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Truly Professional Instant Messaging

Or, how your team can not just communicate better, but operate your entire company more smoothly and holistically, as seen through the lens of Slack.

Slack.

It's not the only business messaging app out there, but it is one of the most popular and accessible. And after using it for as long as it has been around, I have some thoughts on it and the culture of business instant messaging.

Though there are other solutions for business instant messaging out there, Slack is the one I'm most familiar with. This paper will talk about instant messaging in general, but Slack is where it's at as far as the specifics go.

This paper is more than just being the boring, mundane, topic of "how to use Slack better," though. It's about how to run a professional organization. Emphasis on *professional*, by which I mean:

> **pro·fes·sion·al**
> *adjective*
> Behavior that exhibits the qualities of being trained or technically skilled; having the characteristic of **being aware** of the contextual backdrop as well as immediate and future needs of people, places, and systems **and exhibiting courteousness, conscientiousness, and consistency** in serving those needs.

I emphasize the word with a definition because of the history and nature of messaging. Messaging is a very new phenomenon to the human experience and one that lends itself to a more casual approach to communication, something that spills over into our work space, sometimes for the better, but on occasion, not.

Nowadays, it's far more common for me to hear someone say "text me" rather than "call me," or "don't leave a message, shoot me a text if I don't answer." Texting is more flexible compared to talking in much of our modern circumstances.

It's easier to skim text than to have to listen to a voicemail. Texting is first and foremost asynchronous in nature, so a response can wait, whereas a phone call (and presumably the left voicemail) implies a sense of immediacy. Texting fits better into the wake of our busy lives than phone calls do. More so even than meetings.

Texting is also distancing in nature. A screen, a keyboard, the written (often transliterated) word, and a billion electrons separate you and your conversation partner. For many people, this is a blessing. For some, a curse. It all depends on your personality and who you're talking to.

But this isn't a treatise on the history and psychology of instant messaging. This is about how you are probably using Slack now and how you can use it to better improve your business communications. The historical context is here to help you understand that the source of some of your communication problems — and as we'll explore, also your operational problems — has deep cultural roots.

The Essentials

Let's start this with the essentials of how to use Slack (or any other instant messaging app) for the professional business environment. There are three sections, the short cheat sheet, making the distinction between channel types, and a brief on how to organize Slack and the use of integrations.

The cheat sheet will get you started. If it's the only thing you read and adopted for your business of instant messaging practices, you'll make make significant strides[1] forward with your team's communication skills. The *Managing Threads* section from the latter half of the paper elaborates on some details from the cheat sheet to help you make best use of the concepts.

🎗️ The Cheat Sheet

If you don't read on any further, this should be sufficient to help get you started on improving your team's business messaging skills. This assumes you know something about Slack already. This should highlight some best practices I've employed through years of experience, but as with all practices, feel free to adapt to your own business needs.

1. **Be courteous**. When in doubt, default to politeness. ***Corollary***: You should never be in doubt about being courteous and polite.
2. **Business first**. We're here to get a job done. It's okay to be straightforward and direct in your communications.
3. **Start**, *but do not continue*, conversations in the main channel. If you feel the need to reply, respond in a thread, not in the main channel.
4. **Continue** conversations in one or more threads — This is where a specific topic should be discussed.
5. **Mention** people who:
    a. Might have useful insight into the conversation thread.

[1] Stride was the name of a competitor to Slack by Atlassian, the makers of Jira and Confluence, who ironically ended up selling the Stride intellectual property and user base to… Slack.

   b. Need to be informed by virtue of their position or knowledge. Use "Cc:" to indicate this, but don't expect a reply.
6. **A change** of topic is a change of thread. If someone breaks off from the initial thread topic, then branch by using the "Forward Message" option to create a new topic of conversation off the main channel, then reply in the new thread.
7. **Highlight** or remind people in the main channel of an important note by using the "Also send as a direct message" checkbox. This will keep the topic in thread still, but show up in the main channel. Don't start a new thread on the same topic, however.
8. **Inform** people that a thread should be used by one of the following:
   a. Suggest that the topic is moved to a thread, and start the thread from that very suggestion.
   b. Pick a previous pseudo-thread and reply to it while checking on "Also send as a direct message" in order to inform people in the main channel.
   c. Use the 🧵 emoji, either by itself or with text, to emphasize the move to a thread.
9. ⛔ **Hijacking** is ***VERBOTEN***! There are two types of hijacking ("thread-jacking") to be aware of:
   a. Don't hijack a main channel by replying in the main channel itself. Reply inside the thread.
   b. Don't hijack a thread by changing topics. Keep on the topic at hand, or spin off into a new thread.
10. ⛔ **Pinging** is also ***VERBOTEN***! Pinging is the act of continually @mentioning someone who hasn't replied recently. Give them time to reply on their own terms. Instant messaging does not mean instant response. Slack will alert any and all folks previously @mentioned in a thread.

⛲ Public or Private?

Slack offers three channel perspectives: Public, private, and direct messages. These are relatively self-evident as far as functionally is concerned, but there are some nuances to consider.

Despite the word private implying being limited to only a few people, which is true, both private and public channels are still "open" to a wider audience. Private channels are named and for the people originally added to the channel, the content and context is freely available and can be shared by new people added. Private can be converted to public and vice versa.

This is not the same for direct messaging, which is a "closed" form of communication. DMs are, by design, unnamed and restricted to the people who were originally added. The content and context can not easily be made available to a wider audience. In Slack, only up to nine people can be in a DM, further restricting its utility.

> *Always favor public channels above all else. Understand the exceptions before choosing to go private.*

Mini-Cheat Sheet for Channels

1) Public: This should be your default mode of thinking. Transparency and inclusivity come first.
2) Private: For pre-planning (and eventually to be made public) and for purposely restricted or business sensitive topics.
3) Direct Messages: One-off and micro-conversations. With exceptions (see below in *Regarding Direct Messages*), the default should be to avoid DMs.

👥 Organizing Slack

When it comes to organizing Slack, I think the folks at Slack actually do an awesome job at making recommendations, so I'll leave the bulk of describing that to them: https://slack.com/resources/using-slack/how-to-organize-your-slack-channels.

There are two things I'd like to elaborate on:

Projects over Teams

Many companies are inclined to think in terms of teams: Software, sales, business development, account management, finance and so on. This is a fine way to organize groups structurally within an organization, as all of the members offer the same functionality and services.

For conversations that only apply to a given team as a whole — e.g., an announcement that the finance team is upgrading the software only it uses — it makes a lot of sense to create channels especially for that team. This point of view is less "team" and more department, and that's an important distinction. However, team channels are, overall, limited in usefulness, especially for a project-oriented business.

I make that distinction because companies often distribute work at the project level based on the teams involved rather than on the project itself. This is not an ideal situation.

What you end up with, in terms of Slack, are projects whose communications (and context) are broken up across teams channels, projects which become very disjointed as a result; this is sure fire way to end up with a more deeply siloed organization. You end up with the problem of being unable to answer the question:

> *Where do I go to find out about a project's details?*

Should you post in #marketing about the office move? #operations might make sense, but they're more focused on the company as a whole; your question might get lost or be ignored. #engineering, maybe? No, you have the same problem… too generalized, too departmentally focused; what if no one there even knows about the project? Projects need to be discoverable by anyone; Slack can facilitate discovery through consistent naming and use of project channels[2].

By creating project-centered channels, it's easier for people who are part of the project team (not the departmental team, to be clear) to easily join in and come up to speed. As Slack, the company itself, suggests, it's a good idea to even break a project up into multiple channels, like this for example:

1. #proj-new-website to discuss business level topics.
2. #proj-new-website-dev for technical topics specific to the project.

You might have more channels, broken up by sub-teams of functionality, or you might name them slightly differently. The point is that the project itself is the focal point and it's clear that a group of channels all relate to the same project. Get the project channels right and you'll get the communication about the project right.

Integrations

The other aspect of Slack worth noting and which is often overlooked is that of integrations. At their most basic level, integrations turn Slack into a super-alert tool, informing you and your team of changes to documents, status updates on issue tickets, and much more. Many of the most common and useful ones are free.

Using integrations to their full extent can take time and effort, however.

For example, in the software development realm, you can hook Slack up to GitHub which is used for decentralized code version control, continuous integration, and other software release patterns. There is a lot of underlying functionality you have to understand about not just Slack, but also about GitHub itself to ensure you're not simply bombarding each channel with too much data and not enough information.

As with most things,you have to strike a balance between the ease of pulling in additional information streams and the level of detail of those information streams. Not using an integration at all means you might lose a convenient and powerful way to check on the status of a task or project, but failing to fine tune the settings for your teams' expectations might result in frustration and abandonment of what might otherwise have been a useful function.

[2] Ideally, it shouldn't be the *only* way to find out about a project's details. Projects and other endeavors should be documented elsewhere, in purpose-met places.

The Core of Messaging

This second half of the paper is about policies and procedures sprinkled with a bit of philosophy and perspective which could apply to any organization. This is where we do the deep dive into using Slack to best serve your business and help you understand why certain choices might be made.

There are two major concepts across four sections in this part of the paper. The first is the ever important details of managing threads, which are instrumental in keeping context fresh and useful.

The three sections following thread management are about how we interact with one another in Slack in the business space, and how we consider those interactions in the context of not just Slack itself, but other tools (software or otherwise) that we also need to best collaborate with our colleagues and operate our businesses in a professional way.

🧵 Managing Threads

The heart of using Slack properly and effectively is through thread management, so much so it gets its own section.

Threads are an easy concept to understand, but much harder to master than one might think. The problem arises in the simple question of, what constitutes a change in the topic? Business conversations can be complex, and fruitful conversations can be long and winding, doubling back on ideas mentioned long before. It is through these conversations that we elaborate on and maintain a sense of context for the whole conversation, the whole project, the whole company. This needs a business definition:

> **con·text**
> *noun*
> The interrelated situations, environment, and information space that provide insight and further discernment into the meaning of written or spoken statements and business decisions or conditions.

Context is more than just the words (or thread) that immediately surround someone's post. Much more, and good thread hygiene is one way of making sure that context is maintained and kept intact.

The simplest way to keep threads,and thus context, managed is by taking to heart the concept that topics *start* on the main channel, but immediately *continue* in a thread. If someone asks, "Hey, where's the latest sales report," (which is a question that shouldn't be asked that often, mind you[3]), the reply of "Here's the link," should happen in a thread, not right after in the main channel.

[3] Because status, generally speaking (especially at the project level), should be easy enough and the location centralized and promulgated enough to find without having to ask for it in a Slack message.

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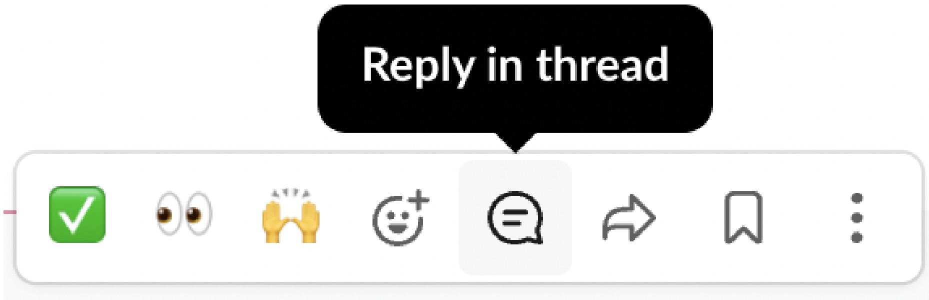

This is not a hard ask for anyone[4]. Highlight and reply in the thread. Are their exceptions? Yes, absolutely. But 95% of the time, your reply, and any follow ups to that reply, should be in a thread.

"But why are you making life so hard for me?," you might despair? Because:

> *The enemy of context is clutter.*

At a high level, a named main channel hosts a topic, a concept, an idea, a project, or a theme. The main channel is about *bringing* awareness and highlighting concepts, but it is not about *keeping* awareness or elaborating on concepts. That's what the threads are for.

What's not obvious about the main channel is that it should read as the historical narrative summary of what has been happening within. I should be able to skim `#proj-move-offices` and understand what's going on with only a little bit of mental gymnastics. Because of the name of the channel, I know I'm not going to encounter something that would better fit in `#funny-pets-photos.` That would be disconcerting. *Very* disconcerting.

But what would be almost as disconcerting is skimming through the stream of consciousness of replies thrown haphazardly into the chain of the main channel. Yes, they are relevant to the main theme, but *only to the conversation that spawned the thought.* They are **irrelevant** to the main theme of the channel, or topic before or after. The longer these main channel ad hoc streams are, the harder it is to find and derive useful context about the channel as a whole.

The main channel should be kept clean. It doesn't have to be pristine, but it should be coherent. threads are where people are allowed to go a big wild and make a mess of things, because the context is all in one place, the thread itself. If a thread is never created for a conversation, it also runs the risk of being overrun by another topic where the replies are also happening in the main channel.

[4] Though sometimes it can feel like it. For instance, in phone text messaging, it's a common occurrence to correct a misspelling by sending a new text message, e.g., "I meant 'food' not 'good'," and this habit is replicated in Slack, sometimes egregiously. When you can edit your post directly, there's no good reason *not* to correct the spelling in situ and clean up the context space while you're at it.

Important versus Interesting

Why is this such a problem? Because instant messaging is, by design, asynchronous and with that necessitates a change in how we communicate.

Have you ever been in a conversation where the answer to one question spawned another question in the midst of you waiting for a reply? Then the text thread becomes a jumbled mess of "I meant for that other question" sort of replies?

This is especially problematic in the business space; it's easy for someone to start one topic that is important to note for the channel as a whole, but an instant later someone else brings up another topic that is perhaps of greater interest to the *current* readers; those people actively engaged in the moment.

If the current readers decide to continue the stream of replies in the main channel, that important note gets pushed up and out of sight, away from the eyes of *later* readers. All the late joiners see is a conversation without any context, unless they're willing to scroll back up (where they might still miss the previous important topic that preceded the interesting topic). The channel's content is useless to all but those immediately involved in the initial conversation. It's like coming half way into a water cooler conversation where no one wants to repeat what was already said.

Past, Present, Future

In Slack, we have to be cognizant of not just who the audience is in the present moment we're writing the message, but who will need to read it later. @mentions are useful for pulling people into a thread that might need awareness and can read it later, but if your target is someone saturated in alerts already, then @mentions become useless.

The *benefit* of asynchronicity is that you can post something and the audience can reply on their own volition and timing. The *problem* with asynchronicity is that it may be some time before someone gets back to your post, in which there is plenty of time for other information to distract them.

It's not a big problem if people are conscientious about what and when they're posting and how they're going about managing their mentions. The occasional slipup of a reply inside of the main channel isn't going to do any damage.

However, if it's a trend on the team, then it will do damage in the long run (and sometimes even immediately, if non-related topics start interweaving with one another). You may be instantly communicating, but then the team and org is losing the value of keeping the context clean. You might as well just be texting over your phones.

Casual-ity

More to the point, it's about the approach to communicating that is at odds here. Slack is often selected as an instant messaging platform because it allows for more casual conversation between colleagues, clients, and customers. But casual does not mean "less-professional." One can maintain professional standing while still offering a casual, even relaxed air.

Business casual is about tone, delivery and intent. It's also about being aware of your digital surroundings and your relationship to those you work with and for. It's about thinking about the overall context of the work being done. It's not just the words you type, but how you organize the digital landscape you're in as well. We live in a modern world with modern sensibilities, but coming back to the cheat sheet, we must remember:

> *Business first.*

And in the case of Slack, part of a business-first approach is:

1) Keep context clean by clearing the way of clutter.
2) Take the time to tidy up your little messes: fix misspellings, clarify a comment, add a summary to help others come up to speed more quickly. Use the edit function to make things neater.
3) Remember that you're posting not just for the present, but also for posterity.
4) That people can get alert-fatigued, so don't over do it with the @mentions, especially @channel.
5) If you're posting something *interesting*, make sure it doesn't unintentionally subsume something that is more *important* from earlier.
6) Support the posts of others; follow up if you can offer value, even if that just means bringing the topic to the attention of a subject matter expert that isn't yourself.
7) If a post (or full thread) doesn't contribute to the context of the channel *and* it distracts from the conversation, then delete it. Both criteria have to be met; *don't* delete it just because you don't like it or are having second thoughts. When in doubt, keep[5].
8) Leverage integrations with your other software tools so that communications are directly aligned with the source of record.

[5] The subject of allowing someone to delete something (not just in the instant messaging context) can be a touchy subject. Even so-called "bad" ideas can provide useful insight if the idea was allowed to flourish in a positive environment. However, sometimes people can be a bit overzealous about deleting too much, often because of perceived embarrassment, so my recommendation is to leave permission to delete to a limited number of people who have at least a partially objective perspective.

Thread First Thinking

You can do all these professional items in a casual way and the best way to keep business first when using Slack is by thinking and acting in a thread first manner. Remember: Start a topic on the main channel, but continue the conversation in a thread.

> *When in doubt, spin a thread.* 🧵

🤝 Collaborative Engagement

Business instant messaging is often categorized as a collaboration tool. This part of the paper talks about how we might best use this tool truly collaboratively, which we'll define here as:

> **col·lab·o·rate**
> *verb*
> To work together jointly in a professionally cooperative manner towards a common business goal.

Collaboration can happen in many different ways: Brainstorming, in meetings, casual hallway chats, watercooler conversations, formalized discussions, open video channels, and more. Slack in particular creates a space that simulates the environment of being close to colleagues but 1) without having to be co-located with them, 2) conversing asynchronously[6], and as a consequence of that, 3) keeping a log or history of what was discussed.

Collaboration, I'd argue, works best when people are familiar and relaxed around one another, free to suggest topics and discuss ideas in depth without fear of repercussion. A casual environment is an ideal environment for collaboration, even in business — but with caveats. All work and no play is good, but work still needs to be done.

Messaging, as I noted in the brief on historical context, lends itself to being casual in nature. With the ability to ask questions and get responses and even using emojis as substitutes for IRL facial expressions, it's easy to see why companies like using Slack as a communication tool.

Not-so Casual Slack

Slack's ease of use, through its distinctly casual interface, can make it seem like you're almost in a meeting or you've just crossed paths with a co-worker in the hallway, right? But, of course, Slack is not a substitute for meetings or other face-to-face encounters.

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[6] You can also converse synchronously over their Huddle feature. Don't forget to take notes.

It's not even a substitute for video conferencing. Instant messaging, of any type, really is its own method of communication, rife with many of the same pitfalls of IRL, but just as many issues unique to itself.

Yet, we're prone to conflating our use of Slack with our use of other tools. Slack is hyper-convenient and it also appeals to our innate desire for connectedness. It can create this space of casualness that can cause us to slip up and think we've done something meaningful when really we haven't. In particular, collaborating and making requests of other people.

It's a Trap!

Leaders engaging their teams with instant messaging are at risk of thinking that their requests are real — more real than even casually asking someone to do something when passing by the hallway.

Despite the fact that you wrote in post in the `#proj-moving-office` channel, "Hey, @alice, please make sure that the contract is signed" does not mean, in any way, shape or form, that Alice will do that action, even if she replies, with, "Got it, will do." Nor, will I argue, *should* she accept that request as being mandatory.

Slack is not a task manager. It's also not a meeting place or a calendar. Any requests made through Slack should be considered tacit at best. If, as a leader-manager, you're serious about something getting done, it should be part of a wider set of tools and operations.

Slack is, as noted, a collaboration tool; and collaboration tools are leveraged more fully when used in conjunction with other software and policies, software such as a task manager or a customer relations manager — whatever tool better stores and organizes the results of collaboration, but not necessarily Slack. This distinction is important:

> *The tools your team uses to collaborate are not necessarily the tools your team uses to report, organize, and manage itself.*

The Task Duck ✅ 🦆

Here's what I tell my teams:

> Regardless of the source (in your own head, Slack, email, conference call, or a casual conversation), if it sounds like a task, feels like a task, or acts like a task, then it must be a **task**. Once you recognize that for yourself or from someone else, create an action item [or whatever it's called in your operational vernacular] and add details there. *Immediately*.

The corollary of this is, "If it's not in the task manager, it isn't really a task." Thus, if you're a leader asking for something to happen in Slack, and you really want it done, what you should expect in return is some way, outside of Slack (or through an integration), to track that request. You can create that yourself, or if it's part of your culture, the person you asked can create it.

But what shouldn't be expected is for Alice to get a message from you in Slack asking, "Hey, what's the status on that request I made?" because statuses aren't tracked in Slack. It's tracked somewhere else.

> *Don't request statuses in Slack. If it's important enough to have a status, it's important enough to track in a purpose-met tool.*

Action Agendas

As with tasks, Slack can cause problems in the realm of time management. Slack has a few very useful scheduling features, in particular the "remind me about this" feature (and its in-line cousin, the `/remind` command) and the schedule message feature, which are great for personal managing time, as well as the ability to integrate with all of the most common calendaring software out there.

The place where teams get into trouble is managing event agendas through Slack. It's the habit of posting the agenda in the project Slack channel with the additional tag of"Here's the agenda!" and expecting everyone to see it.

Just like with tasks, there is a place for agendas where everyone should go to find it: the calendar event itself. Likewise, the results of said meeting should go in the meeting notes, and action items followed up in the appropriate task manager.

Use the tool that is best suited for what you're trying to accomplish. In the case of setting up events, Slack is ideal for planning and ideating about a particular event; it's ideal for collaborating. But once the date, time, and agenda are set, another set of tools need to be leveraged: calendars, documents, tasks managers, and so on. That is, all of the other tools in your company that aren't instant messaging.

Wider Operations, Closer Sources

Slack is not the end all, be all solution for a business. It's obvious that you wouldn't have the finance team balance the budget by making entries into Slack messages, so why should you expect a developer or executive admin to maintain their list of tasks inside of the app?

Slack should be part of the wider operations of your business efforts. Again, because an instant messaging tool creates a sense of connectedness, not unlike being with someone in person, we are prone to forgetting that it's just a tool. As noted before, we conflate the ease of communicating through instant messaging as if we're actually getting other things done. Not so.

So when you're asking for something to happen, or looking for status on a project, or looking for a design document, your first instinct should not be to look towards the instant messaging app. It should be the tool closest to the source of what you want to know.

> *Slack is about the human level of doing business, not the operational level of doing business.*

✉️ Regarding Direct Messages

One way to collaborate is through the ritual of the one-on-one. Such collaboration is limited, however, in that it can, and often does, exclude a lot of other people. Direct messages are a holdover from the general idea of texting: conversations that are generally one-on-one or for just a small group, but that concept isn't conducive to weaving a professional, fully collaborative environment.

The general rule is: *Avoid direct messages by default*.

That's not to say you should *never* use DMs. In fact, a large portion of your communication might be via DMs in a given day based on circumstances. Your default, however, should be open, not closed communications. A majority of the company's overall Slack conversations should be through discoverable channels, public or private[7].

Whenever you're about to type out a DM to someone, consider the question:

> *Who might miss out on positively contributing to this conversation?*

This is the key thought everyone in the org should have before sending a DM to anyone else (or group of anyones).

When to use DMs

Direct messaging is great for certain sorts of topics that require being kept to a limited viewership and those topics can be fairly well-defined.

Examples of when DMs should be used when:

1. The topic is definitely private or personal. For example, HR or a boss talking to a report about behavioral issues.
2. A friendship exists and the topic is completely unrelated to business and is just for fun.
3. You're checking up on someone, perhaps because they haven't responded recently and you expected them to, or because it's a quick one-off ping to get them to take action.

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[7] See the section on *Public or Private?* for details.

4. You're working with a small group in an initial pre-planning discourse, such as to brainstorm something that will be eventually shared in a normal channel.

If the goal is to maintain a professional business environment, then you need to understand that DMs, but their very nature, is for hiding information away from the wider organization. While there are many good reasons for doing this, the hiding nature of DMs should always be kept in mind.

Otherwise, you should be favoring having conversations in normal channels, which offers more opportunity for coordination and collaboration. Let people see what you're talking about with someone. Let them chime in. Have the courage to let your deliberations and exchanges be challenged by others for the sake of everyone, yourself included, to learn more and build trust.

> *Let knowledge spread osmotically.*

On Sensitivity

One situation I've encountered often is that of using DMs for so-called "sensitive" topics. As you might have seen from the section on *When to use DMs*, there are definitely sensitive topics that are best addressed by keeping communications limited to a core group of people, but those are "business sensitive" in nature, rather than personal. This sort of formal sensitivity is defined by:

sen·si·tive
adjective
> Concerned with information that is classified or restricted to a group of people or well-defined relationships as a matter of policy or regulation, e.g., employer and employee.

This is why an HR person might use a DM in order to have a sensitive conversation with an employee. The two of them have a well-defined relationship as a matter of policy, not as a matter of being colleagues working on a project.

What I too often have seen, or discovered later on, is the use of DMs in order to spare someone's feelings, when the reality is there probably wasn't a need to and sharing would have led to better results for the individuals and organization as a whole. Personal sensitivity is real, and something we should all be aware of not just in ourselves, but in others — the need to be empathetic is real, but we must recall we are also in a business mindset when working.

The problem is that we're all sensitive (in the broad sense of the word) in different ways, and sometimes our personal sensitivity is dialed up a notch too high to be effective in the business environment, so we revert to, "let's not hurt each other's feelings in public" and open a DM channel to have a conversation about it.

While it'd be easy for me to say something like, "we all just need to grow a thicker skin," there's a bit of subtlety to all of this; it's not just as cut and dry as being more walled off from your co-workers. It's more about being more accepting of your own foibles and that of your colleagues. To make this tangible, let me address it through a common habit and fear we all have: Our tendency to blame and feel like we've been blamed.

People make mistakes, all the time, small and large. But what I've noticed in the business environment is that we're "sensitive" to mistakes of our own and others to a point where we're unwilling to address the mistake publicly and professionally. Instead, we revert to DMs in an effort to hide what we've done or limit the sense of blaming or risking being blamed.

A more concrete example is when a developer introduces a bug into the code base. Depending on who finds the bug depends on the typical response might be:

1) A co-worker finds the bug; the response is a DM to the offender: "Hey, can you fix this?" in an effort to keep things low key. There may be an underlying blame element here… or not.
2) The developer finds it themselves; the response is they fix the bug and maybe no one is the wiser, fingers crossed. There may be an element of shame, rather than blame, here.
3) The developer finds it themselves, but they DM their lead to let them know, "Hey, I messed up; fixing this right now." They want to do the right thing, but shame persists, so they share with a limited audience.

All of these scenarios are non-ideal. Why? Because they all violate the tenet of the question, "*Who might miss out on positively contributing to this conversation?*" In all cases, between zero and two people are truly aware of the situation. On a team of three or more, that's not helpful. Someone is missing out.

Sharing this information in public opens the doors to, at worst (in positive culture), knowledge of the current status of the system, and at best, a timeline to fix and possible solution that everyone is aware of. On top of that, there's a tacit record of the change[8], possibly a lesson learned by more than one person, and an increase in trust between colleagues.

None of those benefits are available to any person who DMs out of concern of the topic being "too sensitive." In this scenario, there was no need for blame, just a need to inform and solve, so need to be sensitive in the typical, and overused, sense of the word.

Instead, your team should embrace sharing information. If you get a DM from someone that feels like to you that they're being sensitive about the topic, gently nudge them towards sharing in an open channel. "Hey, can you restate this in the #proj-office-move channel instead? I think other folks might like to chime in with thoughts."

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[8] Never, ever, rely on Slack for recording changes, however. This information should be recorded in some separate work management tool.

The culture of the company should be supportive and this should be an easy ask for most people. If it is not conducive to this sort of request… then that's where you might want to have a wider conversation that goes beyond just direct messages and look into your company's core communication values.

Further Tips on DMs

Beyond personal sensitivity DMs, which should be of a rare breed if the company full embraces transparency through open channels, let's recognize that there are essentially two main flavors of DMs

- "Real" DMs, which are either between two people discussing private issues relevant only to them and not a project or business need.
- "Pseudo" DMs, which are held between groups of people about a business topic that could otherwise be shared in a channel. Avoid these as much as possible.

Real DMs are expected and necessary parts of good communication within a company. No need to elaborate on what's already been discussed above. It's the pseudo-DM that can give us some further insight on DMs in general.

Along with the question, "Who might miss out on contributing to this conversation?", let's add:

> *What's the context of this conversation?*

One of the powers of instant messaging is that someone can find context in a ready fashion. Unlike a face-to-face or video conversation, you can see after the fact how the topic evolved and glean insight that might otherwise be lost to the aether or dissolved to nothing in esoteric, incomplete, or poorly written notes or documentation.

Pseudo-DMs maintain *some* context because the conversation is being tracked in Slack, but it's not being shared with the wider, more public forum, so the wider context is lost. Pseudo-DMs usually take the form of a group of people with good intent, but they either forget that the rest of the world is out there, or they purposely are trying to limit access for some reason[9].

How do you recognize a pseudo-DM, and how do you, and the other participants, get out of it?

1. If you're in a DM with more than two people, already you're probably looking at a pseudo-DM. Is anyone missing that should probably be involved? Why were the current cadre of people selected and not others?
2. There's already a channel that could be used for this topic. In this case, simply ask the group to move to the channel and create a new thread summarizing what was discussed. The

[9] I mean beyond the expected reasons for using direct messages; here, I'm referring to more oblique reasons, such as habit, trying to maintain a facade of control, or perhaps undue sensitivity to the subject.

earlier you can get out of a pseudo-DM, the less typing and re-contextualizing you'll have to do.

3. In a one-on-one DM, it's expected that it might last indefinitely, but that doesn't mean the two of you won't stray into pseudo-DM territory on occasion. If the topic being currently discussed could be shared, it should be shared.
4. Pseudo-DMs are sometimes created as one-off auxiliary conversations. Once in a while, that's fine. However, if you're pushed into these too often, where someone or some group wants to keep having side chat, consider having a wider conversation about why this is happening. It could be indicative of a more insidious cultural problem.

Getting out of pseudo-DM is the same as with any DM: just say you think the conversation needs to happen in the broader applicable channel or a new full channel. Channels, unlike DMs, put light on a subject and offer a lot more flexibility and findability. The act of naming a channel forces you to think about what really needs to be discussed — openly.

🎻 Slack, Orchestral Edition

While Slack is amazingly easy to use, I think you can see there are challenges that are hidden from immediate view that come as a result of its ease of use. I think that's a general reality check for not just Slack, but *any* piece of software.

To be most effective, you and your teams have to learn how to use all of your software tools in an orchestrated way. Software interacting with other software is hard enough to figure out on its own, but then getting that software to work within the scope of a company full of humans? Seemingly impossible, made all the more difficult in a fast-paced environment and within a broader culture where "TL;DR" is a widely used acronym.

This is where the social and cultural components need to be considered. We're familiar with the concept of software-as-a-service, SaaS, but that's an incomplete view. Software only partially solves anything. It takes human interaction and coordination in concert with software, processes, and especially company culture to really have a solution for all sorts of business problems, small and large.

You're not Alone

Slack has been the focal part of this article, but I hope you see that it really has been the conduit for creating a wider point of view about how you and your organization approaches using software tools like instant messaging. No tool works in isolation. A hammer needs a nail to "work" and neither are useful without a woodworker to swing that hammer and two pieces of wood to secure.

Using any tool takes time to learn; it takes even more time and effort to fully orchestrate the efforts of a business with all of the software choices out there. You don't have to go it alone, however.

Internally, look for bright-eyed, eager people who are systems thinkers. They should be obvious to spot, as they are often trying to tweak the existing systems that are in place. Give them the opportunity and time to learn the details of whatever tool, do some additional research to come up with a proposal for best practices.

Challenge your own way of thinking — most of the time, we do things out of habit. If there's a new employee who is coming on board, ask how their previous did things in their previous company, be it systems or the social level. They might offer a new perspective. Ask what they'd do differently. (and don't just ask new employees, ask your current ones too.)

Be observant. Look for patterns in how you get annoyed. It's easy to get lost in the rote madness of doing the same thing the same way all the time, but there may be a better way if you dig into the small places where you don't feel like one particular step is the best step. Then extrapolate up from there!

Externally, get opinions from other companies. What are they doing that's different? It's probably worth having a face-to-face or video-chat with a peer to get a perspective shift. I've done this a lot and learned something from each encounter — even if that thing I learn is that oftentimes silly or dangerous habits aren't isolated to just one company.

One thing I find interesting is how easy it is for companies to not see their operations as whole in spite of understanding their processes in detail. It's the problem of being too close to the problem.

So, another place to get perspective is from a consulting organization, someone who can come in and make observations about what you're doing and insight into how you might do things differently, more holistically, and hopefully more culturally in tune. I'd be glad to help in that regard. My services are available to you and I love talking about this subject at length, as you can tell by this long paper.

🙏 Thank you

Thank you so much for taking the time to read this far. Whenever I write a long-form paper, I'm reminded that we live in a short-form world. Bullet points, TL;DR, tweets. It's easy to think that no one really reads beyond the fold or the first paragraph anymore, but you've shown that simply isn't true and for your efforts, I'm truly grateful.

I hope that this article has likewise been useful to you and that you can make use of the concepts within your organization. My goal has always been to make the struggles of running even the most complex and sophisticated business easier. My approach is always to view the details of the daily grind and see how tiny fixes might be amplified into greater, more holistic solutions for the wider organization. Much of my experience in business has taught me that positive corrections to the human elements have the greatest impact on the technical and business elements, more so than just adjusting proverbial knobs and seeing what happens.

I'm equally available for conversation or consultation and definitely on software and operational topics far beyond Slack and instant messaging. Feel free to reach out to me at any of the following channels:

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Thanks again for your time and energy. Best of luck on growing your business to new heights!