

## Getting Started in Slack

### Set up your account

Connect to our workspace by clicking [this link](#). You'll be asked to enter your name and choose a password. If you use Slack for other purposes, you'll still need to go through this process.

### Update your profile

Once logged into Slack, consider editing your profile by adding a picture and updating your display name (i.e. the name folks will see when you post). You can also edit your preferences and notification settings. You'll be prompted to edit your profile the first time you log in and you can update it at any time by clicking on your profile icon on the top right side of the screen.

### Start chatting in channels

Slack uses channels to organize conversations around certain topics. When posting a new message, pick the channel that appears to be the best fit (you'll find all channels listed on the left side). We'll begin with the channels listed below but we can expand as necessary. Start by introducing yourself in the #general channel. Use any of the other channels to initiate conversations and begin interacting with one another.

- #general – a catch-all for general Financial Coaching topics
- #resources – share new resources, ask questions about specific resources
- #best-practices – offer & ask for tips on successful Financial Coaching practices
- #successes – celebrate client & coaching success stories
- #webinars – share webinars relevant to Financial Coaching

### Threads, mentions and direct messages

- Conversations within a channel are referred to as threads (and help make discussions easier to keep track of). When answering someone's question, please reply on that thread to keep the conversation together. Hover over the message and click the "reply in thread" icon to begin your reply. Start a new thread anytime you're introducing a new topic.
- Mentioning people in Slack is a great way to draw their attention to a certain message. As you're writing a message, enter the @ symbol and then enter a member's name or select one from the list of members (repeat this step for every person you'd like to mention). For example: "What are your thoughts @Suzy?"
- Direct messages work well for one-off conversations that don't require an entire channel to weigh in. You can message people (or a small group) individually from the left side menu.

### Check out the Help Center

Slack offers a very comprehensive [Help Center](#). Below are some topics of interest:

- [Introduction to Slack and learn how to download the mobile or desktop app](#)
- [Manage your profile, set your preferences and adjust notifications](#)
- [Using Slack – replying on threads, sending direct messages, mentioning someone in a thread](#)

### Reminder – the purpose of our Slack space

This is a space to share your experiences with each other. While FC staff are on there (and might chime in time to time), it's primarily meant to facilitate coach-to-coach interactions. Get to know your peers and rely on one another for support!

## Reminder – what to avoid

- Correspondence that you typically direct to staff members should still be directed via email/phone (i.e. scheduling assistance, credit report requests, notes on a specific client, etc.).
- Please do not share clients' personally identifiable information – i.e. name, date of birth, etc. It's okay to describe their situation or include a faux name (like everyone's favorite JoJo Fake)...but please do not include any details that could reveal a client's identity.

## Basic site overview

The screenshot shows a Slack interface for a channel named "#best-practices". The interface is divided into several sections:

- 1**: The top right corner, containing the user's profile picture, a notification bell, and a help icon.
- 2**: The left sidebar, which includes the "Foundation Communi..." header, a "Get started" section with the instruction "Finally: Assemble the team", and a list of channels. The "# best-practices" channel is highlighted in blue.
- 3**: The "Direct messages" section in the left sidebar, listing contacts like "Eliana you", "Eliana Fake", and "Erika Leos".
- 4**: The message input box at the bottom of the channel, which contains the text "Message #best-practices" and various formatting icons.
- 5**: The main content area of the channel, showing a "Today" separator and two messages from "Eliana": "joined #best-practices." and "set the channel description: Offer & ask for tips on successful Financial Coaching practices".

1. Update your profile, preferences and notifications by clicking on your picture/icon.
2. Find the channels on the left side; choose the most appropriate one when creating a new thread.
3. Find direct messages to you (or reach out to others) on the left side.
4. After choosing the best channel, start a new thread by typing in the message box.
5. Check out other threads in the channel. If you want to chime in, reply on that thread.