BUILDING DIGITAL HEADQUARTERS WITH SALESFORCE AND SLACK FOR HYBRID WORKFORCES

Abstract

Back in 2019 — the pre-pandemic days — out of 60 million US workers who could have worked virtually, only 8% exclusively worked from home and a third chose a hybrid approach.[1] Fast forward to the current 2022 post-pandemic scene, and we have 39% fully working from home and approximately another 42% have adopted a hybrid approach. Additionally, within the Indian technology sector, 70% of surveyed organizations from NASSCOM are inclined towards hybrid workspace in 2022.[2]

Virtual, from home, or hybrid working scenarios present significant challenges. How can you ensure inclusion? How can you maintain a strong engagement culture, productivity, and sense of belonging when employees work in an assortment of floating hybrid modes?

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Introduction

Pre-pandemic, businesses used to rely on solid brick and mortar (from retail shops to office buildings) to connect their employees, customers, and partners. Sometimes these businesses operated remotely for a few use cases and job functions, but the core sales and service workforce predominantly relied on face-to-face, on-site interactions.

Now we can rethink everything about how and where work happens. Salesforce and Slack[1] are jointly creating an operating workspace for the new hybrid work force. Tools like this that allow stakeholders to collaborate in a remote digital space, both synchronously and asynchronously, are key for digital-first hybrid organizations.
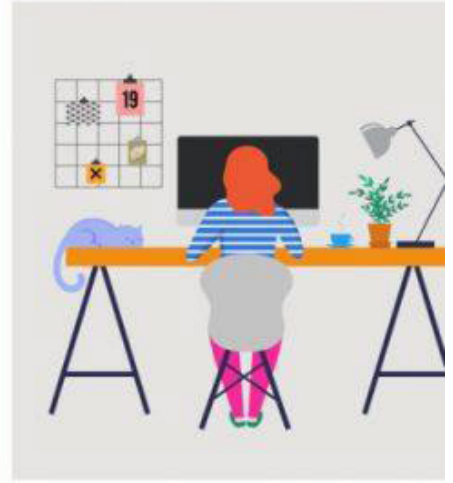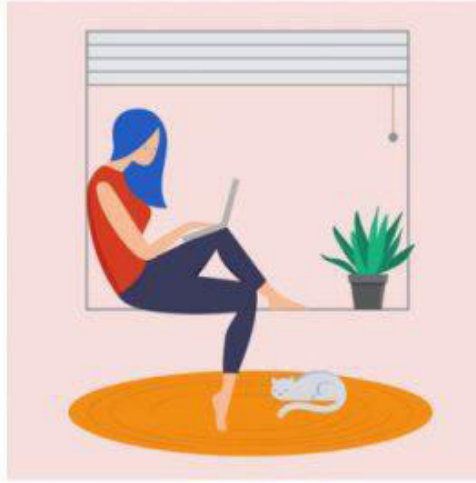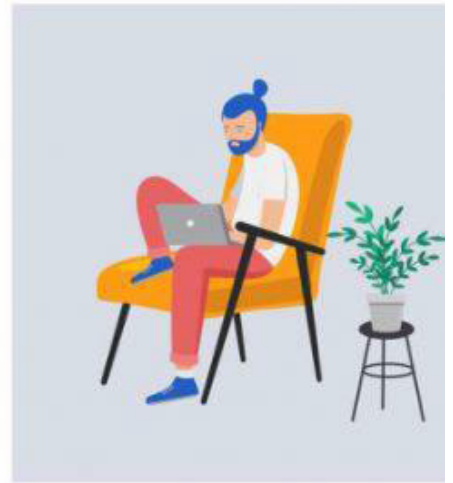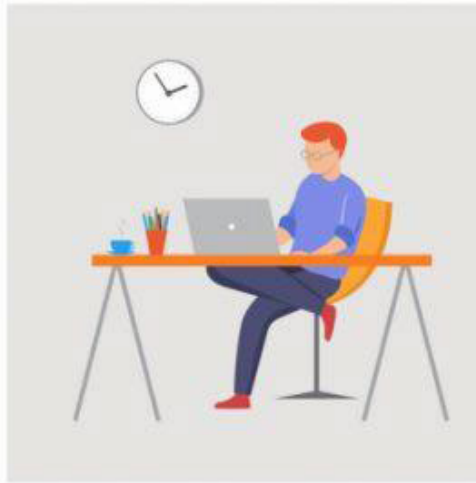
(Source: https://www.discprofiles.com/blog/2020/03/disc-working-from-home/)

Figure 1: Hybrid work model

Pre-pandemic work culture and the opportunity to transition

Businesses are increasingly moving away from email and instead moving more towards real-time messaging applications. But not everyone has made the shift to messaging. Certain teams, such as sales, continue to use email to schedule meetings or have conversations and then update their organization's Salesforce CRM later.

Slack has the potential to eliminate this extra step of manually populating Salesforce with customer data and, thereby, can keep CRM data more current. This means Slack can act as a reliable source for reporting as well as course correct actions taken and data entered through consistent communal accountability.

In fact, collaboration with Slack can reduce email usage by at least 30% [3].

Slack also enables leaner integrations, serving as a powerful engagement layer to bring apps, people, and processes together and create a connected digital ecosystem for businesses.

Impact factor to product vendor: salesforce viewpoint

Today, Salesforce has a fully integrated stack that gives employees a platform for efficient communication and builds ubiquitous workflows spanning a wider application throughout the organization.

Though several enterprise collaboration solutions have existed in silos before, the unification of these forces in the business landscape of an organization has led to a modern world hybrid work platform.

Slack serves as the link between all of the collaboration tools people use in a workplace. Now that Slack is part of Salesforce, its accessibility to Salesforce customers comes with the already purchased Salesforce licenses., This makes it far   more favorable for user adoption. Integrating Slack into Salesforce, just as Teams is integrated into Office 365, encourages large companies that use Office and Salesforce to use both Teams and Slack respectively.

With an open platform that integrates more than 2,400 apps,4 Slack brings people, data, and tools together so that teams can better collaborate and work from anywhere. Slack Connect also allows a company's employees to easily collaborate and communicate with external vendors and partners. Salesforce will be able to leverage this dynamic setup to create a strong ecosystem for developers.

Value proposition for Salesforce

Customers use Salesforce at least a few times a day. Slack, on the other hand, runs constantly in the background and is used several times an hour. Such a high level of user engagement has a catalytic effect on Salesforce upgrades. Slack is now taking over the shortcomings that Chatter left open (i.e., Chatter was mostly seen as intra-collaboration within the Salesforce eco system, whereas Slack is an enterprise layer

engagement platform to connect people, tools, and processes even beyond the scope of Salesforce CRM).

Salesforce has evolved over the years from just a CRM tool to a complete customer success platform. With Slack on board, Salesforce has found the missing layer of communication to complement its existing offering.

> "With Slack in the Salesforce ecosystem, it's much easier to connect employees, partners, and customers through conversations and notifications in the all-new hybrid way of work. Slack also helps Salesforce complement its Experience Cloud capabilities with a means to target lean/thin users"

Benefits of adopting slack in silo or along with salesforce core plus integrated with productivity tools

SLACK stands for "Searchable Log of All Conversations and Knowledge." And that's exactly what Slack does—it enables effective communication via direct messages and larger group channels as well as provides a seamless way to search and reference previous discussions or files. A Slack channel facilitates discussion amongst a group of individuals on a defined topic. Direct messages in Slack are intended for conversations that do not belong in channels.

Slack encourages connections in the workplace (whether synchronous or asynchronous), especially if teams are in different locations, time zones, and schedules. Phone calls, video conferencing, and screen sharing are all possible with Slack. The design is adaptable, secure, and scalable. Channels can be set up and disabled at any time and with valid justification. You can also include partners, existing clients, or prospects in various discussions.

Slack Benefits:

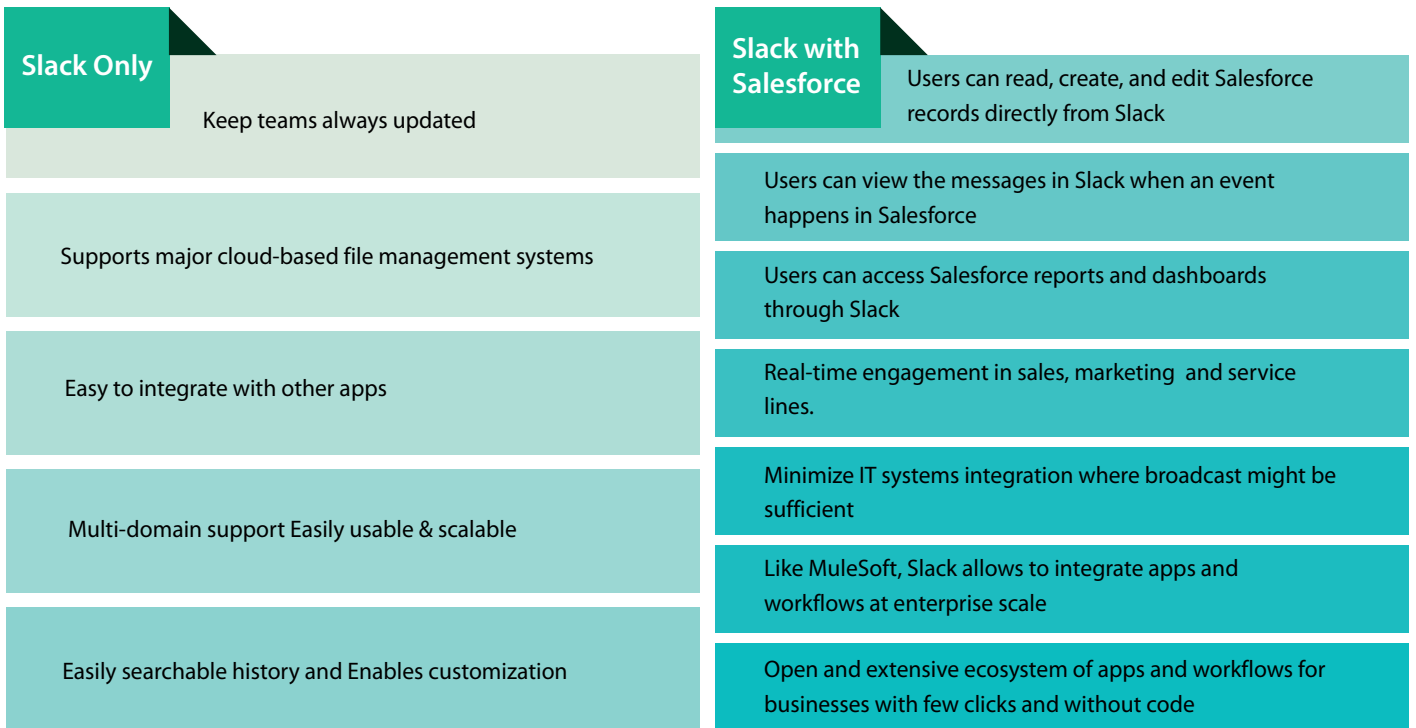| Slack Only	Slack with Salesforce
Keep teams always updated	Users can read, create, and edit Salesforce records directly from Slack
Supports major cloud-based file management systems	Users can view the messages in Slack when an event happens in Salesforce
Easy to integrate with other apps	Users can access Salesforce reports and dashboards through Slack
Multi-domain support Easily usable & scalable	Real-time engagement in sales, marketing and service lines.
	Minimize IT systems integration where broadcast might be sufficient
	Like MuleSoft, Slack allows to integrate apps and workflows at enterprise scale
Easily searchable history and Enables customization	Open and extensive ecosystem of apps and workflows for businesses with few clicks and without code

Figure 2 – Slack benefits both in a silo as well as in conjunction with Salesforce and other connected apps

Slack-First Service: Service operations can provide just-in-time customer care by looping customers directly into the Slack channel. Service agents get access to case details, specialists, and channels through swarms in Slack[2]. This results in an 11% reduction in case resolution time.[5] Innovations such as the "expert finder" feature can robotically identify staff who can help with high-priority cases based on availability, bandwidth, and skills.

Slack-First Sales: Slack integrated with Salesforce gives sales agents the ability to team up on opportunities in real-time

and from anywhere with "digital deal spaces." According to a report by Forrester, sales people using Slack see 15% faster sales cycles on average.[6] Automated daily briefings provide sales reps with a personalized list of tasks, meetings, and deals.

Slack-First Marketing: Slack and Salesforce provide agency partners and marketing teams with a shared workspace where Datorama details can be accessed in Slack.[7] Marketing agencies can team up on customer journeys to get AI-driven insights. These marketers are also notified

of journey updates and approvals via Slack channels.

Slack-First Analytics: Salesforce and Slack enable executives to quickly access all key trend reports and dashboard insights directly within Slack via the Watchlist Digest. Salesforce supports embedding Tableau CRM reports directly to Slack channels to ensure external, lean users have access to business insights and KPIs in Slack.

Beyond core offerings, Salesforce and Slack are working on many more Slack-first offerings across the eco system.
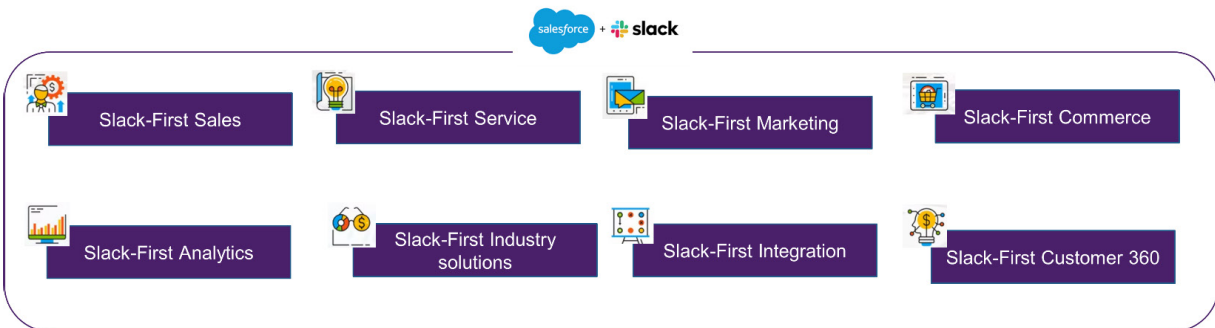

Figure 3 – Slack – first offerings from Salesforce

Salesforce has also acquired Troops.ai, which acts as a connector between Salesforce and Slack. Its purpose is to accelerate Slack's offerings to Salesforce and increase productivity by monitoring and delivering action able insights with workflows—all within Customer 360.

Impact factor to system integrators: investments and benefits

How the merger will transform the SaaS sector

The next step forward is in the development of customized workflows that connect multiple business applications, people, and processes within a large organization. Such workflows will need PaaS-related products (database and execution environment) to help with development like Salesforce's Heroku.8

Systems integrators can develop key workflows that blend well with the Slack user interface and with Salesforce's core areas of marketing, finance, and sales data.

The merger of Salesforce and Slack creates an ecosystem that is a competitor to Microsoft Teams and related products. Salesforce-Slack complements each software's key attributes and is a reiteration of the value propositions they both possess. The merger will evolve towards the reforming of the SaaS landscape.

The Slack-First Platform enables low-code creation of applications and workflows in Slack. With Slack APIs and SDK, system integrators can create complex workflows and custom applications to complete the end-to-end automation of digital business processes.

There will be Slack integrations with MuleSoft (Salesforce's platform for data integration) and Quip (Salesforce's collaborative documentation suite), which will compete with Google Workspace and Microsoft Office365.

System integrators can also help their customers in engagement functions integration via Salesforce CRM and Slack APIs or third-party connectors:

- Zapier and Automate.io are powerful tools for integrating. They integrate multiple systems using granular rules and filters.

- Troops.ai is another recent acquisition by Salesforce to expedite a tighter Slack-Salesforce integration.

System integrators can combine the power of Salesforce's AI platform (Einstein), with Slack's seamless bot experience to build integrated and intelligent troubleshooting bot[s].

Customers' business processes often involve an approval mechanism. Here too, Slack provides solutions. system integrators will be able to build workflow approvals in Slack so that records are automatically updated in the Salesforce record.

Security at Slack is already extensive and comparable to that of Salesforce, be it at Infra, network, PaaS, or SaaS levels. Slack has decent application security coverage of all touch points. System integrators often set these security settings for their customers as part of Slack-based solution rollouts to meet the following requirements:

1. Compliant to various industry certifications and regional data residency- related legal requirements

2. Has AWS-based BYOK to encrypt messages and files at rest and transit

3. Has EMM to apply mobility policy over accessing Slack on the move

4. Administrative and channel/ workspace-centric security and visibility controls

In summary, system integrators can provide more value to enterprises with Slack, whether through Slack setup, Slack rollouts, Slack security establishment in the customer's context, Slack workflows and app building, extending Slack capabilities via API, integrating light weight apps via the Slack engagement layer instead of MuleSoft or heavy integration layers, Slack-based IDP/ SSO setup, Slack-based DevOps setup for project management, Slack-based AppExchange apps for distribution, and much more.

Slack integration with core sales, service, marketing, and analytics clouds opens innumerable use cases for a two-way, seamless integration full of contextual insights. It's an integration where system integrators can bring their rich domain and implementation experiences to roll out smarter solutions in this space.

A Slack-first approach in Salesforce industries will help system integrators, domain consulting, and technology consulting groups work deeper in Slack-led Salesforce industries-based solutions, such as Health Cloud care coordination for Slack, Financial Services Cloud for Slack, Commerce Cloud for Slack, and many more industry verticals.

Infosys as a salesforce slack implementation partner

Within the Infosys Salesforce practice (Infosys, Simplus, and Fluido) we already use Slack for cross-collaboration to manage sales opportunities, knowledge sharing, document management, and account-specific delivery coordination. Slack is also our go- to tool within the Salesforce practice for various training, certifications, and competence- building exercises.

Infosys provides a holistic and structured approach towards Slack-centric digital transformation for enhanced customer experiences through the following offerings:

Infosys possesses key differentiators that make it the right implementation partner for Salesforce - Slack:

- Provides quality-centric and value-driven implementations using solutions which are part of Infosys Cobalt.[3]

- Leverages a robust enablement platform through a center of excellence.

- Proven implementation experience, as demonstrated by various published points of view and case studies, allowing previous lessons learned to apply to new Slack-centric use cases while rolling out communities .

- Strong collaboration with Salesforce, leveraging their combined strength to steer industry-specific digital transformations with Slack for smarter and more engaging customer management.
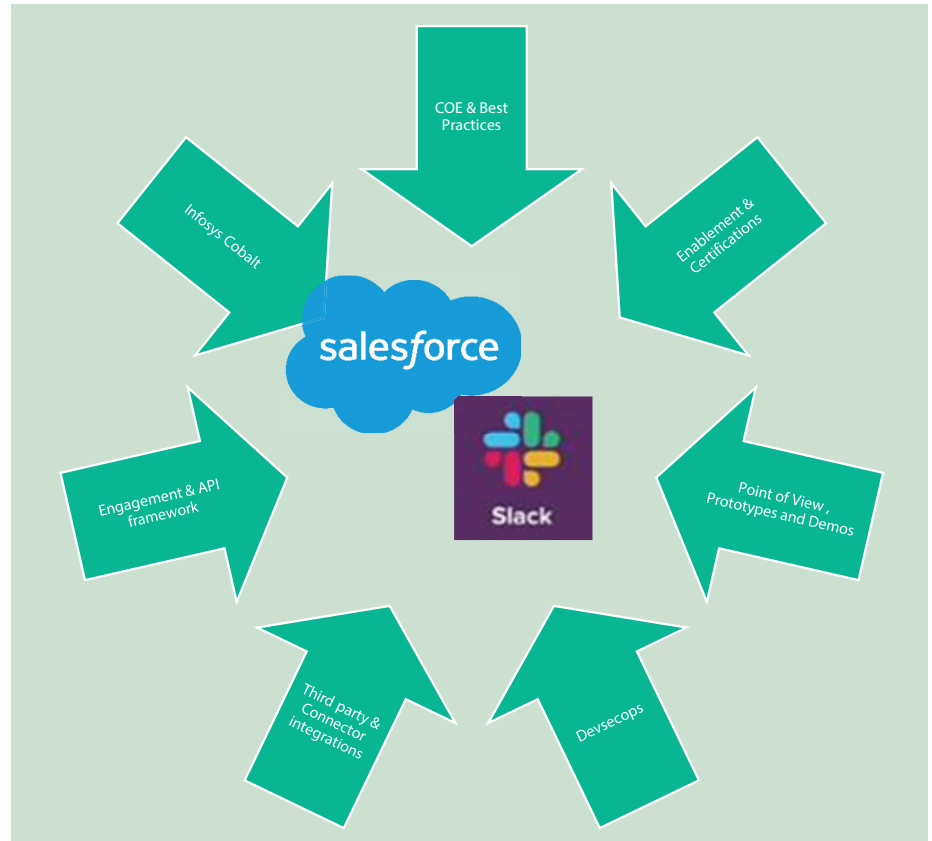

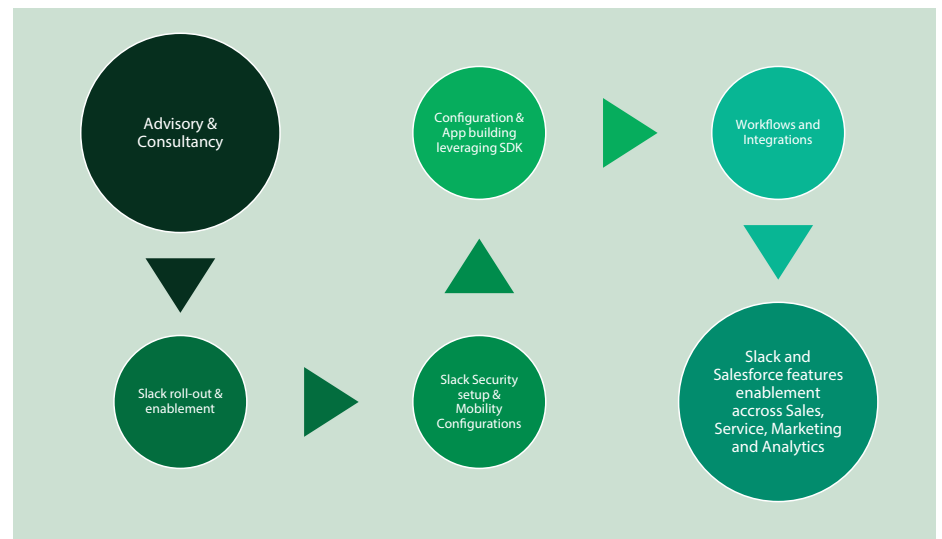Figure 4 – Infosys''Salesforce-Slack engagement layer' offering in cloud CX

Figure 5 – Infosys offerings: Salesforce- and Slack-based solutions

Conclusion

The post-pandemic new normal of hybrid workforces supported by 'Slack on Salesforce' is a new work stream to integrate and a boon for thin users.

Almost all industries are embracing integrated platforms that enable them to shift into a digital-first business model. Scalable platforms such as 'Slack on Salesforce' act as the central nervous system helping organizations in their shift and stabilizing organizations in the post-pandemic world.

The engaging solutions in this area are a hybrid cloud stack used to enable IT across all businesses with increased productivity, integration, and collaboration.

Slack, when used with Salesforce, helps enterprises increase user acceptance of new offerings and establish stronger employee, customer, partner, and constituent interactions through onboarding, leadership engagement, training, opinion monitoring, and more.

The combined power of Salesforce + Slack drives growth…

- For product vendors in terms of net worth licenses sold, Salesforce upgrades, and maximum time spent by users on the core platform.

- For system integrators in building new solution models and use cases around productivity- and collaboration-centricity across the Salesforce core and Salesforce industries.

- For customers in improved collaboration and productivity covering their heavy and thin user bases.

This is just a beginning, and we system integrators are hopeful about innumerable possibilities this 27-billion-dollar Salesforce-Slack deal is going to bring into the digital ecosystem.

About the Author

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Dr. Thejasvi Nagaraju has nearly twenty years of experience in domain consulting and platform advisory services for cloud-based enterprise applications. He is closely associated with Salesforce based digital transformation journeys and is passionate about digital engagement platforms and its innumerable possibilities in bringing people, process, and applications together in CX space.

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