

SMART SALES OPS

Converting **Slack** Messages
Into **Salesforce** Leads Using GenAI



Executive Summary

In today's fast-paced digital sales environment, conversations move quickly, often taking place on collaboration platforms like Slack. However, critical lead information shared in these chats often remains siloed, never making it into core CRM systems like Salesforce. This leads to missed opportunities, lack of data visibility, and inefficiencies in the sales pipeline.

This paper introduces a **GenAI-Powered Solution** that transforms Slack messages into structured Salesforce leads, without requiring additional Salesforce licenses for all users. By integrating **Slack Workflows, Salesforce Prompt Builder**, and GenAI, organizations can empower their broader teams to participate in lead capture and qualification directly from Slack, ensuring faster follow-up, better CRM hygiene, and **Improved Conversion Rates**.