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Slack Integration User Guide

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Slack Integration Overview

Slack Integration with Betterworks

The Betterworks Slack integration, also known as Betterworks Slackbot, offers a seamless solution for employees using Betterworks who wish to enhance their collaboration and goal management within the Slack workspace.

If you're a Betterworks user aiming to stay informed about your goals, achievements, and recognitions without navigating away from your Slack environment, this integration is ideal.

With real-time notifications and the ability to take immediate actions directly from Slack, the Betterworks Slack integration streamlines communication. And it ensures that employees can effortlessly stay on top of their performance objectives while remaining within their preferred collaboration platform.

Key Features:

→ **Weekly digest** receive goal status notifications every Monday to boost progress

→ **Manage goals** through Slack to simplify your workflow and stay up to date on initiatives

→ **Give and receive recognition** publicly via Slack to promote collaboration and appreciation culture.

→ **Request feedback** for actionable insights and fresh perspectives to inspire self-growth.

→ **Give meaningful feedback** anytime or during scheduled cycles to reinforce positive behaviors and help colleagues develop new capacities.

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Manage Goals. Take Action & Save Time.

Use the Betterworks Slack integration to execute goals and enhance collaboration all in the flow of work.

Get Started →

Slack Integration Notifications

Enabling Slack Notifications

By default, all of your notifications will be enabled after the Betterworks Slackbot is installed by your organization's administrator.

However, you can manage your personal notifications in your My Settings panel.

To access, in the upper right corner: Click on your name
→ My Settings
→Notifications
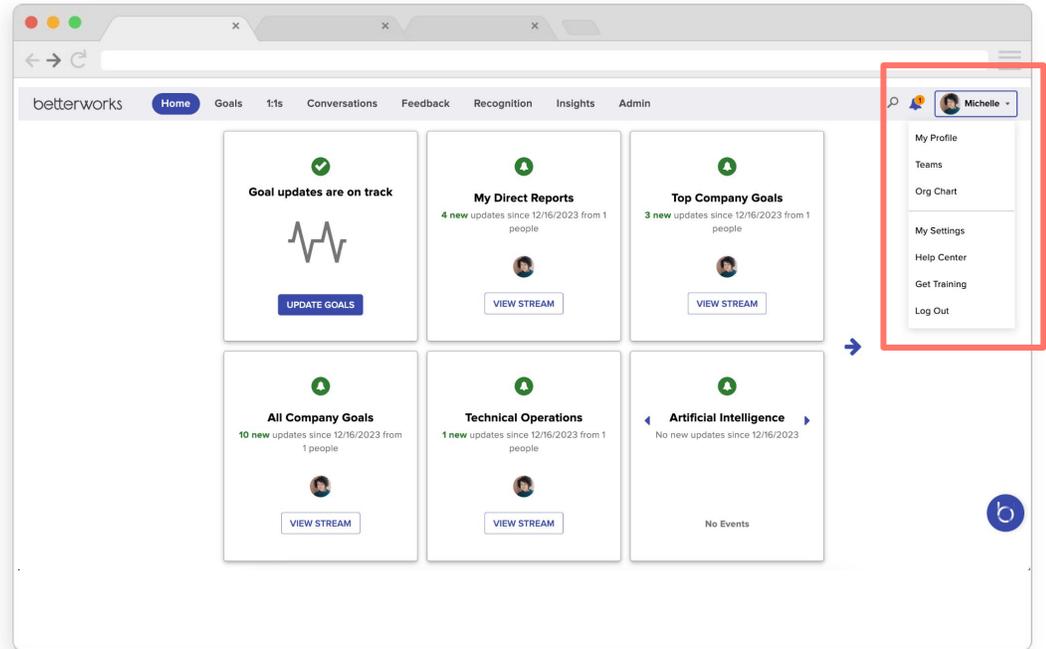
Managing Slack Notifications

You can turn on/off each notification type to manage the updates you'll receive about Betterworks via your Slack to match your preferences.

NOTE: This tab only updates preferences for your instance and does not impact other users.
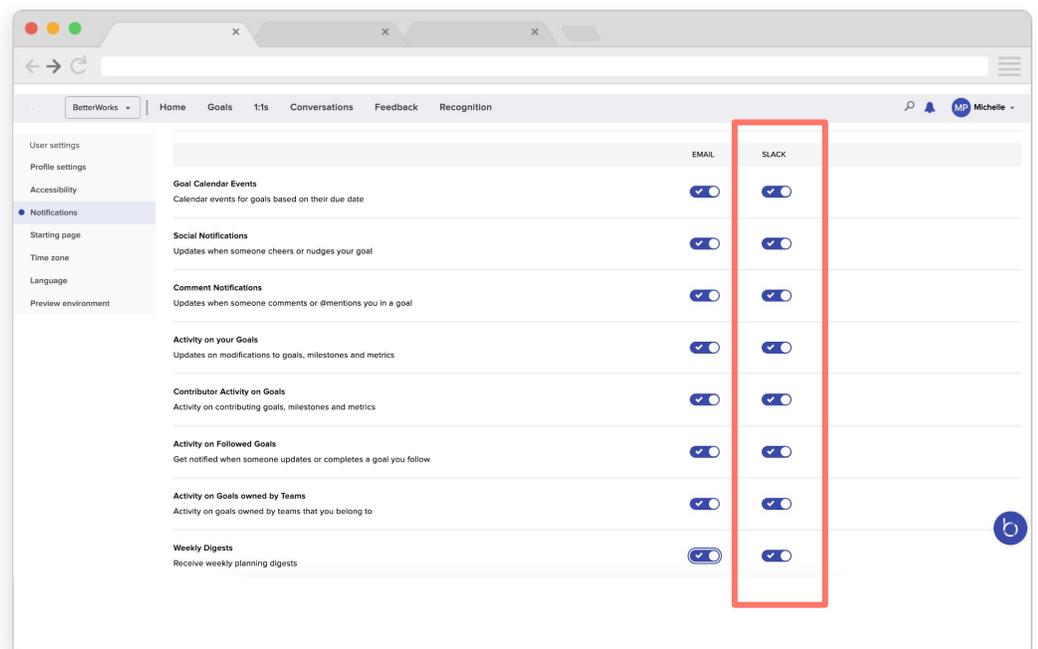
Types of Slack Notifications

Betterworks Slack notifications keep users informed about their progress and provide guidance on necessary actions to stay aligned with the organization's Betterworks program seamlessly within the Slack interface.

There are a few different types of notifications users can receive:

- Weekly Digest
- Request Scheduled Feedback
- Give Scheduled Feedback
- Receive Recognition
- Conversation Cycle Starting

Weekly Digest

What it is: On Mondays at 8 AM (your organization's timezone), you will receive a summary of your goal statuses, pending feedback requests, pending conversations, and a friendly nudge to recognize someone from your organization.

How to use it: Use this update as an opportunity to access your goals for your upcoming week and prioritize your time to align with your goals.

➔ *Everything on track?* Great! Who could you recognize from your organization who helped support your success last week?

➔ *Is a goal off track?* What actions can you take or who can you tap to collaborate with to drive progress during this week?

➔ *Conversations to complete?* Use this prompt to create a habit of blocking off time on your weekly schedule to complete each outstanding conversation or feedback request.
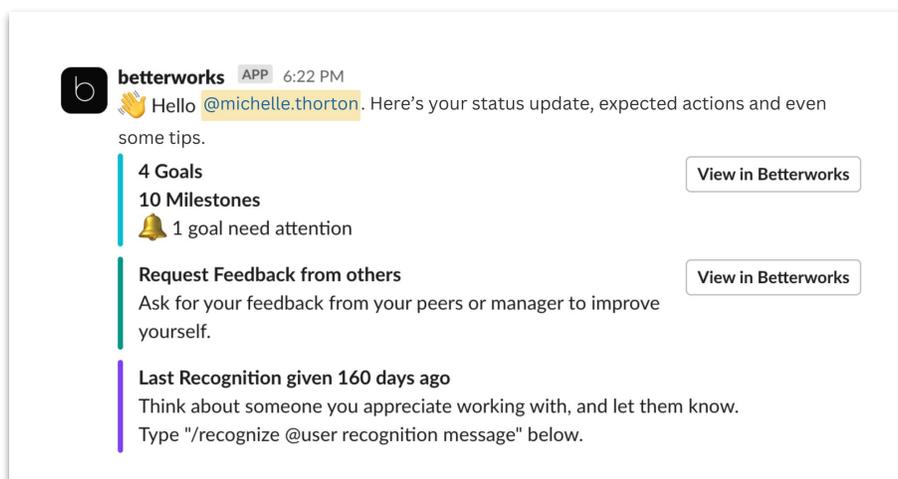
Types of Slack Notifications

Request Scheduled Feedback

What it is: If your organization is running a scheduled feedback cycle and you've been given the necessary permissions to select feedback providers, you'll receive a notification. You can make your selections directly from Slack.

How to use it: Click on the Select Providers button in your Slack notification to complete this request and cross this task off your to-do list.

➔ *Quick Completion* This feature makes it easy to quickly complete this request on the spot, in the flow of your work, and keep your day moving along. Instantly cross tasks off your to-do list while actively working in slack.

Give Scheduled Feedback

What it is: If your organization is running a scheduled feedback cycle and you've been nominated to provide feedback, you'll receive a notification. You can decline or give feedback directly from Slack.

How to use it: Click on the green Give button in your Slack notification to complete this request.

➔ *Complete Now* This feature makes it easy to quickly complete this request in the midst of your work, allowing you to seamlessly progress through your day.

➔ *Manage Time for Later* Use this notification as a prompt to build a habit of scheduling your time. Take a look at your calendar and block off time to complete the feedback request by the deadline in the notification.

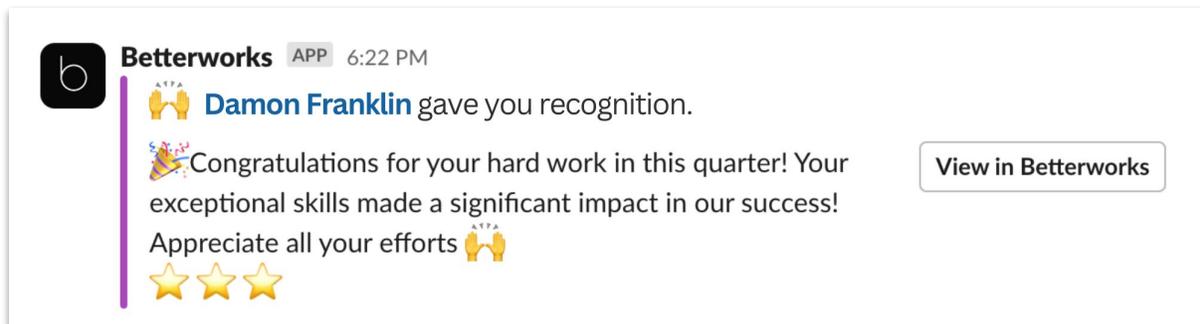# Types of Slack Notifications

Receiving Recognition

What it is: If you are given recognition, you'll receive a notification that includes the recognition text.

How to use it: If you have a Betterworks Slack channel, head to your recognition wall where you can add a little reply comment or leave a gratitude emoji for your hype person.
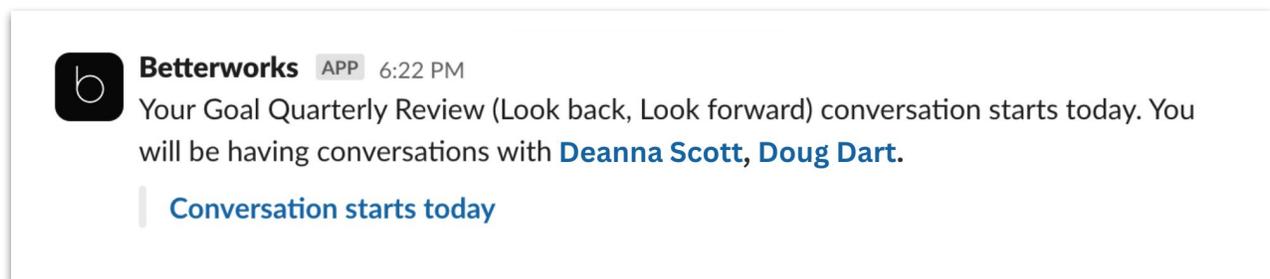
➔ **Reply back:** Add words of acknowledgment, share the recognition with any collaborators, and add more context to the praise.

➔ **Drop some Emoji love:** Whether its a 👋 🎉 or one of your organization's custom emoji favorites, drop some emojis to amp up the excitement and celebrate.

Betterworks APP 6:22 PM
🙌 **Damon Franklin** gave you recognition.

🎉 Congratulations for your hard work in this quarter! Your exceptional skills made a significant impact in our success! Appreciate all your efforts 🙌
⭐ ⭐ ⭐

View in Betterworks

Conversation Cycle Starting

What it is: If your organization is running a scheduled conversation cycle and you've been included, you'll receive a notification.

How to use it: As a prompt to view the conversation questions and block time on your calendar to complete the conversation within the due date range.

Betterworks APP 6:22 PM
Your Goal Quarterly Review (Look back, Look forward) conversation starts today. You will be having conversations with **Deanna Scott, Doug Dart.**

Conversation starts today

Slack Integration Commands

How Slack Commands Work

Slack commands serve as convenient shortcuts within the Slack platform, allowing users to quickly take action or access information without navigating through multiple menus.

Commands have the same format starting with a forward slash, making them easily recognizable and accessible.

Betterworks Slack Commands

/goals Use this command to quickly view or update your goals on Betterworks directly from Slack. It provides a seamless way to stay connected with your objectives without leaving the conversation.

/recognize This command enables users to express appreciation and acknowledge the achievements of their peers. This feature fosters a positive and collaborative work environment, allowing recognition to be shared effortlessly within the Slack platform.

/givefeedback When constructive feedback is essential, the /givefeedback command comes into play. Use this command to provide feedback on specific tasks, projects, or team members, streamlining the feedback process and promoting open communication.

/requestfeedback Prompt meaningful feedback to develop new capacities and promote collaboration. This command allows individuals and managers to encourage a culture of continuous feedback.

To use these commands:

➜ Type the desired command in the Slack message input field.
   i.e. to access your goals, type "/goals" and press enter

NOTE: The following pages will show you what it looks like to use each of the Slack commands so you are ready to introduce Betterworks into your flow of work.

Slack Integration Commands

/Goals Command

How to use it: Use "/goals" to view, update progress, and comment on goals.

➔   This command makes it easy to manage your goals right in your flow of work, without having to leave Slack.

What to expect when using the /goals command: The below workflow shows you what it is like to use this prompt to update your goals in three easy steps.

Step 1: Use the /goals Slack command

➔   **Go to your Betterworks Slack app** inside of Slack located on your left menu
➔   **Type the command** /goals in the message field
➔   **Click** on the /goals command bar that appears in the pop-up drop down menu
➔   **Press** the green send button
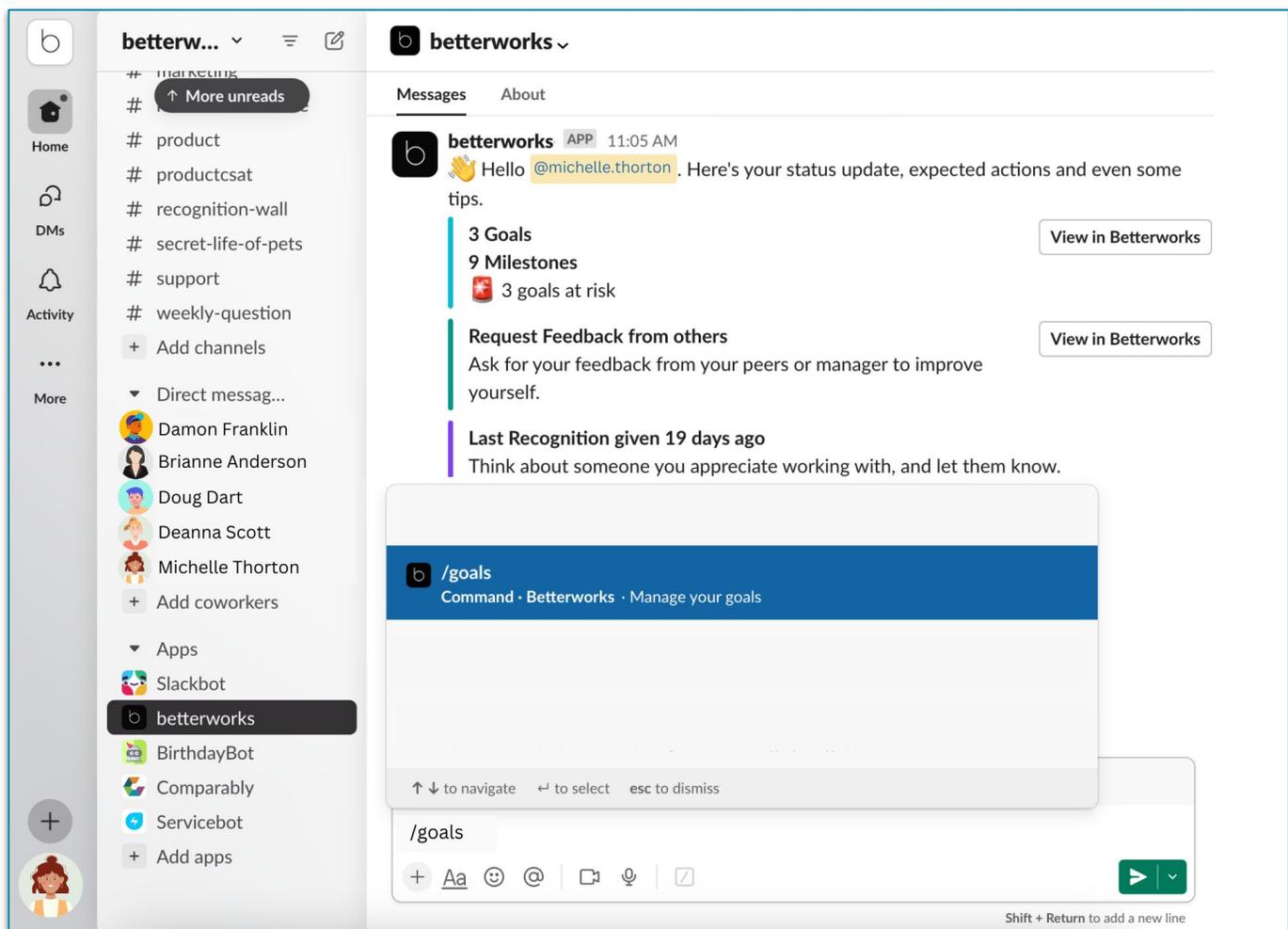
Slack Integration Commands

/Goals Command

Step 2: Review your goals in the Betterworks app slack feed

➔ **Review your goals** and current progress in your Slack feed
➔ **Click View details button** next to each goal for more detailed information

Step 3: Update progress and/or add comments to your goals

➔ **Click** the Update Progress button for the goal/milestone you want to update
➔ **Enter your progress** and a comment for the milestone in the pop up box and click submit
➔ **Your new updates will appear** in your Betterworks app feed

Slack Integration Commands

/Recognize Command

How to use it: Use "/recognize" to give public recognition to other users in your organization.

➔ **You can post in any channel** (public or private) and the recognition will automatically be added to the Recognition Wall in Betterworks.

What to expect when using the /goals command: The below workflow shows you what it is like to use this prompt to give recognition in three easy steps.

Step 1: Use the /recognize Slack command

➔ **Go any Slack channel** in your Slack instance
➔ **Type the command** /recognize in the message field
➔ **@mention** the person(s) you would like to give recognition after the command
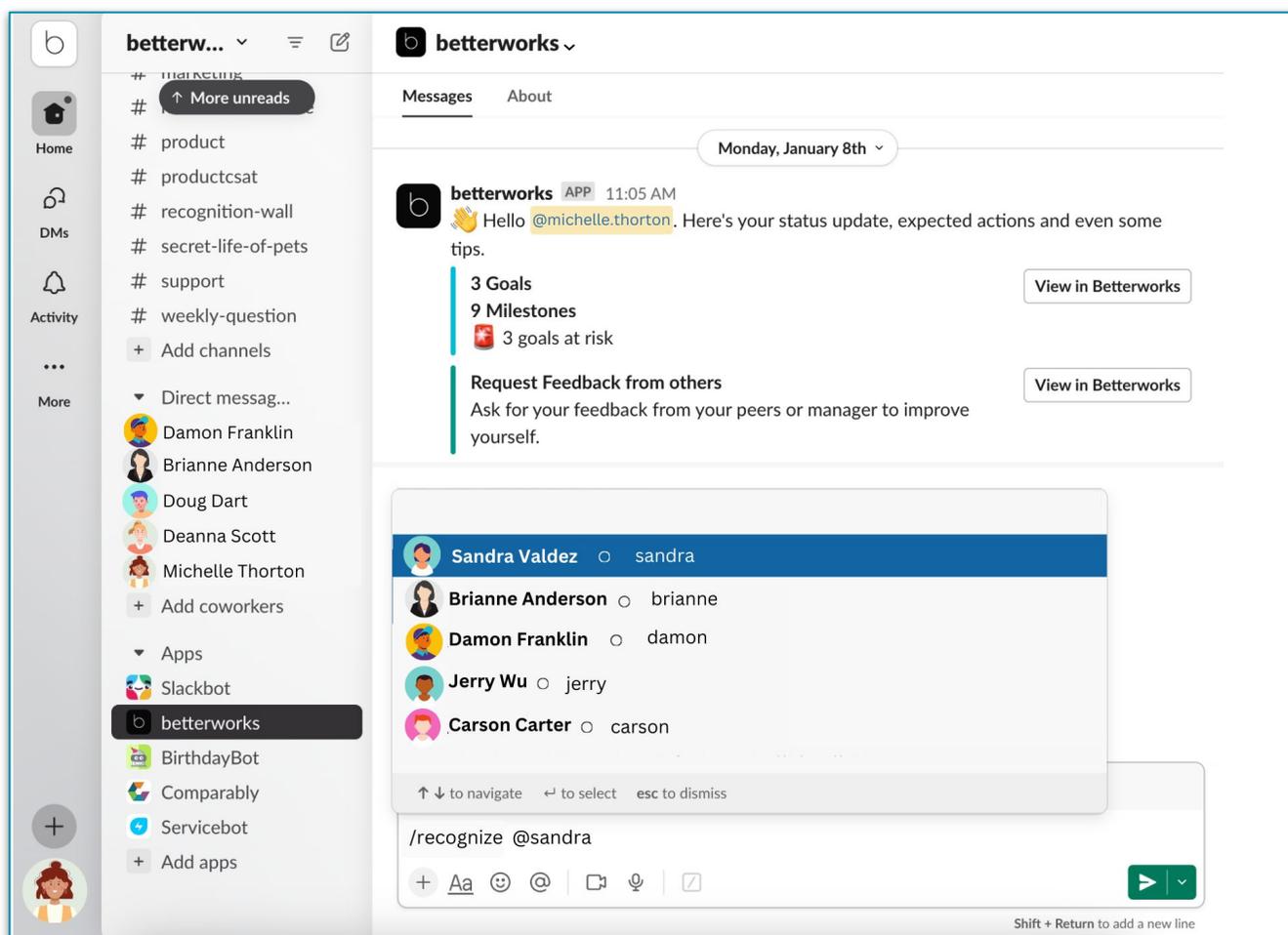
NOTE: To enable a slack #recognition-wall channel for your organization, please see our support article: Configuring Recognition.

Slack Integration Commands

/Recognize Command

Step 2: Give recognition

Type your words of recognition in the message field after **/recognize @mention**

Add a company #hashtag to tie the recognition into your company values.

Hit the green Send Button to submit.

NOTE: You will be asked to confirm your submission or get a chance to cancel in the next step.
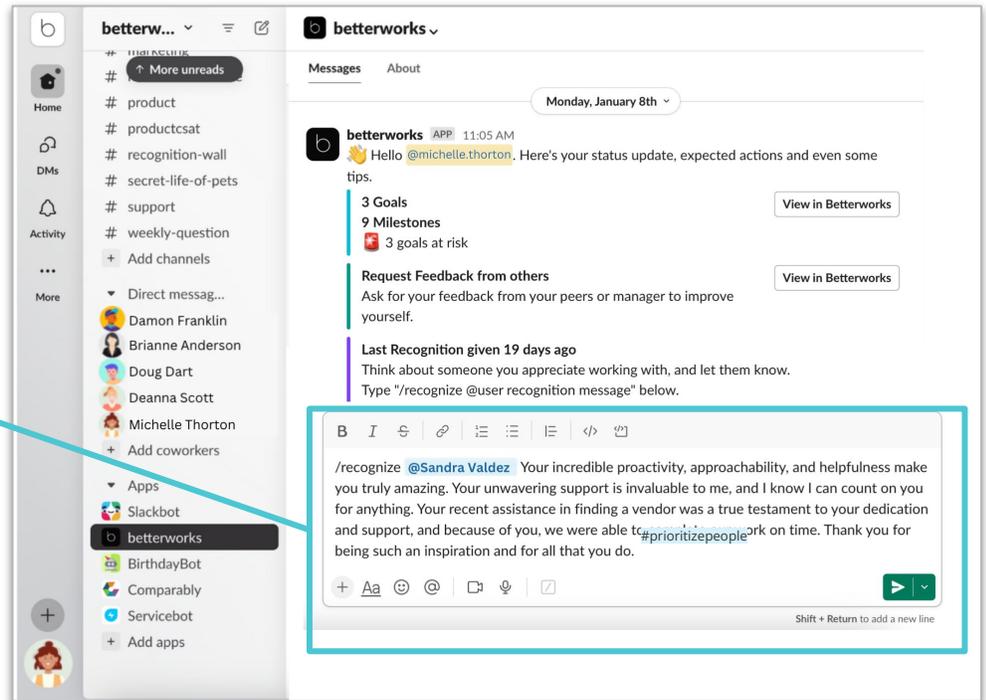
Step 3: Confirm submit

This final review step gives you a chance to double check your submission prior to posting.

Hit Submit to confirm your submission

Hit Cancel if you would like to make any corrections or cancel completely.

NOTE: If you choose to cancel to make an edit, copy all of your text first and paste it into the message bar. *Once you cancel, your submission will disappear from the draft post.*
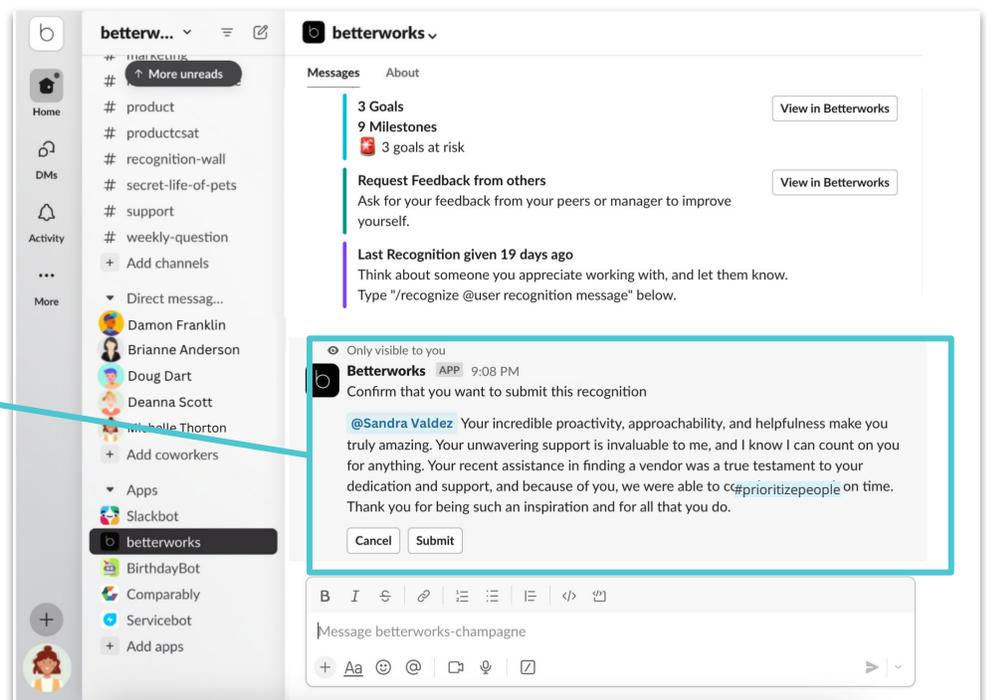
Slack Integration Commands

/GiveFeedback Command

How to use it: Use "/givefeedback" to give anytime feedback using one of your organization's anytime feedback templates.

➔ **NOTE:** To use this command, your Admin Team must have an Anytime Feedback template activated for your organization

What to expect when using the /givefeedback command: The below workflow shows you what it is like to use this prompt to give recognition in three easy steps.

Step 1: Use the /givefeedback Slack command

➔ **Go to your Betterworks Slack app** inside of Slack located on your left menu
➔ **Type the command** */givefeedback* in the message field
➔ **Click** on the */givefeedback* command bar that appears in the pop-up drop down menu
➔ **Press** the green send button

Slack Integration Commands

/GiveFeedback Command

Step 2: Select your feedback recipient and template

➔ **Select user** choose the individual in your org you would like to give feedback
➔ **Select a template** choose the feedback template you would like to use
➔ **Press submit** to make your selection

NOTE: Don't see this command in your instance? Let your Admin Team know you would like to incorporate Feedback into your available tools.

Step 3: Give feedback

➔ **Fill out the Feedback Template** fields in the pop up form box.
➔ **Hit the Submit button** to complete your feedback
➔ **Recipient will be notified** they have received feedback

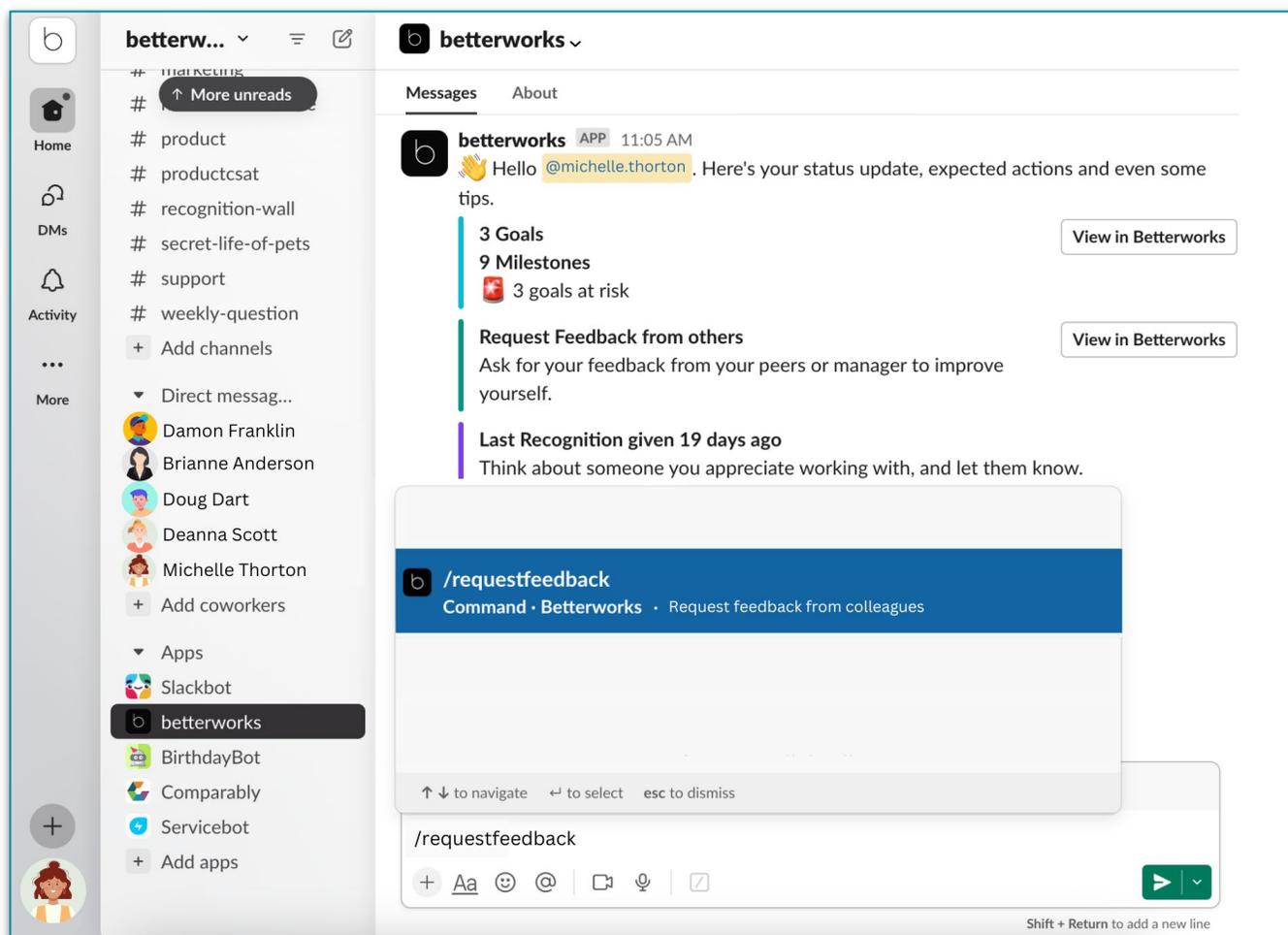# Slack Integration Commands

/RequestFeedback Command

How to use it: Use "/requestfeedback" to request meaningful feedback from your colleagues using one of your organization's anytime feedback templates.
- ➜ **Managers** can request feedback for themselves and also their direct reports.
- ➜ **Individual contributors** can request feedback about themselves.

- ➜ **NOTE:** To use this command, your Admin Team must have an Anytime Feedback template activated for your organization

What to expect when using the /requestfeedback command: The below workflow shows you what it is like to use this prompt to give recognition in three easy steps.

Step 1: Use the /requestfeedback Slack command

- ➜ **Go to your Betterworks Slack app** inside of Slack located on your left menu
- ➜ **Type the command** */requestfeedback* in the message field
- ➜ **Click** the */requestfeedback* command bar that appears in the pop-up drop down menu
- ➜ **Press** the green send button

Slack Integration Commands

/RequestFeedback Command

Step 2: Select your feedback recipient and template

➔ **Select your name** or managers can select a direct report
➔ **Select a template** choose the feedback template you would like to use
➔ **Press submit** to make your selection

NOTE: Don't see this command in your instance? Let your Admin Team know you would like to incorporate Feedback into your available tools.

Step 3: Select your feedback provider

➔ **Select your feedback provider(s)** in the pop up form box
➔ **Add an optional note** to help your provider(s) give the type of feedback you're seeking
➔ **Hit the Request button** to submit your request
➔ **Selected providers will be notified** you are requesting feedback from them

Slack Integration FAQs

FAQs

Can the Slack integration be limited to a select group of users?
Not at this time. Once the Betterworks Slackbot is enabled, it's enabled for everyone entire organization as long as users have a Slack account.

Does the Slack integration work with multiple teams?
Not at this time. The Betterworks Slackbot only works with one Slack team per organization. If your organization uses multiple teams in Slack, you may consider consolidating them into one team and start using channels to separate your conversations.

Is there a character limit when entering recognition?
Yes. 1,900 characters.

Is there a character limit when entering feedback?
Yes. 3,000 characters.

Is there a draft feature for the modules in SlackBot?
Not at this time. When using the Betterworks SlackBot, be prepared to complete your submission during your slack command session.

For recognition and feedback, if you plan to work on your submission over a period of time, we recommend using the Betterworks web application where you are able to save your drafts before your final submission.

Can my organization disable or customize Slack commands?
Not at this time. The commands are the same for all organizations and all users.

What would happen if I use a command for a module that my organization hasn't enabled (i.e. if use the "/givefeedback" when my organization does not have the Feedback module enabled in Betterworks)?
You will receive an error message.

In the event that a module is not enabled, please contact your Admin Team and let them know you are interested in that feature. Our Betterworks customer team can help your organization roll out new features upon request.