Slack workflows

Funnel

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funnel

Our #1 task workflow

"I'm on it"

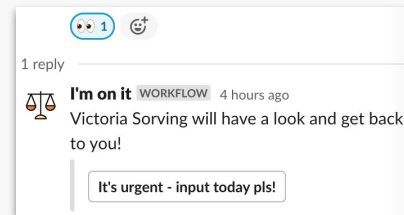Adding 👀 to any post in a predefined channel triggers:

1. an automated message "I'm on it"; and

2. automatically adds the post contents and a link to the post as an assigned Asana task
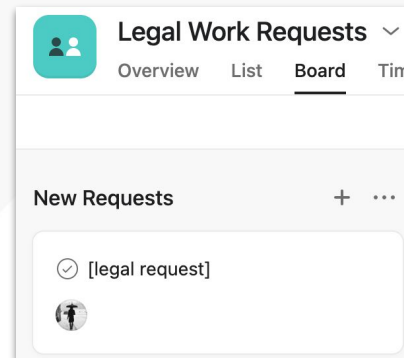
One click:

→ confirms receipt and who'll take action

→ ensures coordination in team

→ enables keeping track of Slack posts for follow-up

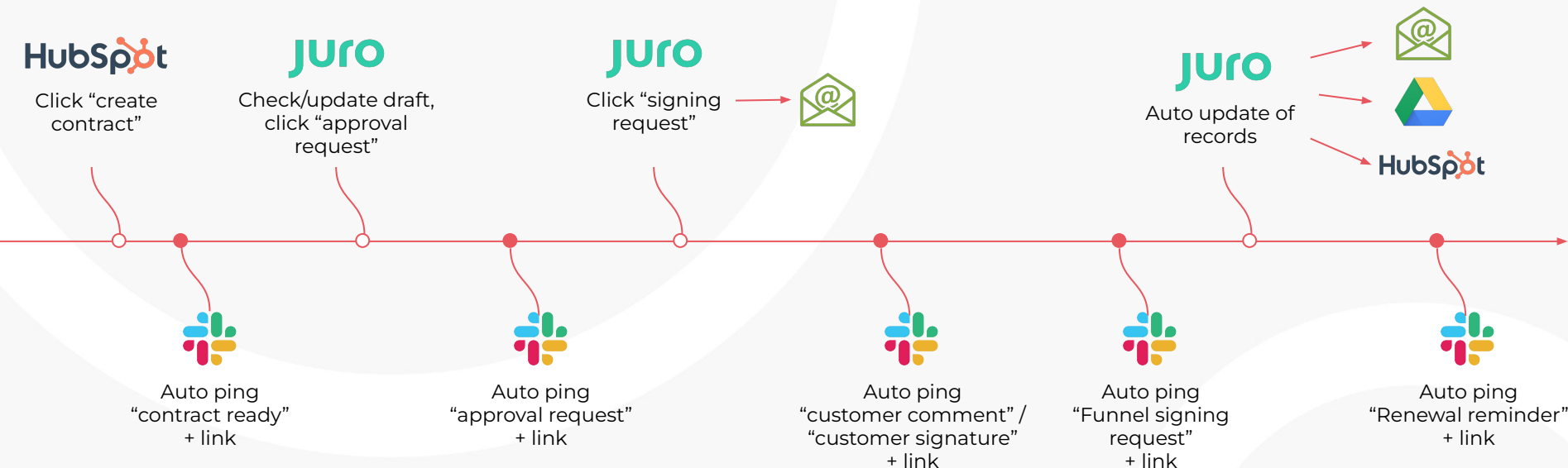→ enables automated reporting on tasks in Asana

Our #1 contract workflow

Customer contracts

HubSpot
Click "create contract"

JURO
Check/update draft, click "approval request"

JURO
Click "signing request"

JURO
Auto update of records

Auto ping "contract ready" + link

Auto ping "approval request" + link

Auto ping "customer comment" / "customer signature" + link

Auto ping "Funnel signing request" + link

Auto ping "Renewal reminder" + link

slack   zapier   JURO   HubSpot   G Suite   funnel
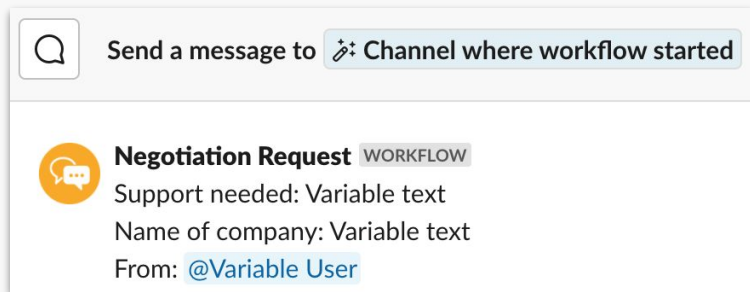
FAQ workflows

Reply by emoji

🔍 → auto reply with context on question and link to a customer FAQ pdf to share

💼 → auto reply informing it being a question for the Finance team, reference to #finance

🕵️ → auto reply on it being a data subject request with a link to an Asana form to fill out

… and loads more

Defining format for requests

Slack shortcut workflow

→ easy in Slack set-up

→ transparency in channel

→ users of workflow need access to channel

Google forms → predefined channel

→ Forms → zapier → slack, but more flexible

→ can select high-level information for Slack, e.g. for approval/confidentiality

→ users of workflow do not need access to channel

@funnel