December 2, 2025 - TechSoup Connect Canada

CREATE AND OPTIMIZE NONPROFIT WORKFLOWS IN SLACK

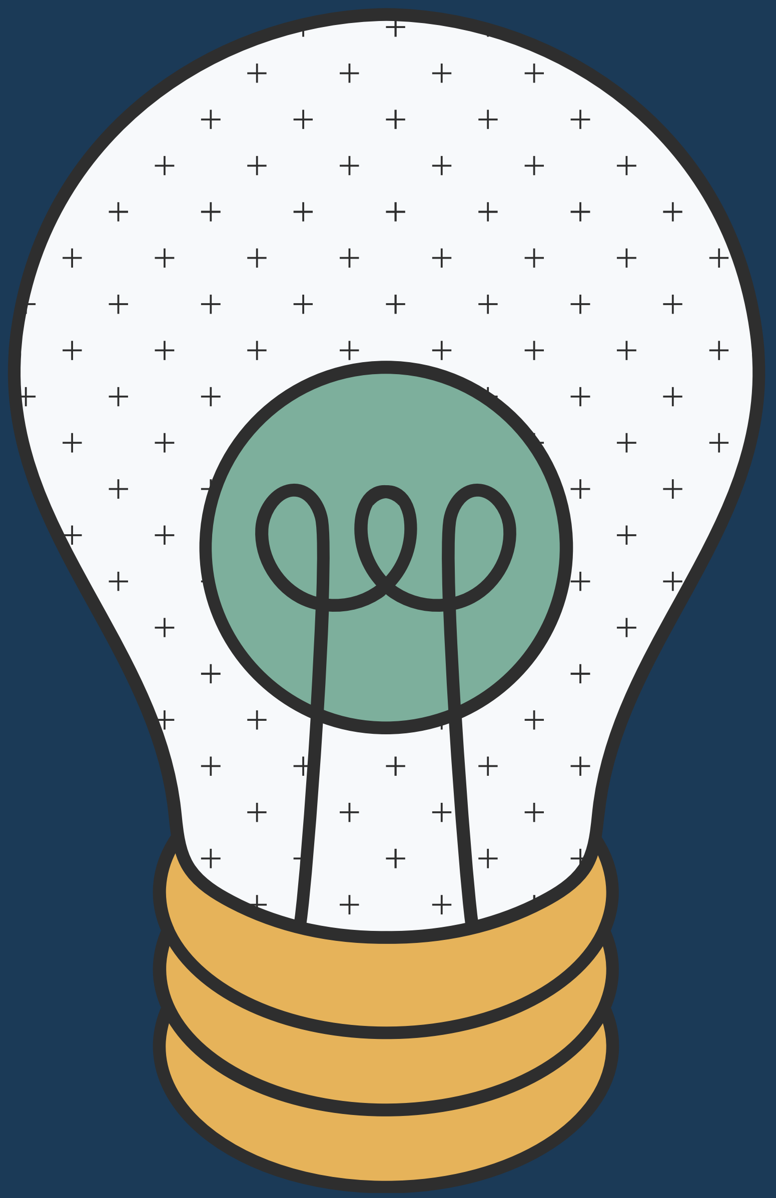
START AUTOMATING YOUR ROUTINE AND REPETITIVE TASKS IN SLACK TODAY!

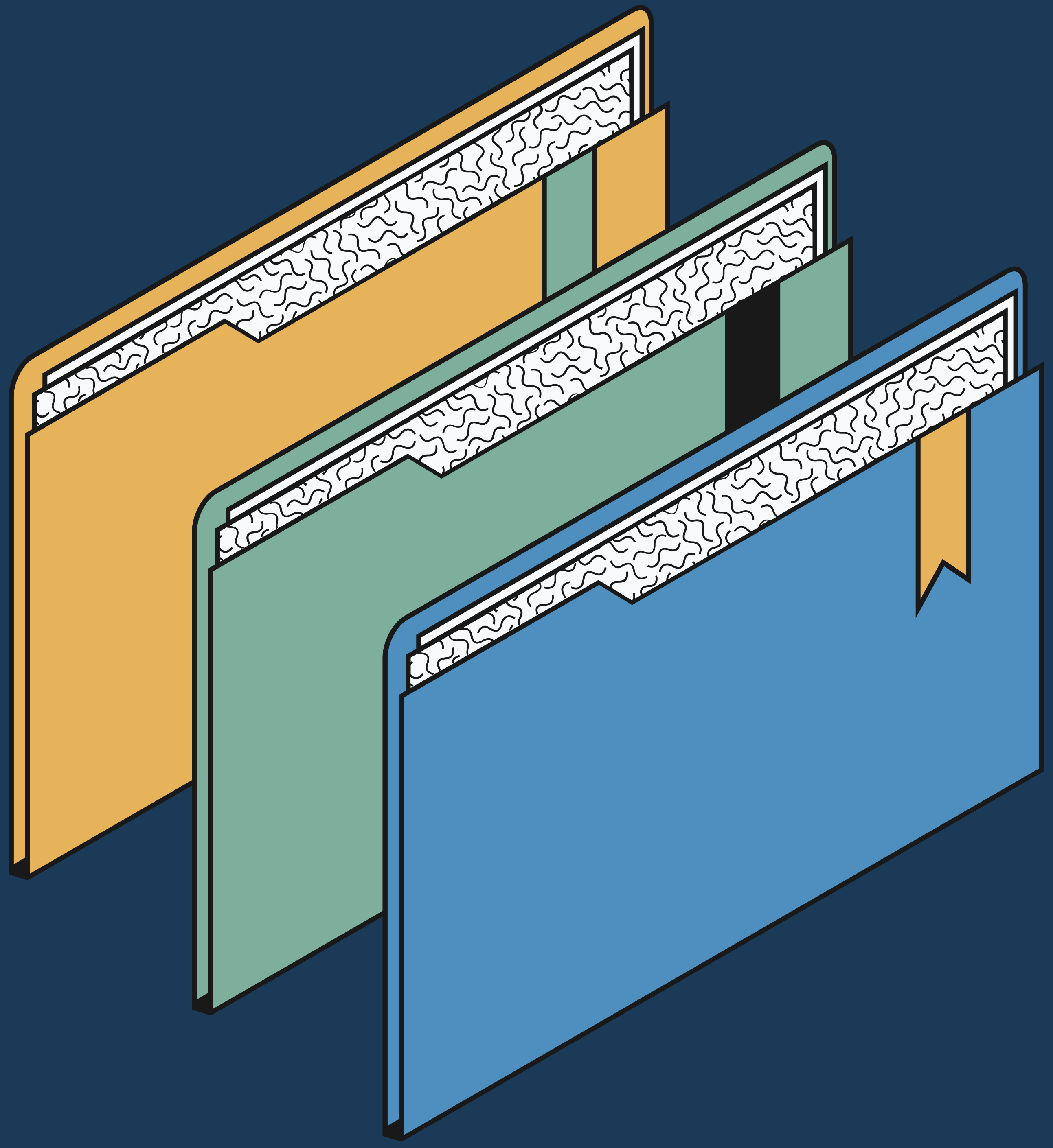
BY THE END OF THIS WORKSHOP...

I hope you will be **inspired** and well on your way to **automating your routine and repetitive tasks in Slack!**

Today, we will:

- Learn about what kinds of nonprofit workflows are ideal for Slack
- See real nonprofit workflows in action
- Come away with templates and inspiration to start automating with Slack Workflows!





AGENDA

TODAY, WE WILL COVER:

- INTRODUCTION
- CORE CONCEPTS & REQUIREMENTS
- DEMOS
- Q&A
- APPENDIX - MORE EXAMPLES YOU CAN USE!

STEPHEN LAVERY

BRIDGING MISSION AND TECHNOLOGY FOR GREATER IMPACT

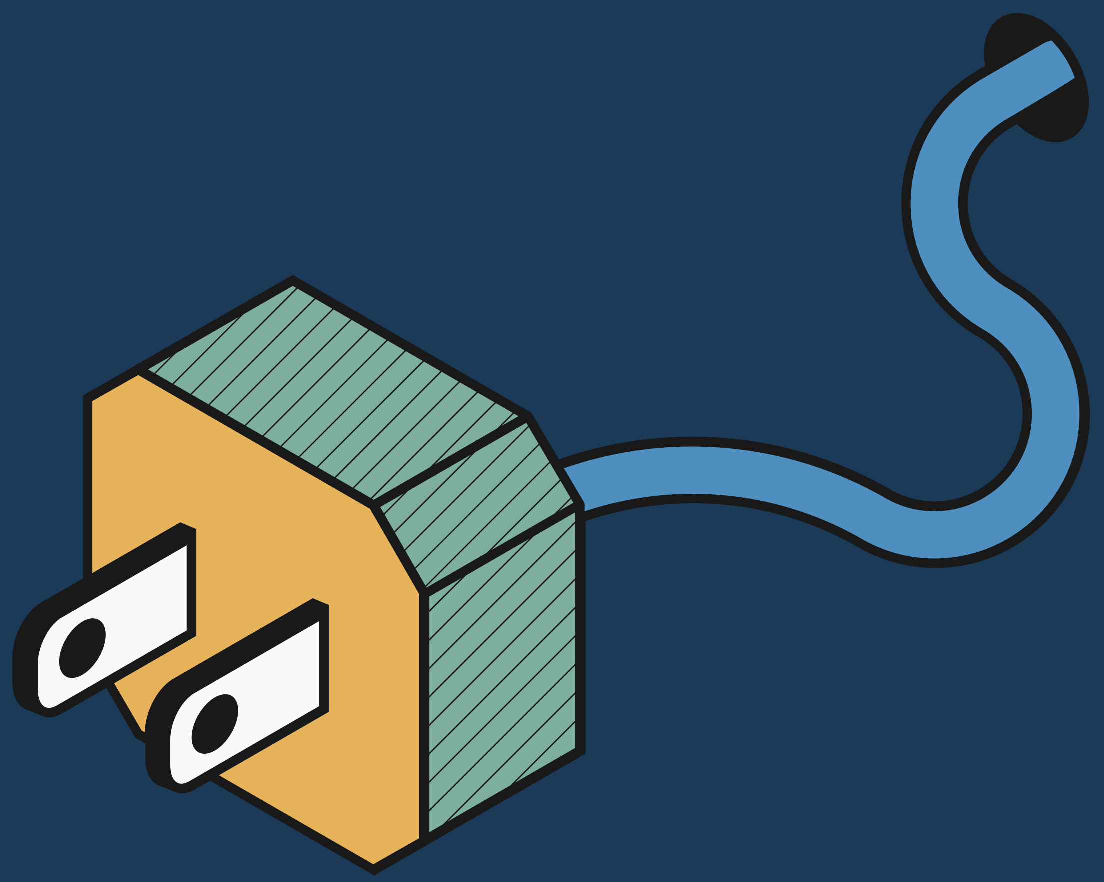
10+ years experience leading digital transformation in philanthropy and 20 years experience in nonprofits. Some of the places I've been:

- **Community Foundations of Canada** - Manager, Operations & Systems
- **Grantbook** - Philanthropy Tech Project Manager & Fluxx People Lead
- **McGill University** - MBA (Strategy & Analytics) Class of 2021
- **Commonwealth Corporation** - Business Process Manager
- **Jumpstart** - National Education & Program VISTA
- **New York City Department of Education** - 3rd & 4th Grade Teacher

FOLLOW ALONG!

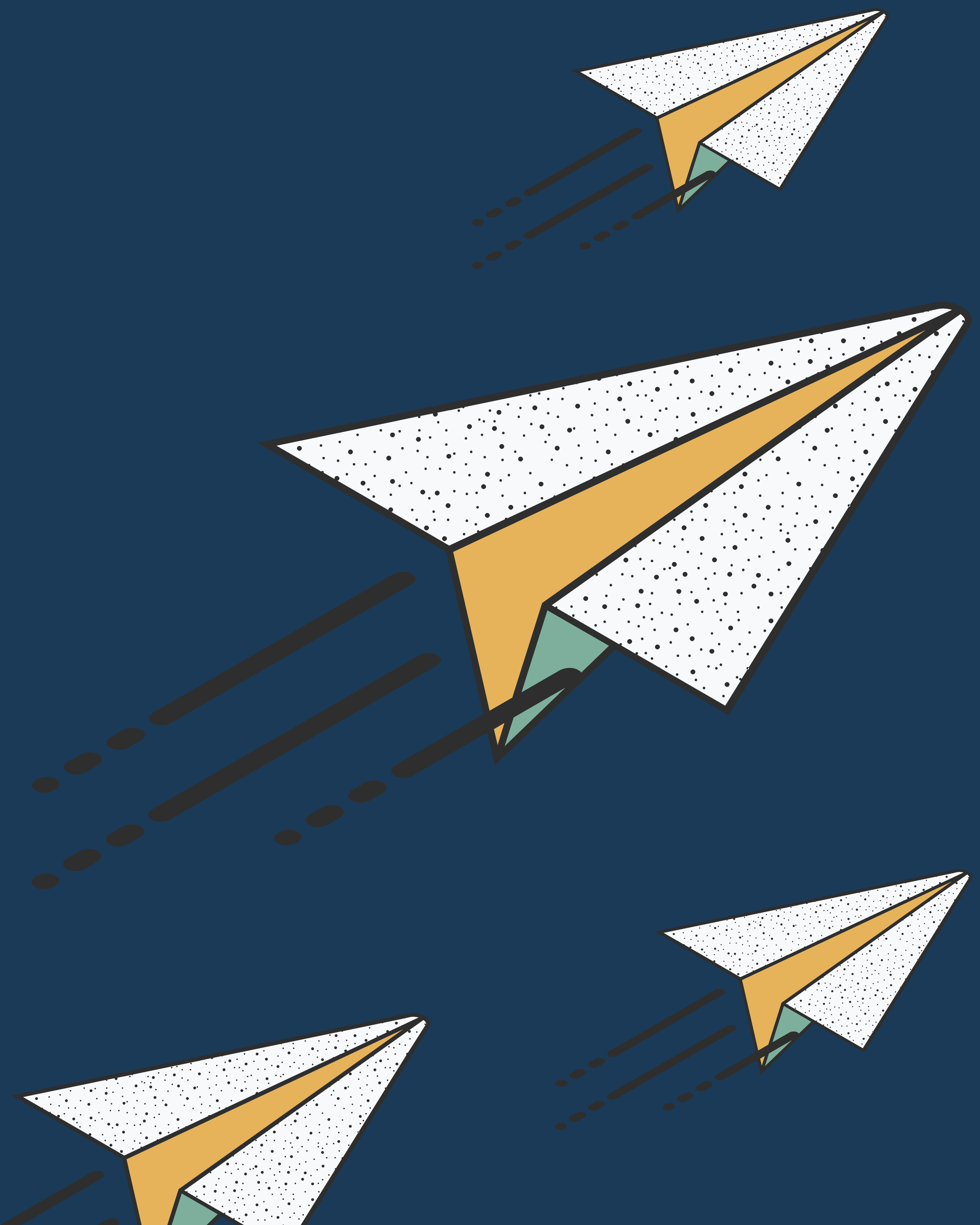
Here are a few things you can do now to get set up so you can follow along when we look at use cases:

- Log into Slack
- Create a private channel to test in
- Check and see that you have the ability to create Slack Workflows



SHARE IN THE CHAT

What’s a routine or repetitive task you do just about every week or month in Slack?

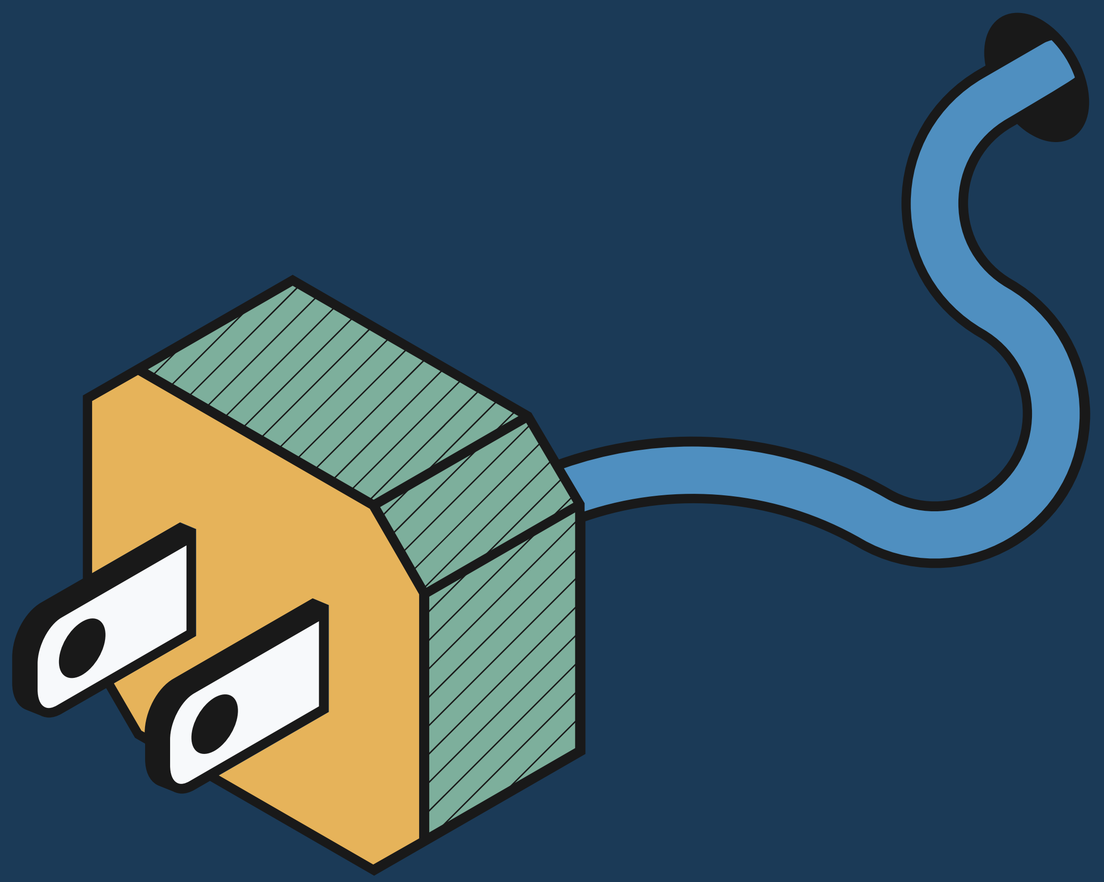


CORE CONCEPTS & REQUIREMENTS

WHAT IS AUTOMATION?

Automation means using software to complete routine, repetitive tasks that would otherwise require manual effort.

The goal is to streamline operations and remove repetitive and manual work so you can focus on delivering on your mission!



Benefits

- Save time
- Eliminate processing errors
- Never miss a task

WHY AUTOMATE IN SLACK?

- **Collaboration** - Your team already works in Slack, so build your workflows where conversations, decisions, and updates already happen
- **Simplicity** - Slack Workflows are a no-code solution that anyone can implement - perfect for small teams without dedicated IT support
- **Visibility** - Automations happen right in team channels, so everyone sees them
- **Quick Wins** - Automate small, high-frequency tasks in just a few minutes to make daily work smoother
- **Integration** - Slack integrates with dozens of other tools you may already use, meaning you can use Slack as your automation hub

REQUIREMENTS

WHAT DO YOU NEED TO GET STARTED WITH SLACK WORKFLOWS?

WHO CAN CREATE SLACK WORKFLOWS?

Any user on a paid plan can create workflows using Workflow Builder by default. This could be restricted by a workspace owner or admin, so check with your admin to be sure.

WHAT PLANS INCLUDE SLACK WORKFLOWS?

Slack Workflows are available on **all paid plans** (Pro, Business+ & Enterprise+).

REQUIRED COMFORT LEVEL

If you can build a Google Form, you can build a Slack Workflow.

DEFINITIONS

Trigger - Action or event that starts a workflow.

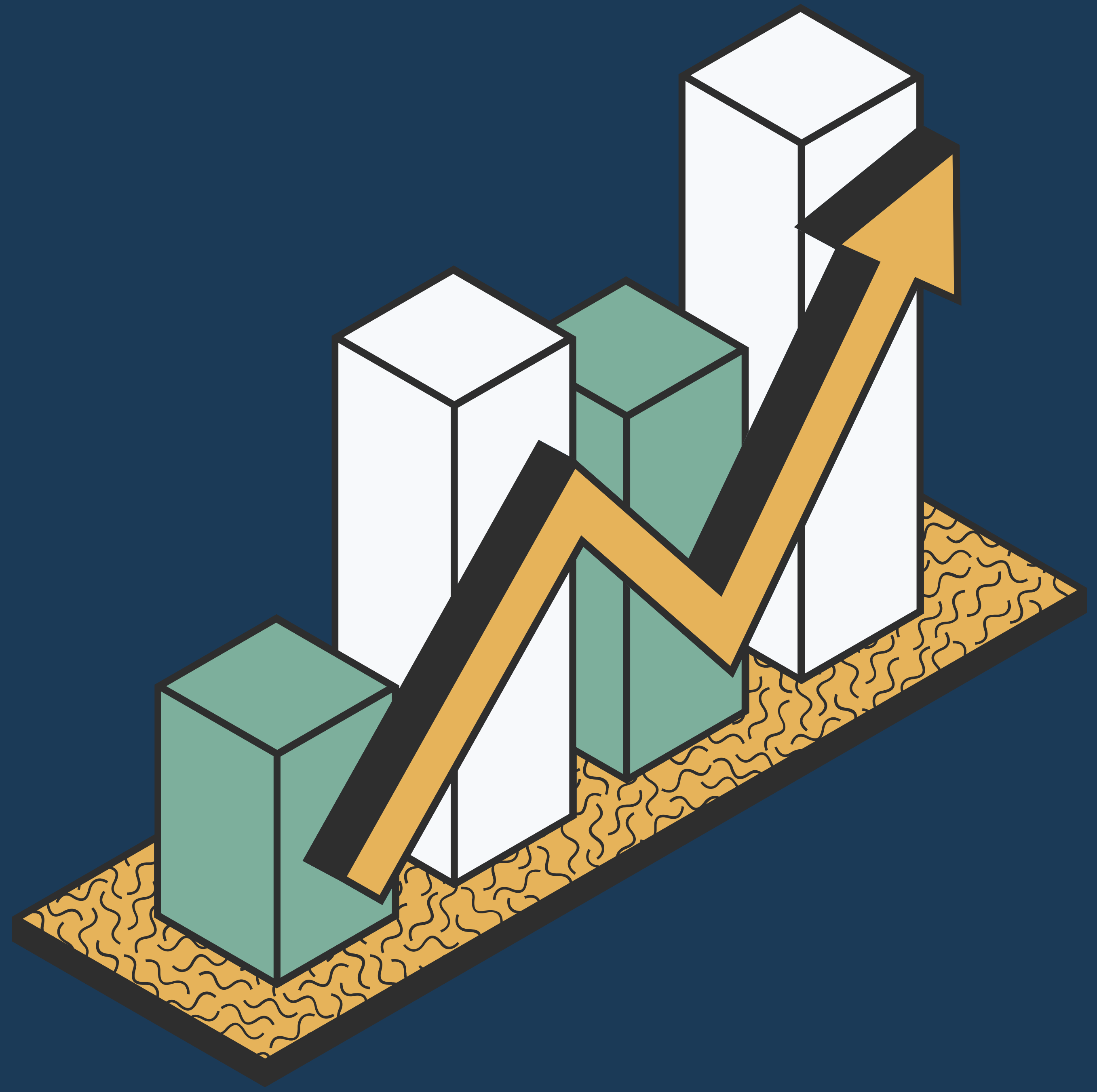
Steps - Actions your workflow takes after the trigger starts the process.

Variable - Information submitted to your workflow that can be referenced in steps that come later in the workflow.

TICKETING WORKFLOW – VISUAL OVERVIEW

User clicks a button	User fills out a form	Message posts to #tech-requests	(Optional) Log to Google Sheet	Team reviews & responds
Team member clicks a button in the #tech-requests channel to get started	Team member fills out Slack form with request details	Team sees details, urgency, and deadline at a glance	Workflow adds the request to a tracking spreadsheet to track and report on later	Anyone on the team replies in the thread

DEMO



Stephen Lavery

AUTOMATION PREP
Checklist

1. DESIGN

- [ ] Define the goal
- [ ] Identify who is involved
- [ ] Map the workflow steps: trigger > actions > outcome
- [ ] Confirm you have the right permissions

2. BUILD

- [ ] Use clear, descriptive workflow names and form titles
- [ ] Customize messages to reflect your desired tone and voice
- [ ] Have one clear action per step
- [ ] Choose the right channel visibility

3. TEST

- [ ] Make sure every step works as expected
- [ ] Check variable fields to make sure they populate correctly
- [ ] Confirm that notifications go to the right people
- [ ] Ask your co-workers to test it and give you feedback

4. LAUNCH!

- [ ] Announce your new workflow to the team
- [ ] Communicate what it does and how to trigger it
- [ ] Create a quick demo video or GIF and pin it to the channel
- [ ] Gather feedback from users and iterate

DESIGN: AUTOMATED CHECK-INS

GOAL:

Keeping everyone aligned on daily or weekly priorities can be tough in busy orgs, especially when we work remotely or part-time. **Let's automate check-ins so updates happen consistently and transparently, without extra meetings.**

TRIGGER

- Scheduled Message - every Monday at 9:00 AM

STEPS

- Send a message to #[team channel] to remind everyone to share their updates

OUTCOME

- Everyone on the team posts their updates
- Team collaborates in Slack thread to remove blockers, celebrate wins

WORKFLOW: AUTOMATED CHECK-INS

Every Monday at 9 AM

Workflow triggers on a schedule - every Monday at 9 AM

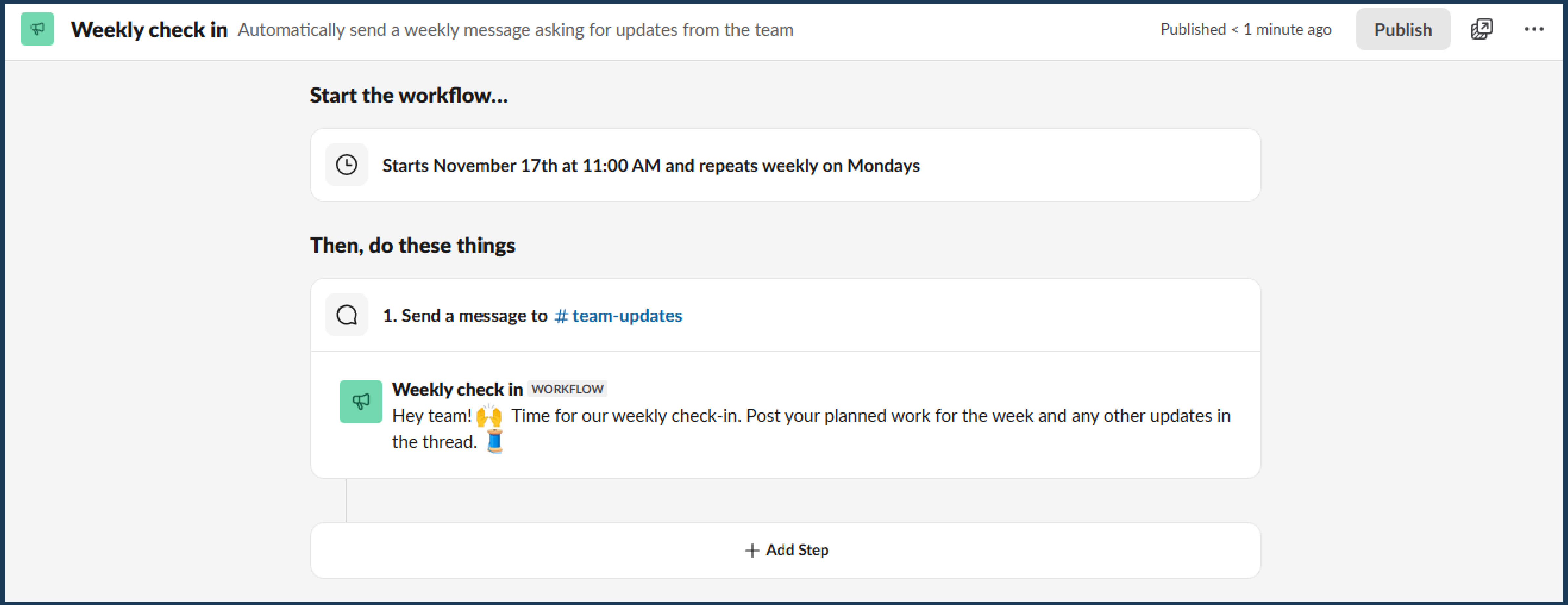
Message posts to #team-updates

Team is prompted to post their updates in the thread

Team reviews & responds

Everyone on the team replies in the thread

BUILD: AUTOMATED CHECK-INS



DESIGN: FLAG CONTENT FOR REVIEW

GOAL:

Great stories and quotes are shared in lots of channels, but sometimes they don't make it to the comms team for storytelling. **Let's make it easy and frictionless to share this content.**

TRIGGER

- React to any message with the :mega: emoji

STEPS

- Share a link to the original message in #comms
- Add the message to a story bank or content tracker

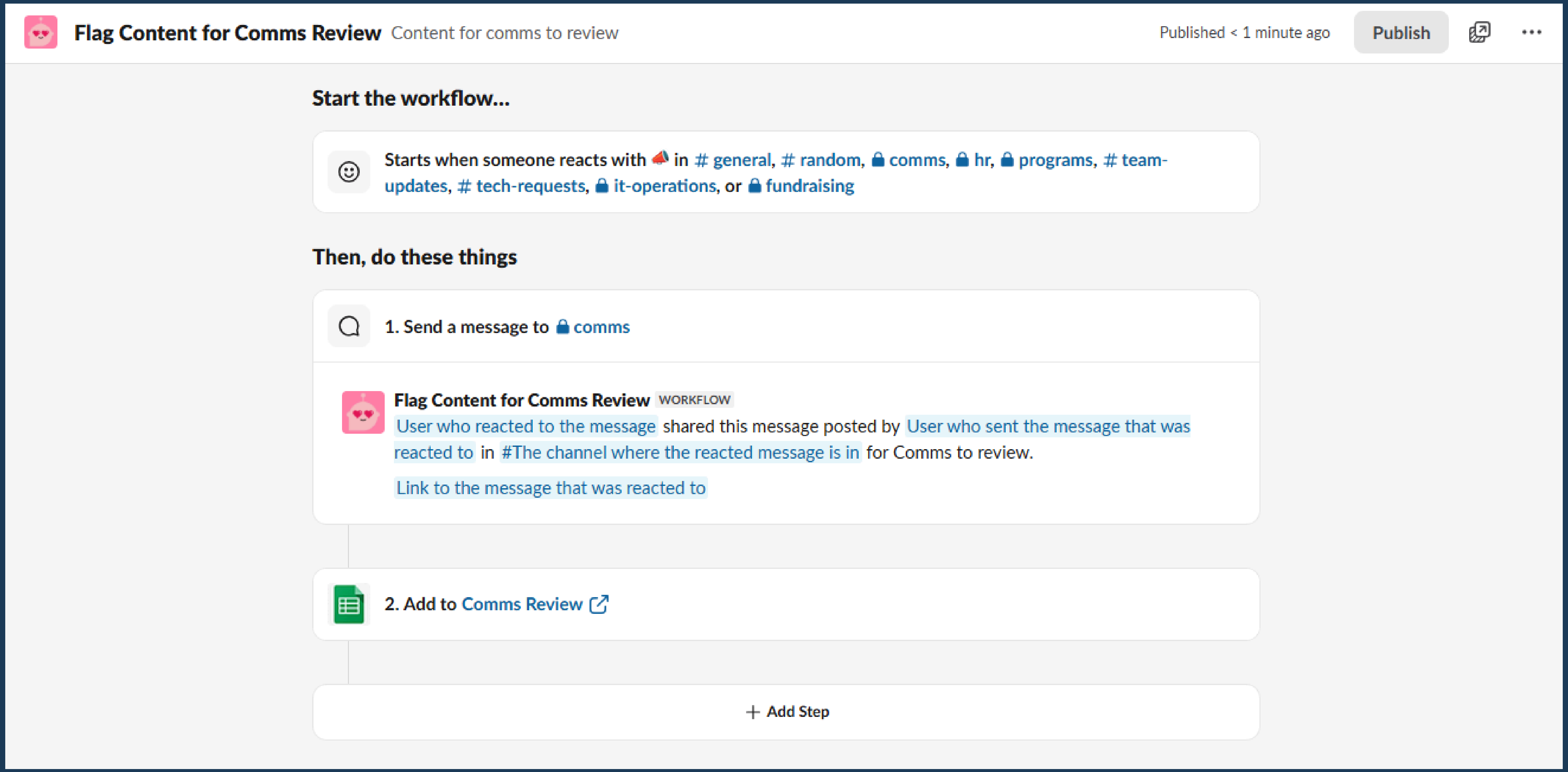
OUTCOME

- More stories collected
- Easier content planning for socials, website, reports
- Improved storytelling for fundraising

WORKFLOW: FLAG CONTENT FOR REVIEW

User reacts with :mega: emoji	Message posts to #comms	(Optional) Log to Google Sheet	Comms team reviews
Team member reacts to any message with the :mega: emoji	Comms team sees the original message in their team channel	Workflow adds the message to a spreadsheet to track content to be reviewed and incorporated into storytelling	Comms team reviews the content and decides how it can be incorporated

BUILD: FLAG CONTENT FOR REVIEW



DESIGN: REQUEST TICKETING SYSTEM

GOAL:

It's easy for help requests - like tech support, document translation, or other quick asks - to get lost in DMs, inboxes, or side chats. **Let's centralize them in a single Slack channel to keep everyone aligned, make progress visible, and help your team resolve requests faster.**

TRIGGER

- Submit a form accessed via a button or a link pinned to a shared #tech-requests channel

STEPS

- Collect request info in a form, including description, level of urgency, and deadline
- Send a message to #tech-requests
- Add requests to a List for tracking

OUTCOME

- Everyone uses standard process - ensuring nothing gets missed
- Requests are handled in a timely manner
- Anyone on the team can respond to request, empowering knowledge sharing and removing bottlenecks

WORKFLOW: REQUEST TICKETING SYSTEM

User clicks a button

Team member clicks a button in the #tech-requests channel to get started

User fills out a form

Team member fills out Slack form with request details

Message posts to #tech-requests

Team sees details, urgency, and deadline at a glance

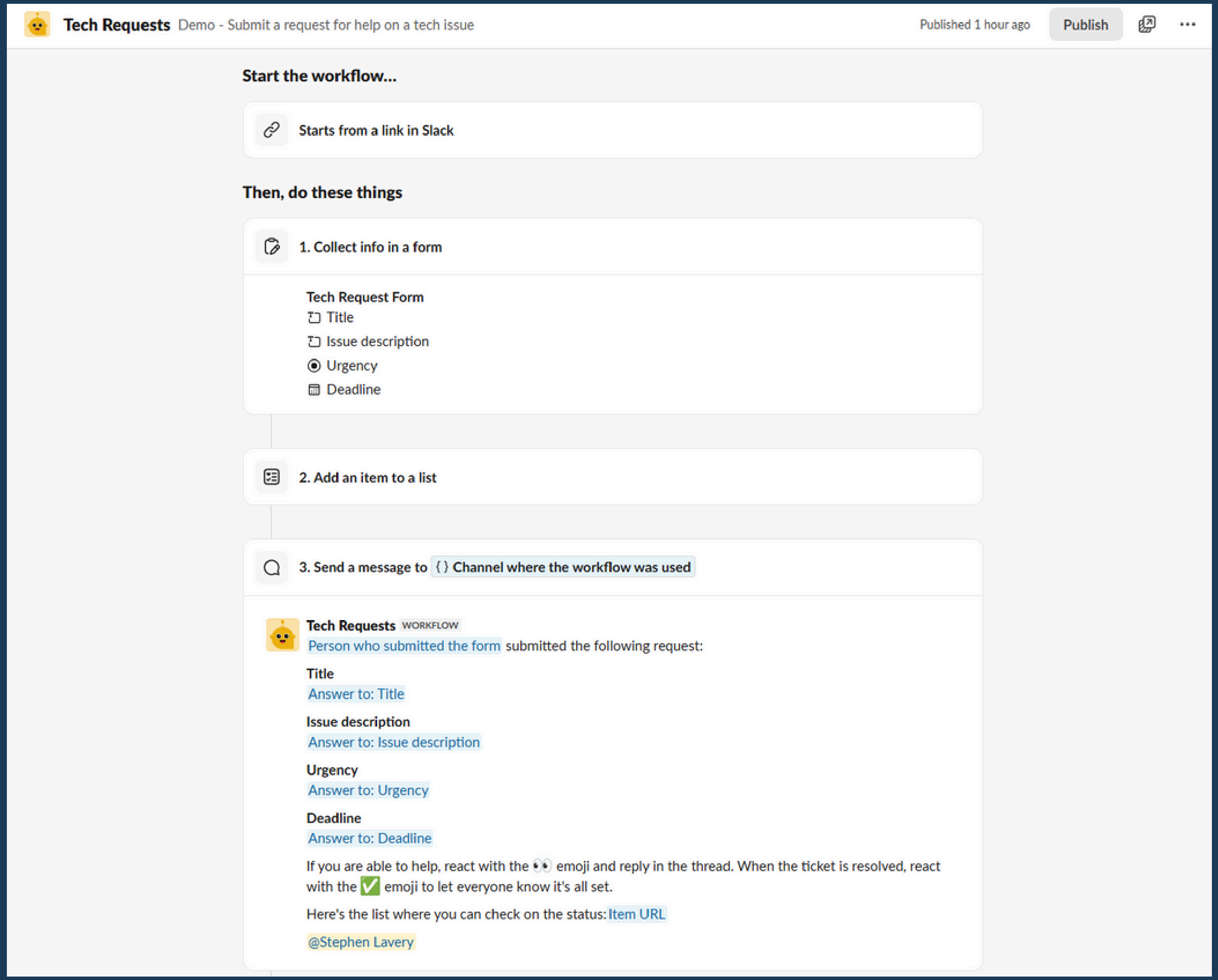
(Optional) Log to Google Sheet

Workflow adds the request to a tracking spreadsheet to track and report on later

Team reviews & responds

Anyone on the team replies in the thread

BUILD: REQUEST TICKETING SYSTEM



DESIGN: STAFF ONBOARDING TRACKER

GOAL:

Onboarding a new team member involves lots of departments, and it's easy for tasks to get missed. **Let's set up your onboarding workflow in Slack to maximize visibility and ensure everything gets done.**

TRIGGER

- Submit a form accessed via a button or a link pinned to a shared #general channel

STEPS

- Send a message to each department's #[team channel] to inform of the new team member and assign tasks to be completed
- Add tasks to a project management board with assignments and due dates

OUTCOME

- Everyone is clear on timelines and to-do's, so preparations for new team member happen
- Orientation task board automatically created for new team member
- Well-prepared and smooth onboarding process

WORKFLOW: STAFF ONBOARDING TRACKER

User clicks a button

HR team member or hiring manager clicks a button in the #team-updates channel to get started

User fills out a form

HR team member or hiring manager fills out Slack form with info about the person joining the team and their role

Message posts to each relevant team

Teams see details and tasks relevant to what they need to do to prepare for the new team member

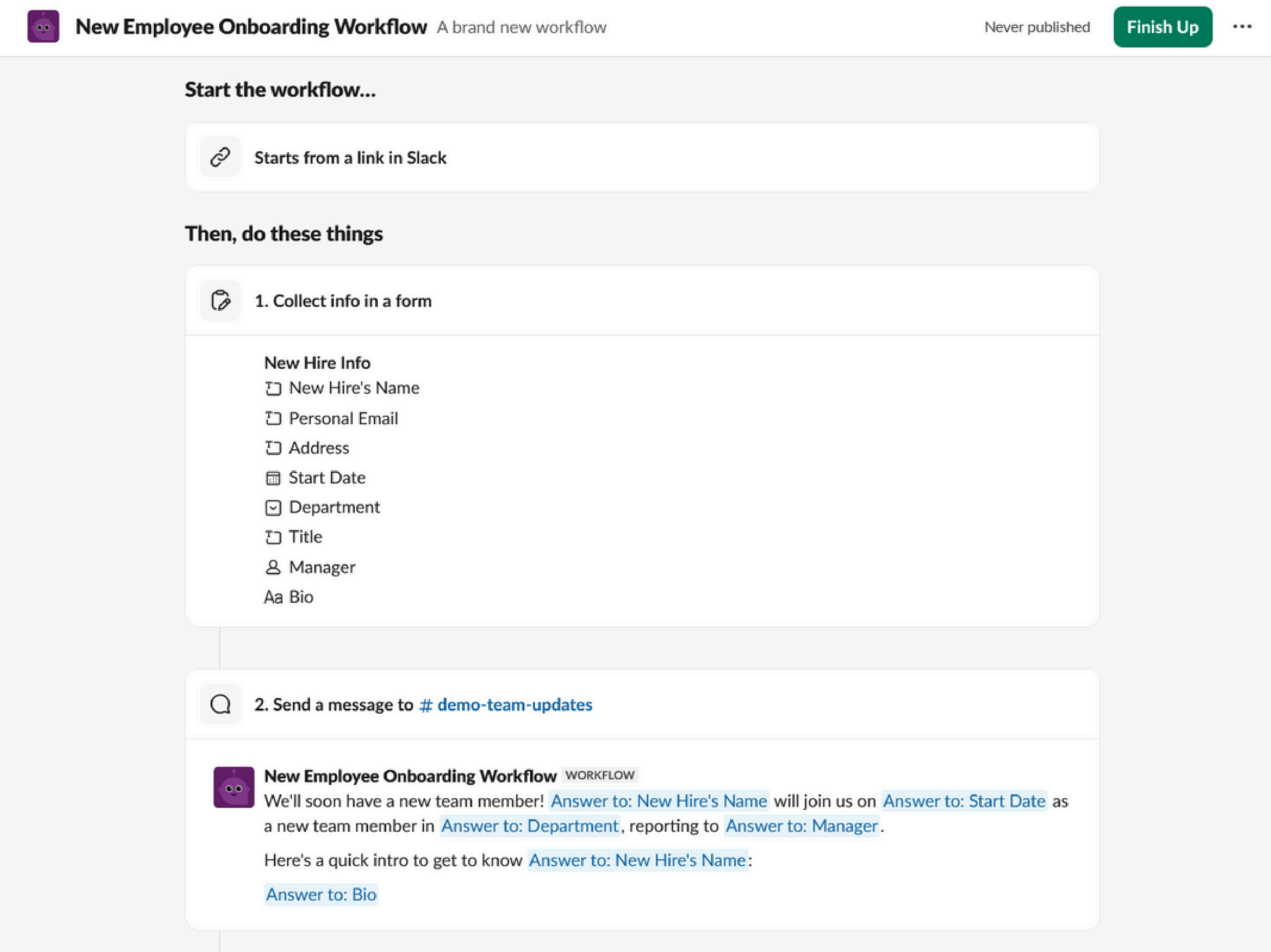
DMs post to specific individuals

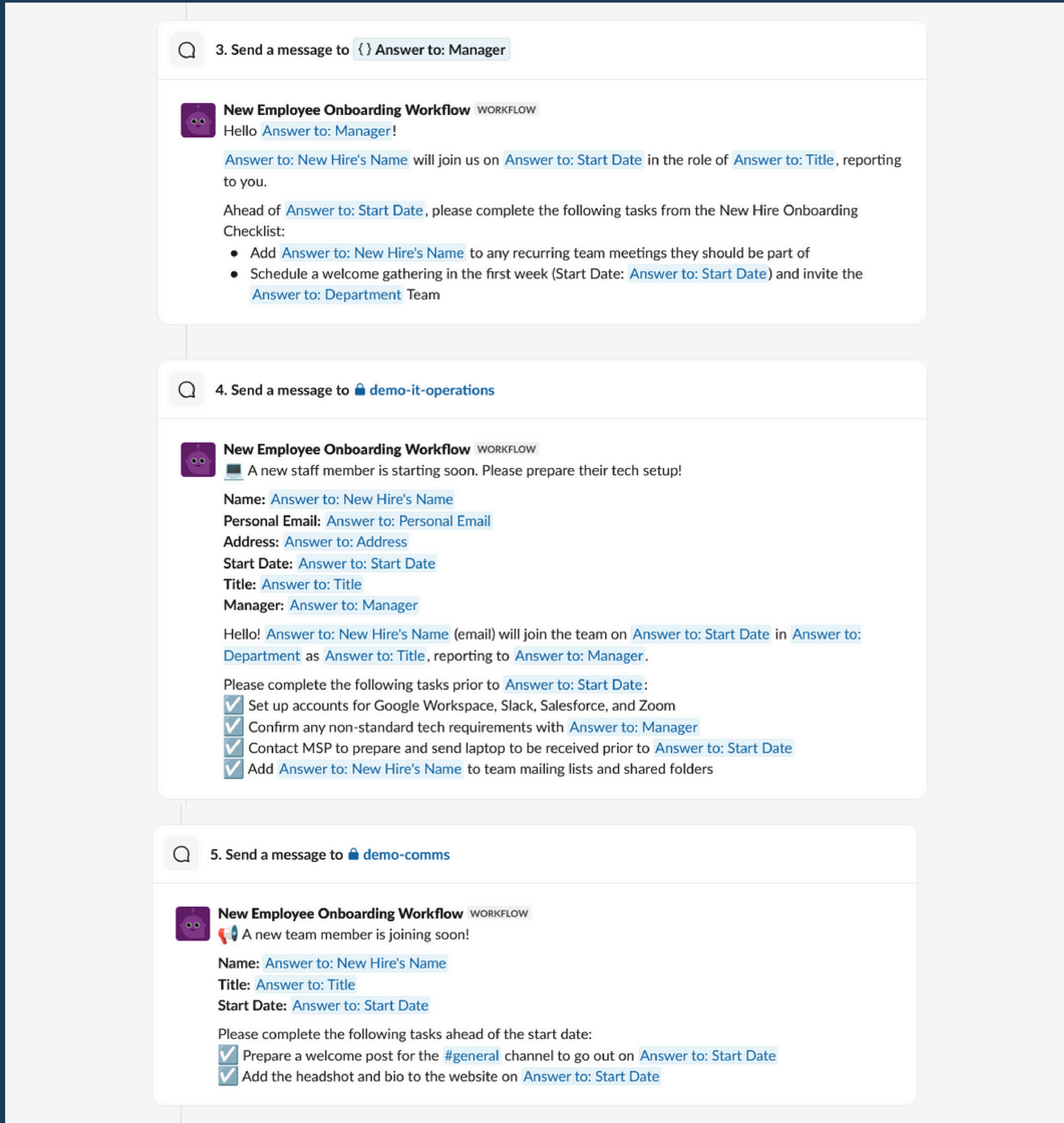
Specific individuals, such as the hiring manager, receive custom message

Team reviews & responds

All teams review the info, complete their tasks, and get ready to welcome the new team member!

BUILD: STAFF ONBOARDING TRACKER





GET IN TOUCH!

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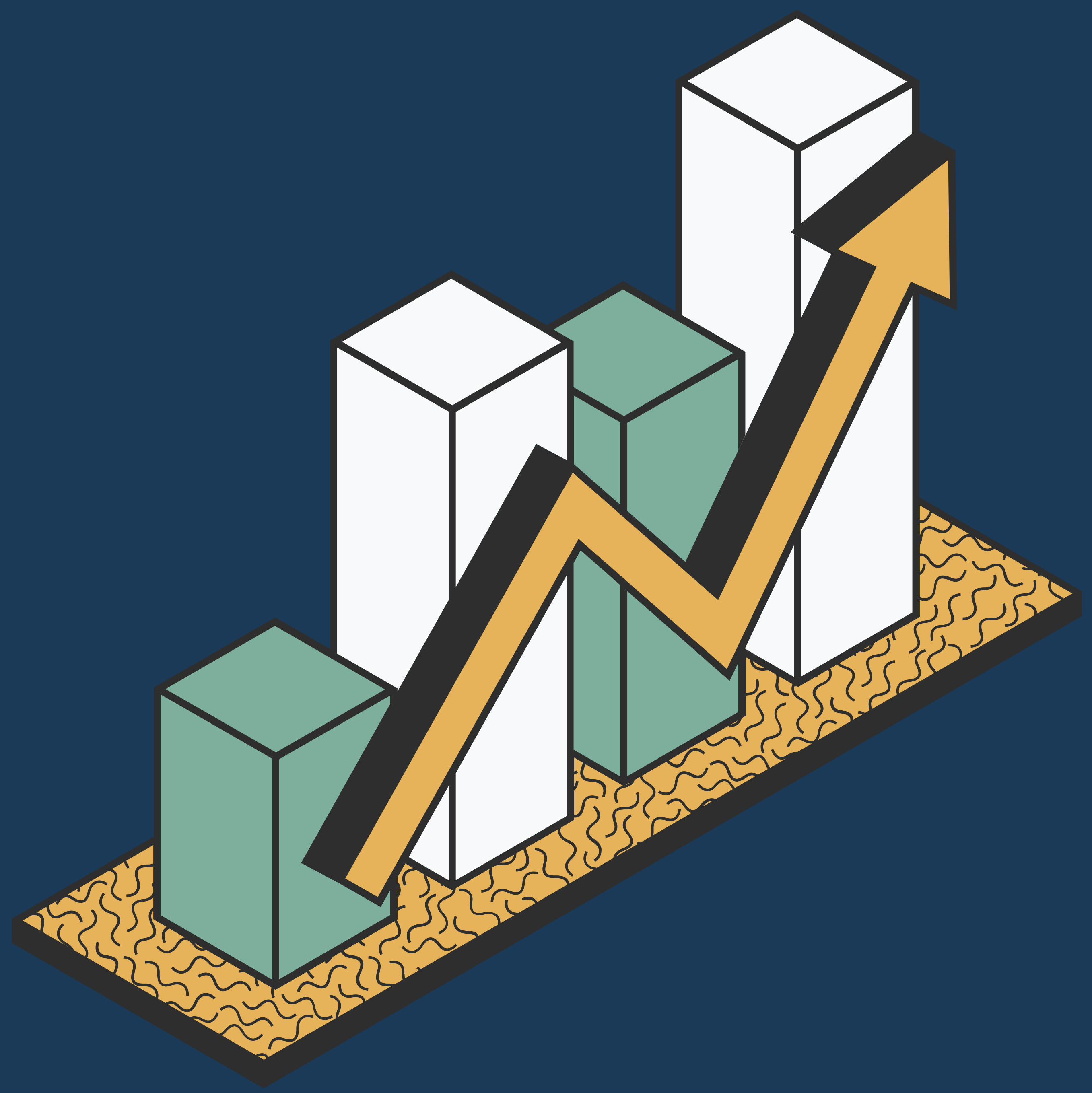
APPENDIX 1: ADDITIONAL USE CASES YOU CAN TRY



PLANNING: TEAM GRATITUDE FORM

GOAL:

Appreciation sometimes gets lost in the day-to-day. **Let's make it easy to recognize the great work your teammates are doing, make it visible, and keep track of it.**

TRIGGER

- Submit a form accessed via a button or a link pinned to a shared #general channel

STEPS

- Collect info related to the gratitude in a form (e.g., who's being recognized, by whom, for what, and impact)
- Post a message in the #general channel
- (Optional) Post gratitude in a Google Sheet for tracking, reference

OUTCOME

- Gratitude sharing becomes a regular practice in your org
- (Optional) Recognition is tracked to be referenced in performance reviews, all-staff meetings, etc.

WORKFLOW: TEAM GRATITUDE

User clicks a button

Anyone on the team clicks a button or link in the #celebrations channel to get started

User fills out a form

User fills out Slack form with info about the person being recognized and why they’re grateful

Message posts to #celebrations channel

Teams see gratitude posted in #celebrations channel

(Optional) Post gratitude to Google Sheet tracker

Details of the gratitude are added to a spreadsheet to track gratitude across the team and inform performance management

Team responds and celebrates

Everyone on the team can respond to celebrate the gratitude and share their own appreciation

PLANNING: TEAM WINS EMOJI REACTION

GOAL:

In the day-to-day, it's easy to forget to acknowledge each other's wins. Over time, a lack of recognition hurts team morale and misses opportunities to share the great work being done. **Let's make celebration and recognition effortless.**

TRIGGER

- React to any message with the :tada: emoji

STEPS

- Repost the win to #shoutouts
- Tag the person who shared it
- Add the moment to a "Team Wins" log

OUTCOME

- Foster a strong culture of appreciation
- Better morale and team cohesion
- Easy to track and report on wins at the end of the month / quarter / year

WORKFLOW: TEAM WINS EMOJI REACTION

1. **User reacts to a message with the :tada: emoji**

   Anyone on the team reacts to a Slack message highlighting a win for the team

2. **Message posts in #shoutouts channel**

   Teams see the team win message reposted in the #shoutouts channel

3. **(Optional) Post win to Google Sheet tracker**

   Details of the win are added to a spreadsheet to track wins across the team and for future reporting

4. **Team responds and celebrates**

   Everyone on the team can respond to celebrate the gratitude and share their own appreciation

PLANNING: MEETING AGENDA BUILDER

GOAL:

Teams sometimes scramble to gather agenda items before regular, recurring meetings. **Let's automate a simple collection process to build our agendas for recurring meetings.**

TRIGGER

- Scheduled workflow (every Tuesday at 10 AM)

STEPS

- Post message in #programs team channel asking team to submit agenda items
- Collect agenda items in a Slack form
- Post submitted items in a Google Sheet
- Post submitted items in #programs

OUTCOME

- More organized meetings with fuller team participation
- Fewer last-minute scrambles
- Clear visibility of priorities

WORKFLOW: MEETING AGENDA BUILDER

Every Tuesday at 9 AM

Workflow triggers on a schedule - every Tuesday at 9 AM (3 hours before weekly meeting at 12 PM)

User fills out a form

User fills out Slack form with info about their agenda items for the meeting

Message posts to team channel

Team sees agenda items in their team's Slack channel

Post agenda items to Google Sheet

Agenda items are added to a running list the meeting facilitator or project manager can then use to finalize the agenda

PM builds agenda

Project manager takes the contributed agenda items and builds a detailed agenda for the meeting

PLANNING: RESOURCE REQUEST FORM

GOAL:

Staff requests for supplies, materials, or equipment can be scattered. **Let's centralize requests for supplies and make it easy to track and manage approvals.**

TRIGGER

- Click a link or button in the #operations channel

STEPS

- Collect the request in a Slack form, including category, description of items requested, and name of approver
- Notify the #operations channel and approver of the request
- Add request to Google Sheet for tracking

OUTCOME

- Streamlined process for requesting, approving, and procuring requests for supplies
- Faster fulfillment of requests

WORKFLOW: RESOURCE REQUEST FORM

User clicks a button

Team member clicks a button in the #operations channel to get started

User fills out a form

Team member fills out Slack form with resource request details and their department's approver

Message posts to #operations and DM to approver

Operations team sees details of the request, and approver receives message asking to approve the request

Log to Google Sheet

Workflow adds the request to a tracking spreadsheet to track and report on later

Operations team fulfills request

Operations team fulfills approved requests, streamlining procurement process and ensuring team has what they need

PLANNING: BOARD UPDATE ROUNDUP

GOAL:

Executive leadership needs periodic summaries of wins and updates for their own knowledge and to keep the board informed. **Let's automate the request for and collection of these updates.**

TRIGGER

- Scheduled workflow (every month on the 1st)

STEPS

- Send DM to key staff asking for a short update
- Collect updates via a Slack form
- Post results to #leadership
- Add entries to a Google Sheet

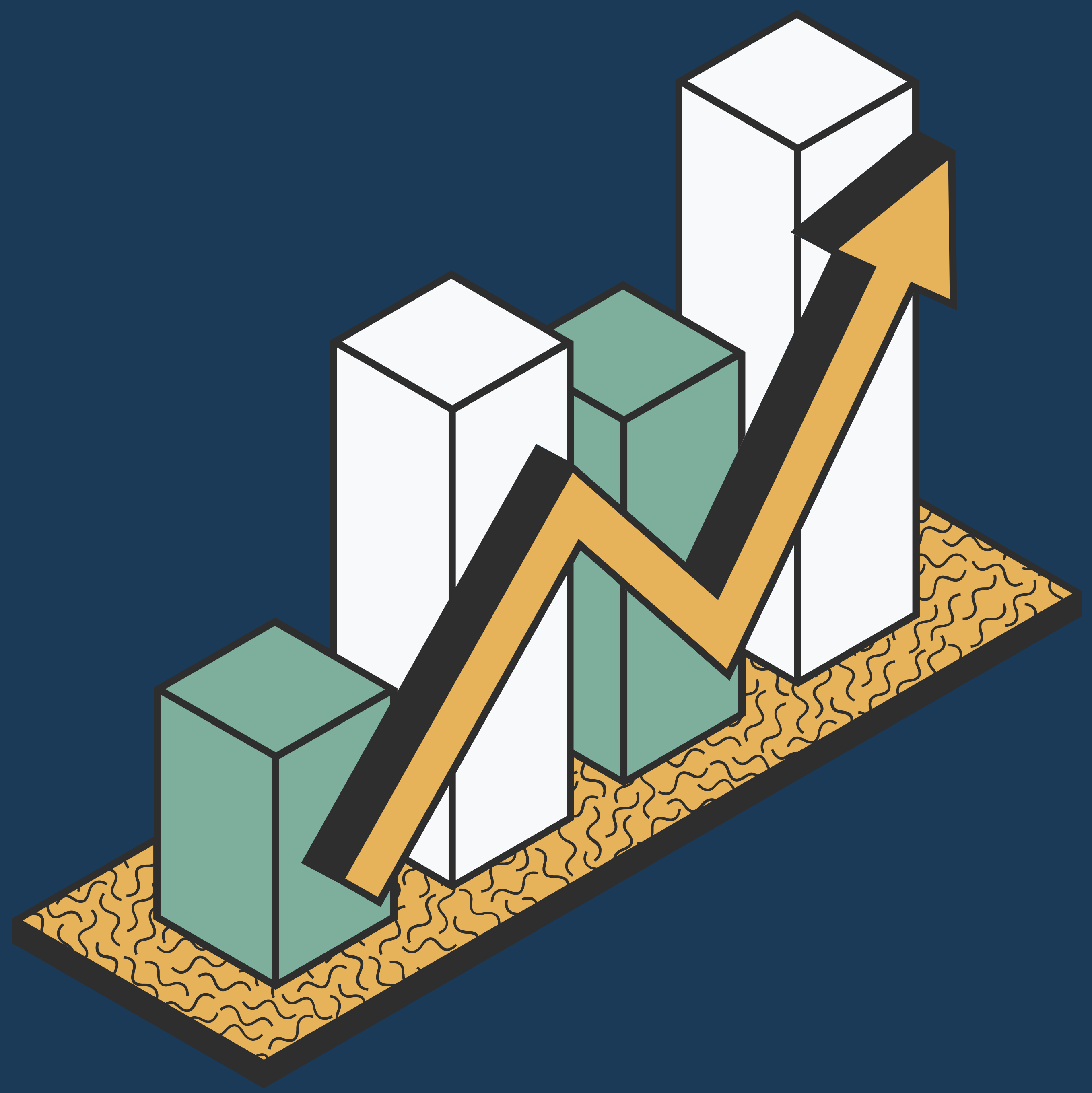
OUTCOME

- Leadership and Board has clear visibility into wins and updates
- Centralized storage of updates
- Better reporting to leadership and Board

WORKFLOW: BOARD UPDATE ROUNDUP

Every Month on the 1st	DMs sent to department leaders	User fills out a form	Updates posted to #leadership channel	Leadership presents updates
Workflow triggers on a schedule - every month on the 1st at 9 AM	Each department's leaders receive a DM with a link to submit their updates for senior leadership and the board	User fills out Slack form with their updates	Submitted updates are posted in the #leadership channel, visible to the senior leadership only	Leadership team gathers all updates and prepares report to the board, celebrates wins with team, takes follow-up action when needed

APPENDIX 2: AUTOMATION STRATEGY & GOVERNANCE



SPECTRUM OF AUTOMATION CHOICES

Simple to Complex

MANUAL PROCESSES

Track things manually

E.g., Update a Google Sheet or a record in your CRM manually

OUT-OF-THE-BOX INTEGRATIONS

Workflow functionality available in the systems you already use

E.g., Slack Workflows

INTEGRATION-AS-A-SERVICE

Low- or no-code tools designed to integrate different systems

E.g., Zapier, Workato

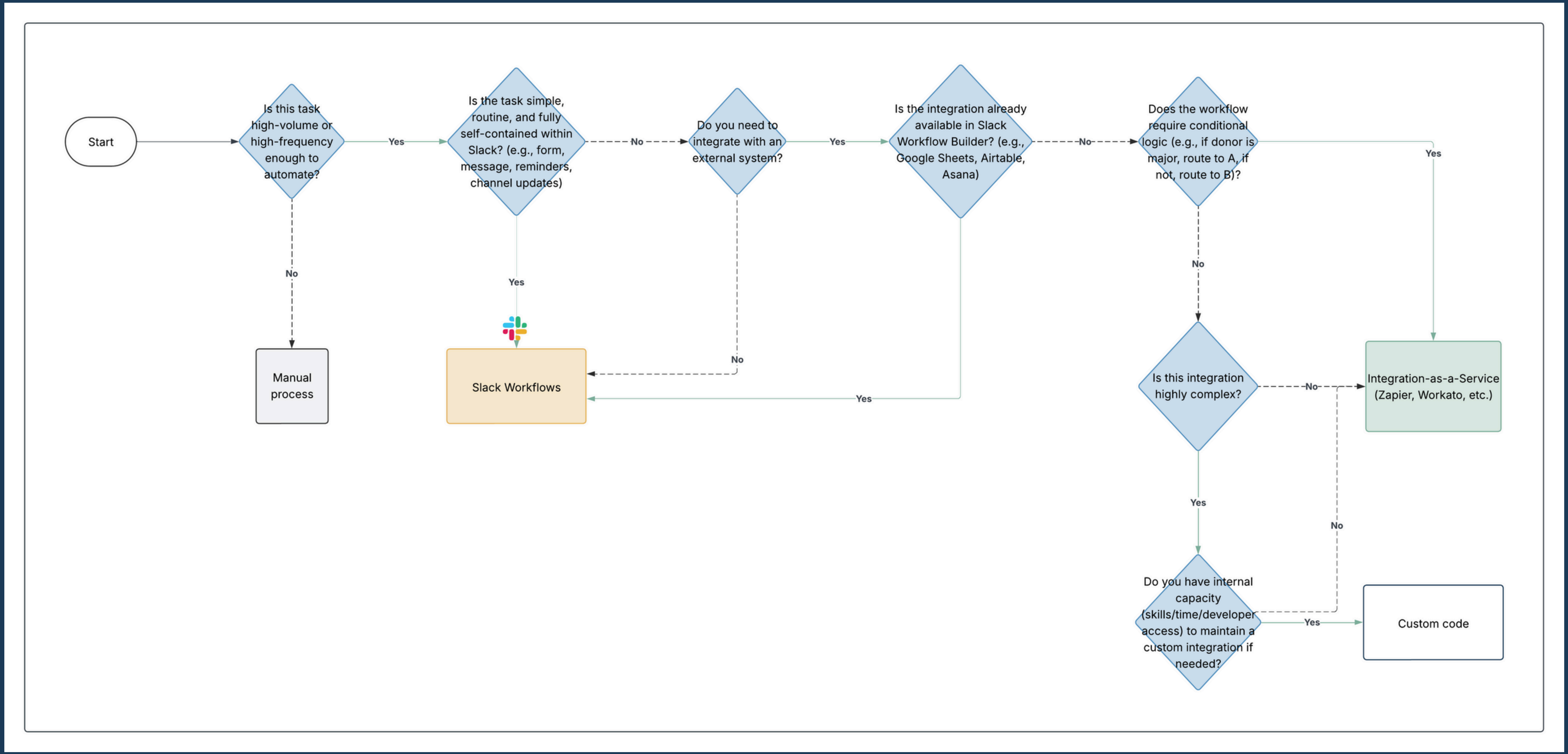
CUSTOM INTEGRATIONS

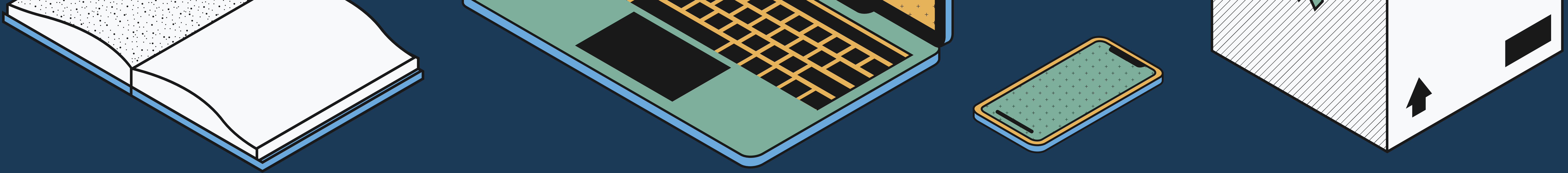
Have a developer write code to integrate different systems

E.g., Google Apps Script

AUTOMATION DECISION TREE

Use this decision tree to determine whether Slack Workflows, another automation, or a manual process is the best fit.





WHEN TO USE SLACK WORKFLOWS

- **The process happens entirely in Slack** (e.g., messages, reminders, forms, channels)
- You need a **simple, no-code automation** that **your team can maintain themselves**
- You want to **improve visibility and collaboration**
- The workflow requires **quick, lightweight actions** (e.g., collect info, post to a channel, notify a team)
- **The team already works primarily in Slack** - so the automation meets people where they already are

WHEN TO USE OTHER AUTOMATION TOOLS

- The workflow requires **integrating multiple external systems** - consider Zapier, Workato, or similiar tools
- You need **conditional logic, branching, or other complex data routing**
- **Data must be transformed, filtered, or manipulated** before being pushed somewhere
- **The automation must run even when Slack isn't involved**
- The workflow is **high-stakes** and **requires formal monitoring, versioning, or error handling**

DESIGN: TEMPLATE

GOAL:

Define the problem you want to solve, then **describe what you will do to solve it.**

TRIGGER

- What event starts the workflow? A schedule? Clicking a link? Reacting with an emoji?

STEPS

- What steps happen during the workflow?
- There may be multiple steps, such as collecting info in a form, posting messages to channels or DMs, or sending information to other systems integrated with Slack.

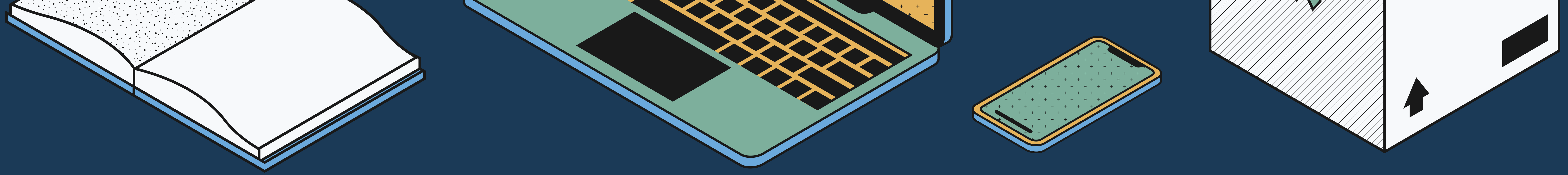
OUTCOME

- What benefits will your team realize as a result of using the Slack Workflow?

GOVERNANCE OF SLACK WORKFLOWS

Because Slack Workflows can be used effectively by anyone in your organization, there is a risk that automations might become unmanageable and disruptive. **Strong governance can help you manage this risk so your team can build useful automations while you ensure they remain reliable and sustainable.**

- **Establish Ownership** - Assign an owner for every workflow, whose job is to review and maintain the workflow over time. Create shared visibility: track workflows in a list, such as in a Google Sheet
- **Documentation Standards** - Use clear, searchable names (e.g., “IT - Tech Requests Form”). Document the purpose, trigger, and who gets notified. Use clear descriptions in Workflow Builder for future editors.
- **Manage Access & Permissions** - Decide who can create workflows in your organization. Use channel-based workflows to control who can trigger them. Limit sensitive workflows to a small group.
- **Review and Sunset Regularly** - Every quarter, take 15-30 minutes to audit your workflows. If they aren’t being used, are obsolete, or aren’t working, deactivate and archive workflows.
- **Communicate & Train** - Announce new workflows to your team when they’re launched. Provide instructions and demos in multiple modalities so your team knows how to use them. Include a reference guide for common workflows.



START FROM A TEMPLATE

- Faster way to get started - no need to reinvent the wheel!
- Cover common scenarios, including requests, reminders, and check-ins
- Great place to start if you're new to Slack Workflows!

START FROM SCRATCH

- More control and ability to customize to meet your needs
- Great for unique scenarios that templates don't cover
- Ideal if you have a well-defined process in your org that you want to bring into Slack