

Slack for Team Productivity — Workbook

This workbook turns the course into a finished Slack operating system for your team. Work through one section per module: you will map and rename your channels, dial in your notifications, build three live automations, and stand up the norms and metrics that keep the noise down. Keep your completed worksheets pinned in a #help-slack or #team-operations channel so the whole team can use them.

Architecting a Workspace That Scales

Inventory your current channels, design a prefix-based taxonomy, and decide what to keep, rename, or archive.

Worksheet: Channel Inventory and Re-Map

List every current channel, then assign each a new prefixed name and a decision. Use prefixes team-, proj-, help-, social-, ext-, announce-, feed-. Mark anything quiet for 30+ days as Archive.

Current channel name

What it is actually used for (one line)

Public or private (and is private justified?)

Last activity (this week / this month / 30+ days)

New prefixed name

Decision (keep / rename / merge / archive)

Exercise: Design Your Prefix Legend

Write the canonical prefix list your team will use, with one real example channel for each. You will pin this in your operations channel.

- Which prefixes does your team actually need (start from team-, proj-, help-, social-, ext-, announce-, feed-)?
 - Write one real example channel name per prefix that already exists or should exist.
 - Which two existing channels most violate the convention, and what will you rename them to?
 - Where will the legend live, and who owns keeping it current?
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Checklist: Workspace Foundation Setup

- Every active channel has a one-line topic and a fuller description
- Channel names are lowercase, hyphenated, and under ~21 characters
- Prefix legend is written and pinned in #help-slack or #team-operations
- All channels quiet for 30+ days have an archive warning posted
- Default-to-public principle is documented for the team
- Duplicate or near-duplicate channels are identified for merging

Taming Notifications and Protecting Focus

Reset your personal notification model, choose high-signal keywords, and set up focus and status routines.

Worksheet: Personal Notification Plan

Decide your notification level for each channel and define your focus and quiet hours. Fill this in inside Slack's Preferences as you go.

Global default level (recommended: Mentions and keywords)

Channels set to All new messages (max two — name them)

Channels to mute entirely (social and firehose)

Badge setting (all unread / only mentions and DMs)

Daily focus block for Do Not Disturb (start and end time)

After-hours DND schedule (evenings and weekends)

Exercise: Choose Your Highlight Words

Select 5 to 10 precise keywords so Slack surfaces only the topics you own, even in muted channels. Avoid words so common they recreate noise.

- Which projects, products, or accounts do you personally own?

- Which risk words must you never miss (e.g. outage, refund, churn, legal)?

- Which broad words (like 'help' or your company name) should you deliberately NOT add, and why?

- Which two channels will you now mute because your keywords will catch what matters?

Exercise: Status Legend and Schedule-Send Habit

Define a shared status vocabulary the team can read at a glance, and commit to a schedule-send rule for off-hours messages.

- Write your team's 4 to 6 standard statuses and what each one means about reply expectations.

- Which statuses should auto-clear, and after how long?

- What is your personal rule for when to use Schedule Send instead of sending now?

- Is your local time zone shown on your profile so colleagues can self-serve?

Checklist: Focus and Notification Hygiene

- Global notifications set to Mentions and keywords
- No more than two channels set to All new messages
- 5 to 10 highlight words configured and tuned
- App badge set to count only mentions and DMs
- Recurring after-hours Do Not Disturb schedule is active
- Later (saved items) used as the inbox for alerts that arrive mid-task

Automating the Repetitive with Slackbot and Workflows

Capture your repeat questions for Slackbot and build three working Workflow Builder automations.

Worksheet: Slackbot Response Library

Log the questions your team asks repeatedly, then write the trigger phrase and auto-response for each. Configure these under Customize Slack, then Slackbot.

Repeated question (in the team's own words)

How often it comes up (daily / weekly / monthly)

Trigger phrase to listen for

Slackbot response (text and/or link)

Owner of the answer (who keeps the link current)

Exercise: Build the Async Standup Workflow

Plan your scheduled standup before you build it in Workflow Builder, then publish it. Use the Scheduled date and time trigger.

- Which channel will collect the standup answers, and at what time does it run?

- Which three form questions will you ask (default: yesterday, today, blockers)?

- Who are the participants, and which days does it run?

- What human time per day does this reclaim versus a live standup meeting?

Exercise: Design a Request-Intake Workflow

Plan a link-triggered intake form that gives one clean front door for requests to your team.

- Which team or function needs structured intake (e.g. design, IT, people ops)?

- Which form fields do you need (request type, description, due date, priority, link to brief)?

- Which help- channel receives the formatted submission?

- Where will you pin the start link so it is the only way to make a request?

Checklist: Automation Launch Checklist

- Top repeat questions logged and Slackbot responses configured
- /remind set up for at least one recurring personal or team task
- Scheduled async standup workflow published and verified on its first run

- [] Request-intake workflow built and its start link pinned
- [] Onboarding welcome workflow set on the new-member-joins trigger
- [] Each automation has a named owner who maintains it

Building an Async-First Culture and Measuring It

Write the team charter, curate integrations, and stand up a weekly audit to prove the noise is falling.

Worksheet: Team Communication Charter

Draft your one-screen charter. Fill each field, then paste the result into a pinned message in #help-slack.
Default channel response-time expectation

Direct-mention response-time expectation

True-emergency escalation path (not Slack)

After-hours expectation (state plainly: none)

Threading rule

@here / @channel usage rule

Public-by-default and DM-justification rule

nohello / complete-message rule

Exercise: Curate Your Integrations

Choose a small, high-value set of apps and assign each its own dedicated channel so no integration interrupts human conversation.

- Which 3 to 5 integrations would genuinely help your team (calendar, drive, polls, video, time-off)?
- For each, which single dedicated feed- channel will receive its messages?
- Which channels will you mute after connecting the app?
- Which currently installed apps does nobody use and should be removed?

Worksheet: Weekly Audit Tracker

Run this 15-minute audit each week using Slack's analytics dashboard and record the numbers to watch the trend.

Week of

Public-channel share of messages (%)

DM share of messages (%)

Active channel count

Channels flagged for archive this week

Channels archived this week

Did standup and intake workflows run? (yes/no)

One improvement to make next week

Checklist: Culture and Measurement Setup

- One-screen communication charter written and pinned
- Response-time expectations agreed and visible to the whole team
- Integrations limited to a curated set, each in its own muted channel
- Analytics dashboard reviewed and baseline numbers recorded
- Weekly 15-minute channel audit scheduled with a named owner
- Charter and prefix legend set for quarterly review

Your Action Plan

1. Day 1: Run the Channel Inventory worksheet and post archive warnings on every channel quiet for 30+ days.
2. Day 2: Publish your prefix legend, rename the worst-offending channels, and merge duplicates.
3. Day 3: Reset your own notifications to Mentions and keywords, set 5 to 10 highlight words, and turn on an after-hours DND schedule.
4. Day 4: Configure Slackbot responses for your top repeat questions and set your first /remind for a recurring task.
5. Day 5: Build and publish the async standup workflow; verify it on the next morning's run.
6. Day 8: Build the request-intake workflow and pin its start link as the single front door for your team.
7. Day 9: Set up the onboarding welcome workflow on the new-member-joins trigger.
8. Day 10: Draft and pin the one-screen communication charter; walk the team through it.
9. Day 11: Curate integrations into dedicated muted feed- channels and remove unused apps.
10. Day 12 and weekly thereafter: Run the 15-minute channel audit, record the metrics, and log one improvement.

