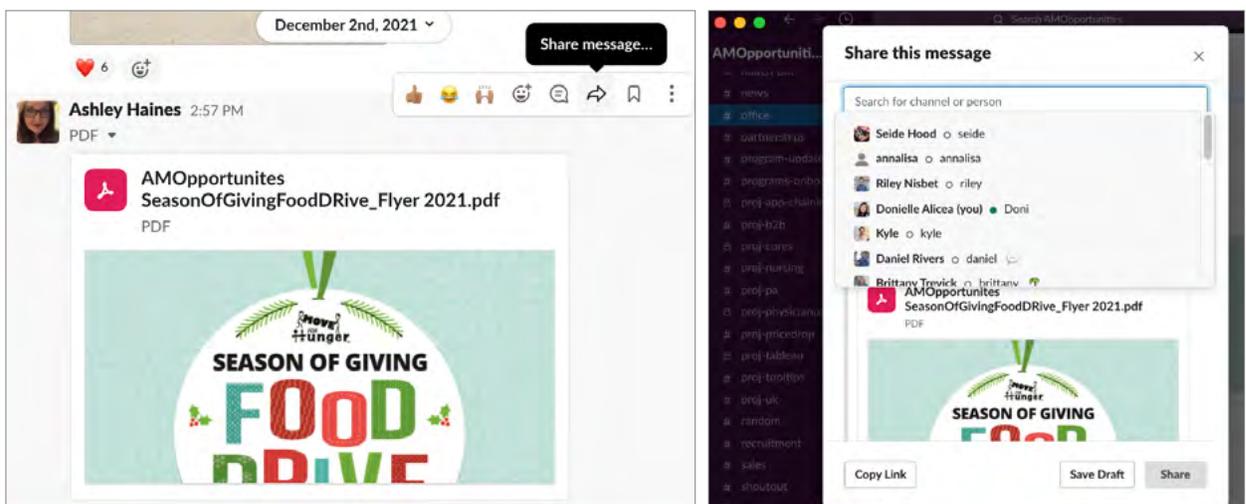


Schedule message  
Tomorrow at 9:00 AM  
Monday at 9:00 AM  
Custom time

Schedule message  
Central Time (US and Canada)  
Today 4:00 PM  
Cancel Schedule Message

## 6. 'Share Message' to Channel when necessary

- To send a comment made in one channel to another channel, hover over the comment and click the 'Share message' arrow, then type in the channel name.



December 2nd, 2021

Share message...

Ashley Haines 2:57 PM  
PDF

AMOpportunities  
SeasonOfGivingFoodDRive\_Flyer 2021.pdf  
PDF

Share this message

Search for channel or person

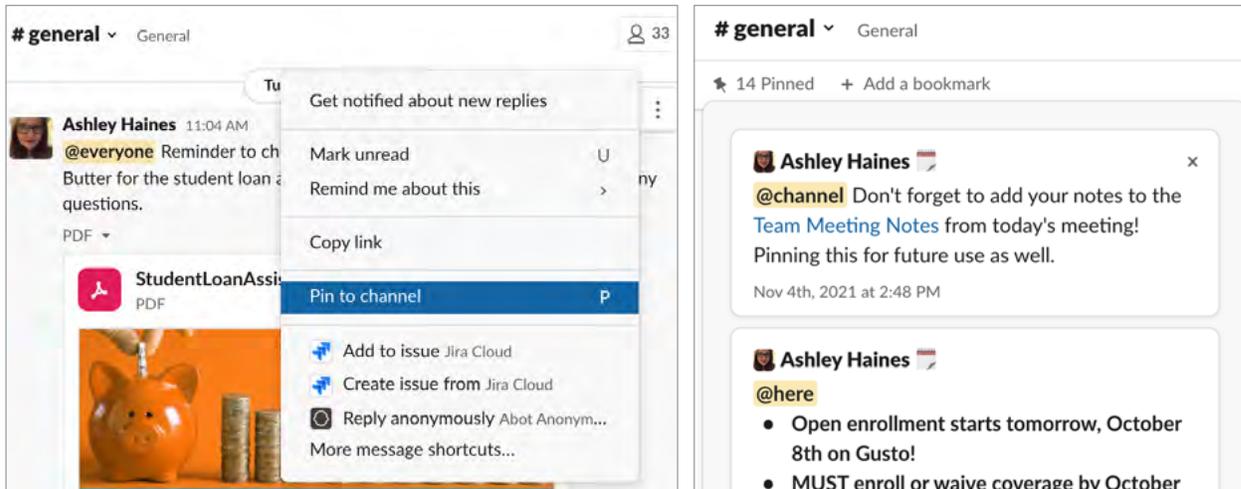
- Seide Hood o seide
- annalisa o annalisa
- Riley Nisbet o riley
- Donielle Alicea (you) o Doni
- Kyle o kyle
- Daniel Rivers o daniel
- Brittany Trevick o brittanv

AMOpportunities  
SeasonOfGivingFoodDRive\_Flyer 2021.pdf  
PDF

Copy Link Save Draft Share

## 7. Pin important links and documents

- To pin items so that important information is easy to find in a channel, hover over a comment and click the 'More actions' ellipsis, then select 'Pin to channel'. To later find the pinned items simply head to the channel and select the thumbtack icon at the top which lists the number of pinned items in a channel.



**IMPORTANT NOTE:** The difference between pinned items and saved items.

Pinned items can be selected by anyone and can only be found in the channel they are pinned in.

Saved items are items selected by an individual user in direct messages or a channel and can be viewed in 'Saved items' found in the sidebar. If you cannot view Saved items, navigate to sidebar settings and add Saved items.

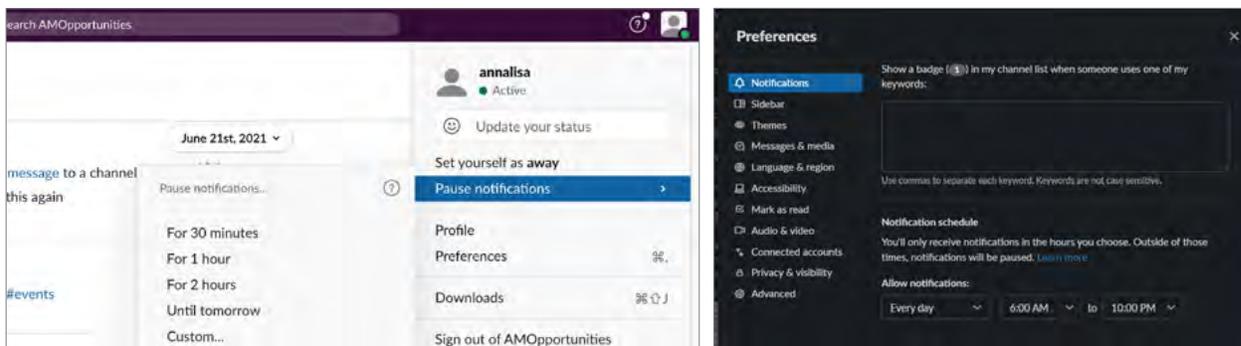
### Preferences

Notifications	Always show in the sidebar:
<input type="checkbox"/> Sidebar	<input type="checkbox"/> All unread
Themes	<input checked="" type="checkbox"/> All DMs
Messages & media	<input checked="" type="checkbox"/> Mentions & reactions
Language & region	<input checked="" type="checkbox"/> Saved items
Accessibility	<input type="checkbox"/> Slack Connect
Mark as read	<input type="checkbox"/> Channel browser
Audio & video	<input type="checkbox"/> File browser
Connected accounts	<input type="checkbox"/> People & user groups
Privacy & visibility	<input type="checkbox"/> Apps

## 8. Set scheduled Do Not Disturb

- To set yourself as away and to go into DND mode, select your icon at the top right and scroll to either Set yourself as away or Pause notifications for a designated amount of time.

**PRO TIP:** We recommend setting a standard Do Not Disturb schedule (for example: before 7am and after 7pm), settings and add Saved items.



# GLOSSARY

## **Active**

This refers to your status in Slack. The green dot next to your name lets your teammates know you're active.

## **Archive**

When a channel is no longer needed, you can archive it to close the channel to new activity.

## **Away**

This refers to your status in Slack. The grey dot next to your name lets your teammates know you're away.

## **Badge**

This is the red circular shape with a number next to a channel, member's name, or the Slack app icon when you receive a notification.

## **Calls**

With Slack calls, you can make a voice or video call and connect with any member of your workspace.

## **Channel**

Channels are spaces for all the people, tools, and files you need to get work done in Slack. You can create channels for different teams, topics, and projects to bring order and clarity to work.

## **Channel details**

Channel details provide information about a channel such as its topic, description, and a list of members who have joined it.

## **Direct message**

Direct messages are one-to-one conversations between you and another member.

## **Display name**

A person's first name or nickname listed in their profile. This is what people would like to be referred to in Slack.

## **Do Not Disturb**

Setting Do Not Disturb hours will automatically disable notifications while you're not working whereas manually pausing notifications allows you to disable them on the fly. When DND or snooze is in effect, Slack will not send you notifications (desktop, mobile, or email) for the messages or @mentions you receive.

## **Group direct message**

Group direct messages are smaller discussions, outside of channels, between you and up to eight other members.

## **Huddles**

A voice-only conversation in a Slack channel or direct message.

## **Mention (@mention)**

When you send a message and include an @mention, the person you mention will be notified. Type the @ sign followed by a member's full name or display name.

## **Mentions and reactions**

When people react to your messages or mention you or your keywords, you'll see it listed in the Mentions & reactions view at the top of your left sidebar.

## **Notification preferences**

You can customize your notification preferences for desktop, mobile, and specific channels from any device.

## **Pin**

Pin important items to a channel or direct message so you and other members can conveniently access them.

## **Reminders**

Send yourself or other members a reminder for anything: important meetings, to-do items, and even motivational messages.

## **Save**

Use the save icon to add important messages and files to your Saved items view and come back to them anytime.

## **Search**

Slack makes it easy to come back to the right messages and files when you need to. Use the search field to find a message or file and narrow results using filters and modifiers.

## **Thread**

A conversation consisting of an initial Slack message and its replies.