

THE

Transformative Power of Workato



workato

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INTRODUCTION

Transforming businesses faster

1.3 trillion dollars. That's how much enterprises are expected to invest in digital transformation initiatives in 2018. Their goal is to apply digital capabilities to improve efficiencies, increase customer value and create new monetization opportunities.

Sounds great right? Well, research from McKinsey tells us that 70% of these initiatives will not reach their stated goals. That adds up to over 900 billion dollars of spend wasted.

What Went Wrong?

Change is happening in organizations -- and with the technology they use -- at such a rapid rate, it's no wonder so many digital transformation initiatives are missing the mark. The urgent Digital Transformation imperative, and the explosion of Cloud apps and APIs unleashed by it, has become both the biggest opportunity and an existential threat for companies.

Businesses must transform into dynamic digital companies, following in the footsteps of innovators like Amazon, Salesforce, Netflix, GE, Starbucks, and Walmart and avoid the fates of a Blockbuster, a Borders, or a Kmart.

All of this has meant an incredibly high rate of change across the board:

- In the business strategy as new threats and opportunities emerge.
- In the number of apps and cloud, big data and AI technologies being adopted.
- In the markets and competitive landscape.
- And even in their own employee and customer expectations which are set by the revolution that's been happening in the consumer tech in their lives.

Such high level of dynamism has put tremendous stresses on business and IT groups across the company to speed up the painfully slow transformation programs.

There are the two major problems holding back companies today: one is a technology gap in the technical capabilities required to for modern integrations and the second is a social gap in the form of Business-IT divide.

Workato: Empowering Everyone

We founded Workato to create a new type of platform, an Intelligent Automation platform, that addresses the Technology and Social Gaps in today's dynamic business environments. For companies to meet their digital transformation initiatives, they need a platform that does more to support the technical requirements of digital transformation and works differently to align your organization, business users, and IT with common tooling.

Functionally, the Workato platform does the following to address the Tech Gap:

- Dynamic Integrations to handle the scale, speed, and change of today's integrations.
- Intelligent Process Automation to drive better customer journeys and experiences.
- Intelligent bots to help workers harness their apps and get their work done from chat apps like Slack and Microsoft Teams.
- Provides a Customer 360° view to get complete, correct information about customers where it's needed.
- Workflow-as-a-Service for smarter, simpler B2B and BPO workflows at sale.
- API Gateway & Services for reuse of workflows; drive API adoption by business users.

Operationally, Workato delivers the digital native experience necessary to fix the social problems slowing down Digital Transformation and empower all.

A Digital Native experience consists of four things:



Enabling business and IT—not just integration specialists—to create, maintain, and operate powerful automations.



Driving collaborative, secure, policy-based IT Governance to ensure transparency, security, privacy, and auditability across your digital projects.



Enabling supportive (rather than just control-oriented) teaming via a role-based collaborative integration project lifecycle, delegated administration, encryption of data, and selective data masking of sensitive fields.



Harnessing the power of community within your company and across your industry to get better automations done more quickly. Workato has created a GitHub of Automations, with over 150,000 public automations across hundreds of apps that can be cloned, reused, improved, and contributed back into the community.

Workato is the **only Intelligent Automation platform** and with it, we've seen our customers grow exponentially after their first automation.

What is a Recipe?

Workato Integrations and Automations are called **Recipes**.

Recipes are a set of steps in plain English that the Integrator creates.

The screenshot displays the Workato web interface. At the top, the navigation bar includes the Workato logo and links for Recipes, App Connections, Tools, and Community Recipes. The user profile 'Nishtha Me' is visible in the top right corner. The main content area shows a specific recipe titled 'Case created/updated in Salesforce will create/update issue in JIRA'. This recipe is built using the Salesforce and JIRA integrations. It has been completed 984 times and failed 0 times. A 'Start Recipe' button is present, along with a status indicator that it was stopped 4 hours ago. Below the recipe title, there are tabs for Recipe, Connections, Jobs, Versions, and About. The 'Recipe' tab is active, showing a sequence of steps: a trigger 'New/updated Case in Salesforce' followed by four actions. The first action is 'Search issues in JIRA'. The second is a conditional step: 'If JIRA Search issues.Issues ID is not present then do'. The third action is 'Create issue in JIRA' with a sub-note 'Create issue in JIRA if none exists'. The fourth action is 'If JIRA Search issues.Issues ID is present then do'. A large teal callout bubble on the right side of the interface contains the text: 'These recipes power our automations and integrations. When the **Trigger** occurs, Workato will begin following the set of **Actions**.'

workato Recipes App Connections Tools Community Recipes Nishtha Me

Case created/updated in Salesforce will create/update issue in JIRA

984 Completed 0 Failed Start Recipe

Copy Delete Stopped 4 hours ago

Recipe Connections Jobs Versions About

Trigger

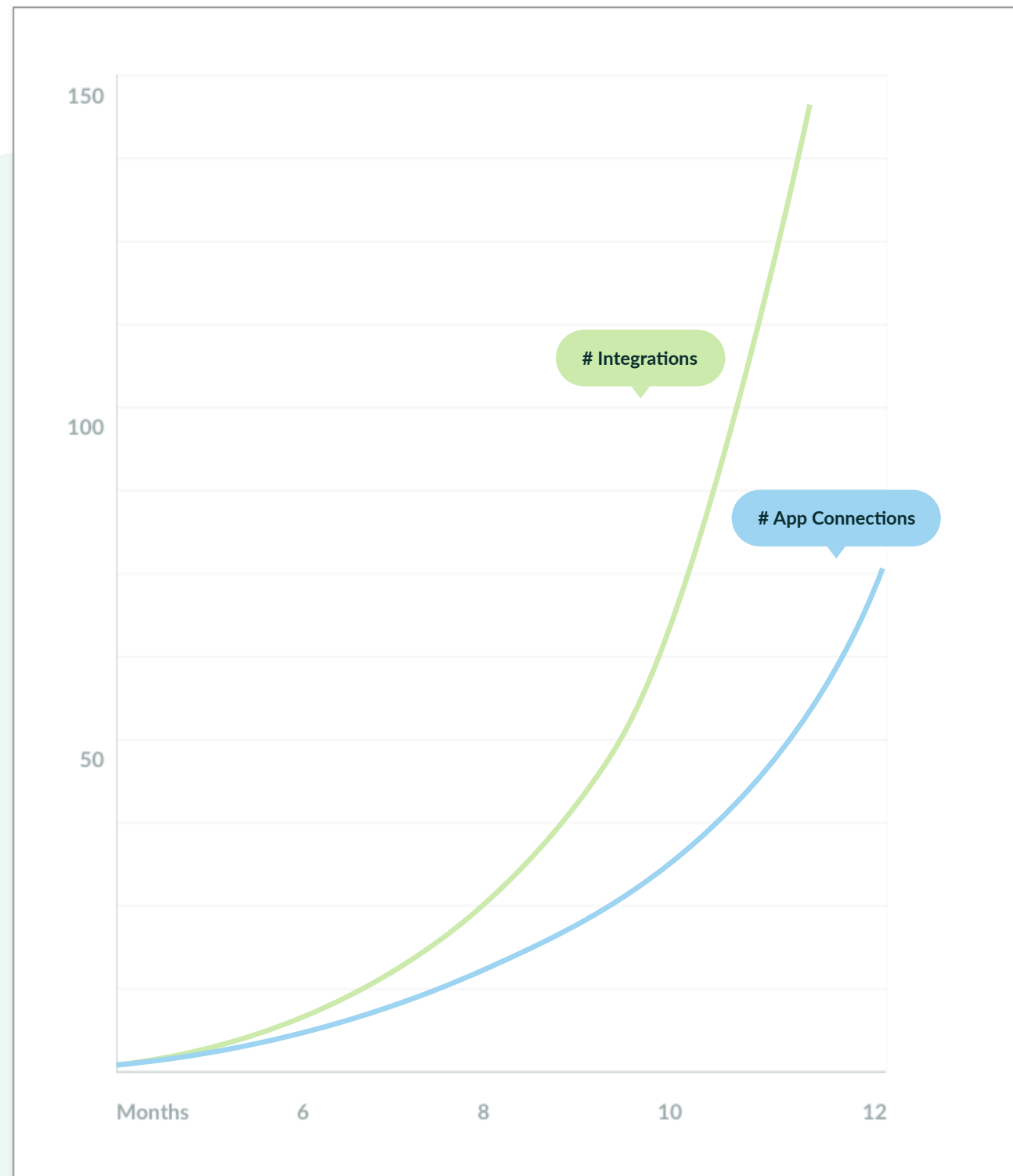
New/updated Case in Salesforce

Action

- 1 Search issues in JIRA
- 2 If JIRA Search issues.Issues ID is not present then do
- 3 Create issue in JIRA Create issue in JIRA if none exists
- 4 If JIRA Search issues.Issues ID is present then do

These recipes power our automations and integrations. When the **Trigger** occurs, Workato will begin following the set of **Actions**.

The Top Brands Grow with Workato



In this book, we'll profile some of our customers to show you how rapidly their usage and connectivity grew with Workato.

Each organization will have a chart measuring the following units by month:

INTEGRATIONS

- The Integrations line shows the number of business processes that the organization automated using Workato.
- Some examples of automated business processes include syncing lead data between Marketing and CRM apps, incident management workflows, automatic provisioning for new employee onboarding, powering support escalation flows and more.

APP CONNECTIONS

- The App Connections line shows the number of business apps, databases, file servers, IoT, and APIs the organization has connected to Workato to use in their automations.
- The organization might start with just 2 connections - say Salesforce and JIRA - but in the coming months also add connections to Workday, SQL, and many other apps.

INTEGRATORS

- Integrators are the number of individuals in the organization that created Workato integrations and automations to automate business processes.
- The Integrators' skill level can vary from experts working in centralized IT teams, to application admins in operations and Lines Of Business users in marketing, sales, support, finance etc.

THE WORKATO TRAJECTORY

What we've seen with our customers is a ramp up period in the first few months where they might have 5-15 active connections, 10-30 integrations/automations, and 2-5 people owning the creation and maintenance of these integrations/automations.

After about 3 months, we see an acceleration in their usage across all 3 categories. Companies begin to expand the use of Workato across multiple groups and departments, generally increasing Active Connections to 50-100 while Active Integrations soar to 120-200. The number and types of employees owning these integrations expand as well - from technical users to citizen integrators, admins and analysts. The 2-5 technical users in the first 3 months, quickly become 15-30 users with varied roles.

This pattern is only possible because of Workato's unique platform, which is designed to enable rapid integration and automation creation without compromising governance.

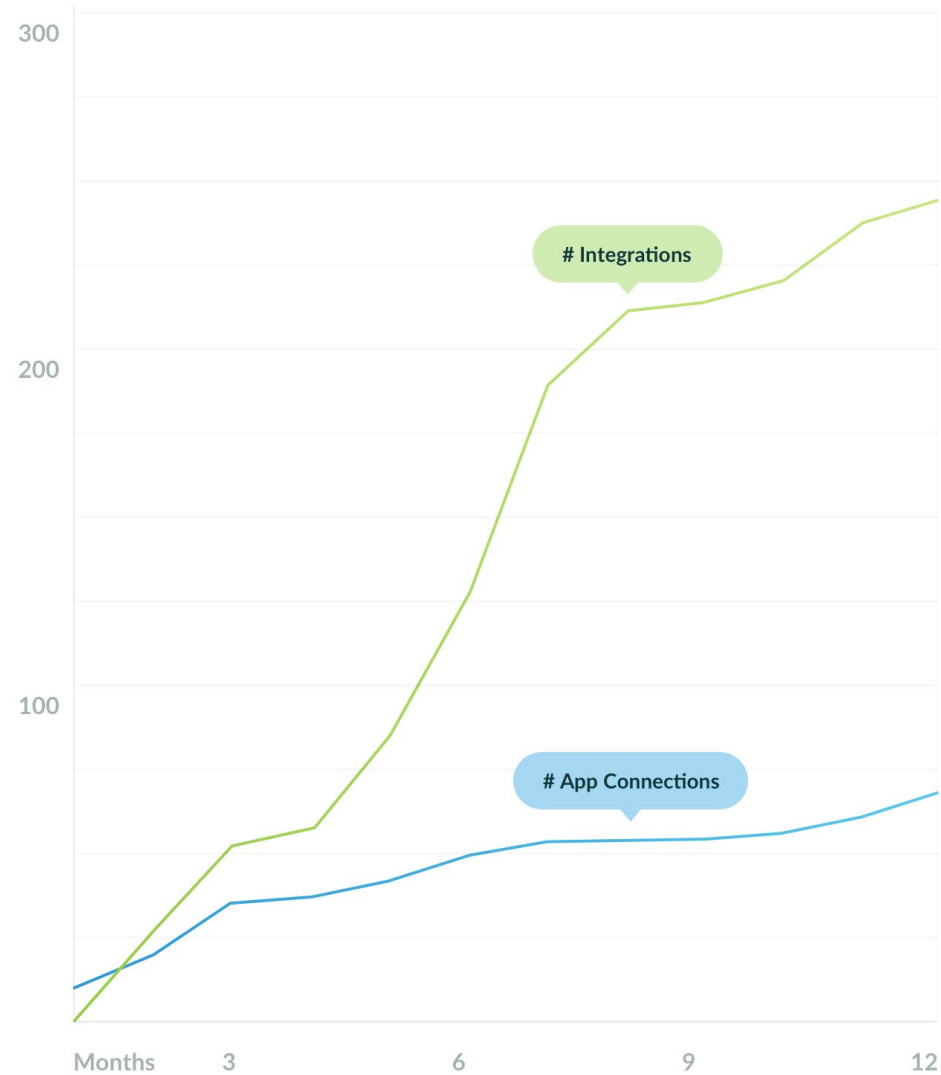


"Workato is such an easy tool to deploy, and then modify and expand over time. You can start out with one kind of recipe and as other tools become relevant you can just modify the recipes to connect further upstream or downstream."

Julien Bassan, Sr. Manager Business Development

Let's see it in action at some of the world's top companies >

The #1 Collaboration Software



246 integrations.
30 integrators.
11 months.

Buyer

Director, Enterprise Apps

Daily Active User Personas

2 Specialists, 4 Ad-hoc tech, 2 Ad-hoc non tech

Use Cases

- Cloud: Salesforce, Salesforce Marketing Cloud, Workday, Netsuite
- On-Prem: Product APIs, Custom HR app
- Digital Worker/Mobile: Slack Bots (Process)
- Data: ExactTarget batch integration (file based)
- B2B: Banking API

How the #1 Collaboration Software Company Uses Workato

“My Advice? Choose tools which will make developing and managing integrations a joy!”

- Enterprise Systems Manager at #1 Collaboration Software Company

The #1 Collaboration Software uses Workato for 2 types of connectivity:

The first is **traditional integration** between their custom HR app with the various cloud apps used by their lines of business.

The second is the act of **pulling information into Slack** from cloud apps like Salesforce and Bridge, and empowering employees to do work (like approval workflows) inside of Slack using custom bots that run on Workato's bot framework.

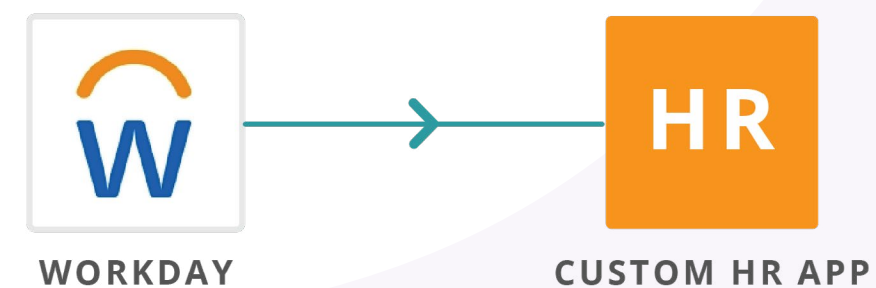
In the first 11 months of using Workato, they created **246 recipes** with **30 employees** acting as integrators.

[Let's take a look at what they made >](#)

INTEGRATING A CUSTOM HR APP WITH SURROUNDING SYSTEMS

Workato functions as an orchestration tool to sync data between a few of the company's custom systems. Originally, they had their own code that performed the integrations and they wanted to replace all of these custom solutions with Workato to make maintenance easier and the integrations more reliable.

The company uses a custom HR app that must aggregate data from several applications across the business including Sales, Finance, HR, Ops, Marketing and more. Workato automatically transfers many files from Amazon S3 to their custom HR app via SFTP.



For example, the enterprise uses Workato to create an invoicing tool. Workato listens for created or updated invoices in Workday and sends them to their cloud database in real-time so it can be recorded in their custom HR App.

AUTOMATING SALESFORCE MARKETING CLOUD PROCESSES



Workato also helps data move from the custom HR app to other places. For example, Workato syncs CSV data sourced from the custom HR app, from Amazon S3 into Salesforce Marketing Cloud.

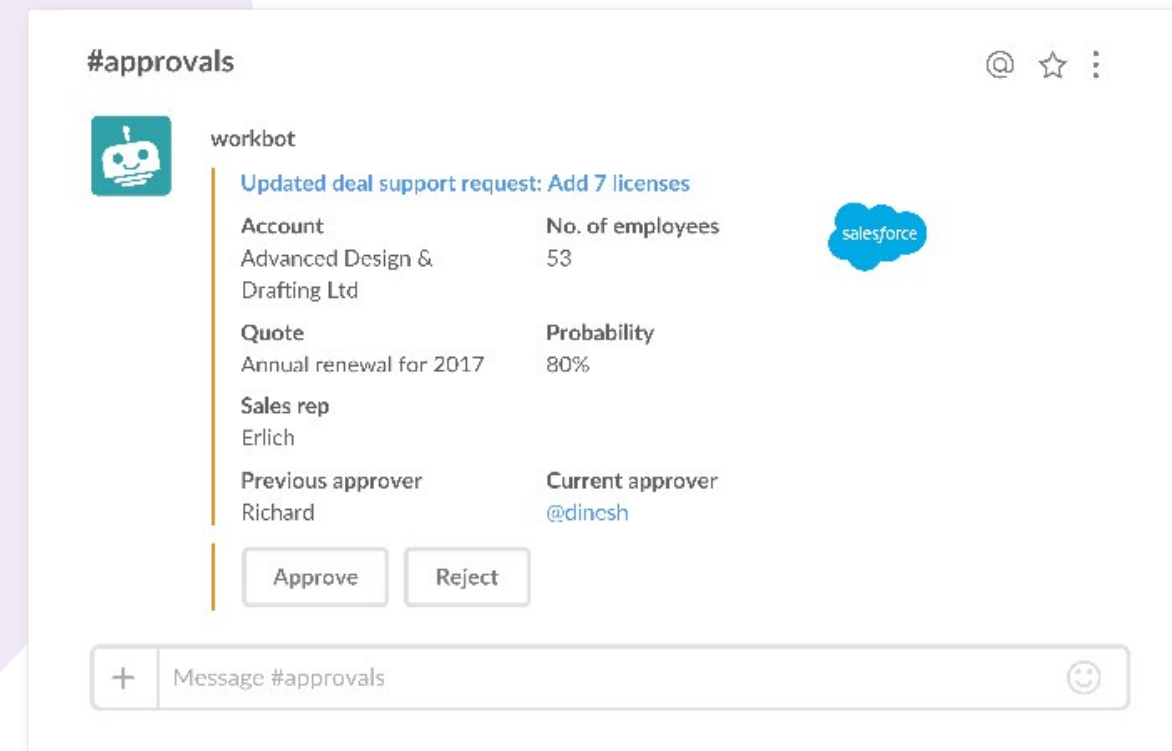
Salesforce Marketing Cloud is the company's Marketing tool that lines of business use for promo codes, billing reminders, email marketing and more. Within Marketing Cloud, data is stored in a format called "Data Extensions (DE)."

The organization uses Workato to upsert new information like team information, metrics, users, invites, promo code users etc. into the correct DE from several sources. For example, if customer data changes in their custom HR app, Workato will update the DE in Marketing Cloud as described above. Or if a new localization is created in their localization platform (ie. marketing copy in several languages), Workato will update the DE.

The enterprise will use Workato to upsert tens of thousands of lines into Salesforce Marketing Cloud.

They also use Workato to automatically populate their email templates in Salesforce Marketing Cloud's Content Builder, using the information in the correct DEs to automatically personalize and complete marketing campaigns.

DEAL DESK BOT: ENABLING SALES TO WORK FROM SLACK



The team at the #1 Collaboration Software wanted to create a Deal Desk inside of Slack to make it easy for their Sales reps and managers to get special pricing approved and view sales data inside of Slack.

To create Deal Desk Bot, they used Workato's Workbot - a bot framework that allows you to easily customize and create bot functions via Workato recipes. The company created a set of recipes to make it super easy for their sales reps to work with Salesforce and Xactly straight from Slack using buttons, drop down lists, and simple commands.

DEAL DESK BOT: APPROVING SPECIAL PRICING FROM SALESFORCE IN SLACK

When sales deals are being made, there are often price adjustment requests. Deal Desk Bot allows the management team to securely approve or reject these requests inside of Slack - something that only Workato can orchestrate securely thanks to proprietary technology.

In the organization, a specific group of managers must approve all of these requests and they wanted to be able to easily approve or reject without logging into Salesforce or flooding their email inboxes with request notifications.

Now, sales reps can request certain deal terms in Salesforce from Slack. Deal Desk Bot puts those deal terms into the correct Salesforce account and triggers a price request. The request goes to a specific Slack channel. A manager clicks “approve” or “reject” and Workato uses its proprietary technology to make sure the person who clicked the button is qualified to take this action. This ensures that sensitive activities are not carried out from Slack by unqualified people.

This Deal Desk workflow takes work collaboration to the next level. It provides the needed level of security while making collaboration between people (reps and management) and apps (Slack and Salesforce) a seamless experience.

DEAL DESK BOT: VIEWING PERSONAL GOALS FROM XACTLY IN SLACK

Another function of Deal Desk Bot helps the reps stay on top of their goals. They use Xactly, an incentive tool for sales, but instead of logging into Xactly every time they wanted to see how they’re doing, their reps can access the data from Slack.

Deal Desk Bot pulls sales incentive information from Xactly and posts it in Slack for reporting. For example, if a rep is trying to meet a personal quota, they might ask Deal Desk Bot how close they are to meeting the quota. Deal Desk Bot will pull the information from Xactly and display it in Slack as a graph or chart.

MONITORING CUSTOM INTEGRATIONS AND SMART NOTIFICATIONS IN SLACK

The company is also using Workato to monitor their own custom integration between Xactly and their cloud database. Workato will monitor the data transfer to make sure that the data successfully moved from Xactly to the database and if there are any discrepancies, Workato will notify the correct engineers in Slack.

BRIDGE BOT: MAKING EMPLOYEE EDUCATION SEAMLESS

Bridge Bot is another series of automations created on Workato's framework that automates Live Course Registrations and Course Expiration Reminders.

LIVE COURSE REGISTRATIONS

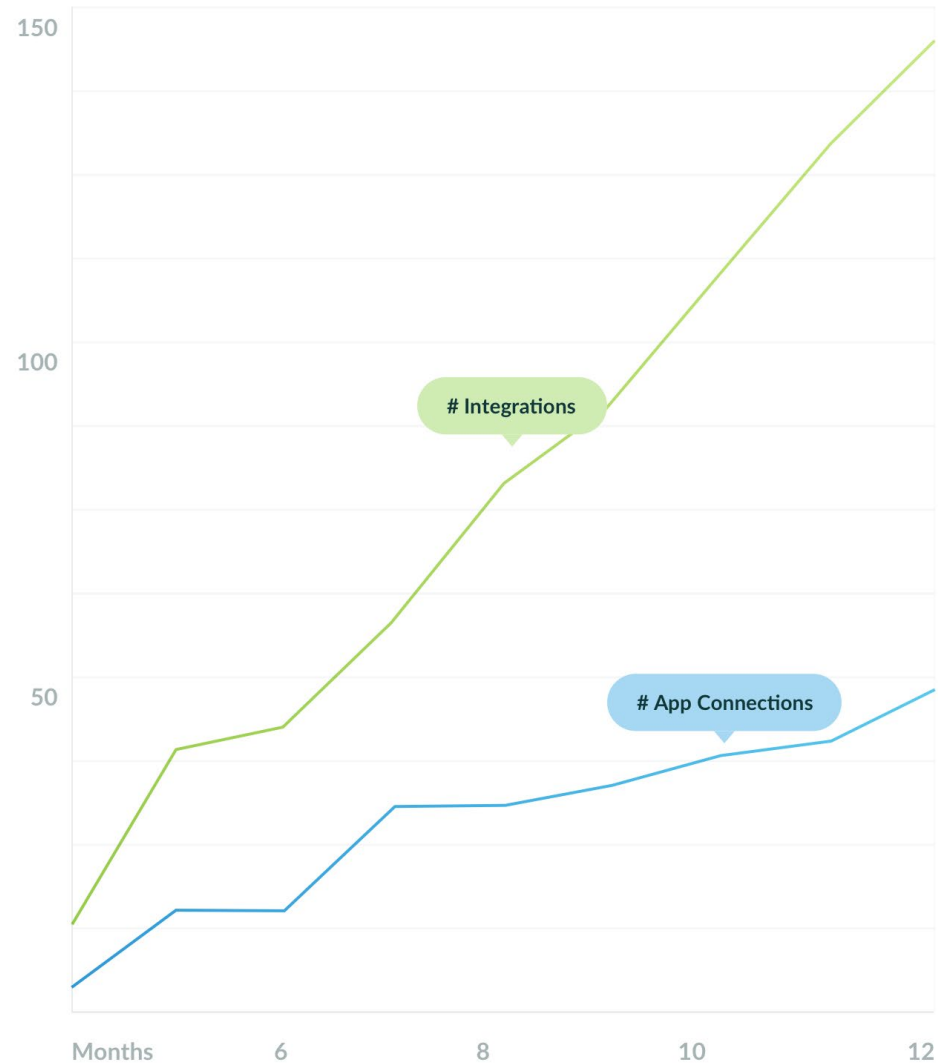
The company uses Bridge for employee education, which is a learning management tool that hosts learning resources, and Google Calendar as their organization's calendar system. Bridge doesn't integrate with Google Calendar, so it's hard to sync with employee calendars.

Now, whenever there is a new registration in Bridge, Workato creates a new item in Google Calendar and sends email confirmation.

COURSE EXPIRATION REMINDERS

Whenever there is an expired course that is required, such as a security course, the company needs to remind those who have not completed it to do so. Now, Workato will search for anyone who is due to take a course and preemptively remind them to take the course within the window of the course expiring. Workato does this by pinging them in Slack as Bridge Bot. Bridge Bot will remind the employee to take the course on a daily basis if they still have not completed the course after expiration.

The #1 eProcurement Software



133 integrations.
27 integrators.
8 months.

Buyer

Sr. Director

Daily Active User Personas

4 Ad-hoc technical

Use Cases

- Cloud: Salesforce, New Relic, GitHub, JIRA, VictorOps, Outlook, HipChat, Confluence
- Process: DevOps automation

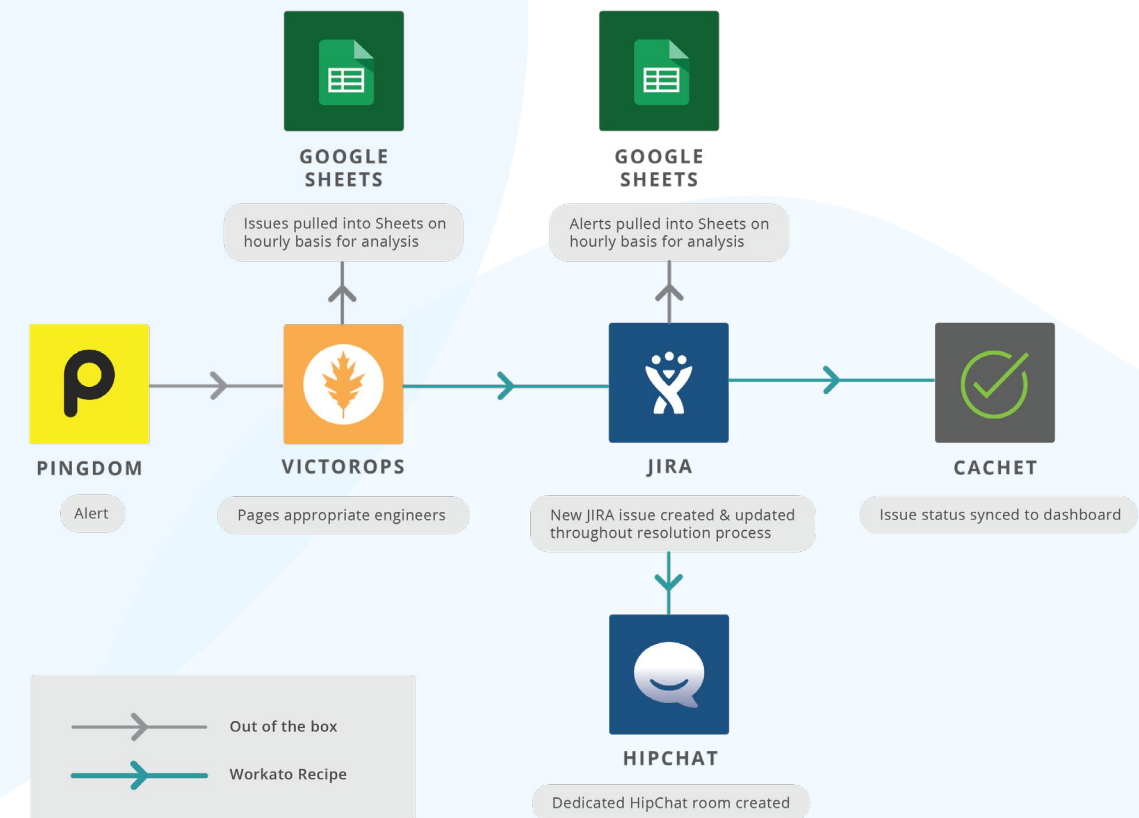
How the #1 eProcurement Software Company Uses Workato

“We’re developers and we can certainly write our own integrations, but what we really like about Workato is the ability of a recipe—the workflow is intuitive and it doesn’t require a deep expertise in coding or development. There are a lot of use cases and scenarios where we want to introduce bots or automation and using Workato will help us do it faster.”

Senior Development Director at Leading eProcurement Company

The #1 eProcurement company began using Workato in order to automate their Incident Management Workflows. They quickly expanded to use Workato for real-time analytics and Amazon Maintenance. In 8 months, they made 133 recipes with 27 employees acting as integrators.

MAKING INCIDENT MANAGEMENT MORE EFFICIENT



The company uses Workato to streamline communication and alerts for their engineers between VictorOps, JIRA, HipChat and Cachet. The workflow kicks off when their monitoring tool alerts VictorOps to an issue. VictorOps then pages the group of engineers responsible for acknowledging it.

Before using Workato, the next step was logging into JIRA and creating a JIRA incident ticket so they could track its progress as they worked on the issue. They also needed to enable communication between everyone involved with that specific issue by creating a dedicated HipChat room, where the on-call members could talk.

CONTINUED >

MAKING INCIDENT MANAGEMENT MORE EFFICIENT (CONT)

Throughout the entire process, JIRA’s incident management workflow had to remain accurate and up-to-date. As the issue progressed through JIRA’s workflow system (from Open, Investigating, and Identified to Fixed, Watching, and eventually Resolved), those updates also had to manually be changed in their Cachet status dashboard.

They wanted to make the process simpler and invisible to the engineer. Now, when an engineer acknowledges the issue in VictorOps, Workato automatically creates a new JIRA incident ticket. Workato also opens a new HipChat room for that incident and automatically invites everyone who is on-call into the HipChat room.

Once the engineers start working on the issue, a new set of Workato recipes keep JIRA and their status dashboard in Cachet in sync. The incident travels through 6 different JIRA statuses as it gets worked on: Open, Investigating, Identified, Watching, Fixed, Resolved. Workato watches the issue in JIRA and triggers when the status changes, updating it in Cachet. Workato facilitates communication of the alert status and helps the team stay on top of what’s happening.

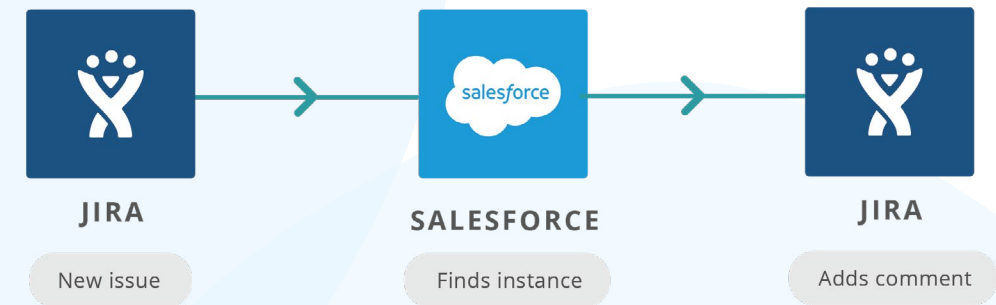
EASIER REPORTING AND INCREASED RELIABILITY

The enterprise also uses Workato to enable better DevOps analytics. On an hourly basis, a recipe pulls issues from JIRA into a Google Sheet for analysis; a similar recipe aggregates alerts from VictorOps. This way, the team can pick up on evolving incident patterns—without doing any manual data entry.

The company reports that they get more reliable use out of their apps without their engineers needing to be an expert in each one.

MAKING JIRA THE SYSTEM OF RECORD FOR ENGINEERS

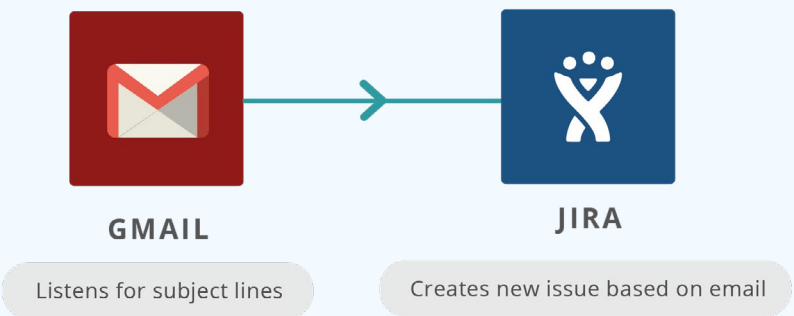
Since the Incident Management Workflow, the company has created several other workflows around JIRA and keeping JIRA the system of record. Most are around retrieving lists that are associated with an issue and intelligently placing them in JIRA.



For example, one recipe waits until there is a new issue in JIRA and then looks up the Instance (one of their custom objects) associated with the deployment name in Salesforce. Then Workato creates a new comment in JIRA with the information from Salesforce.

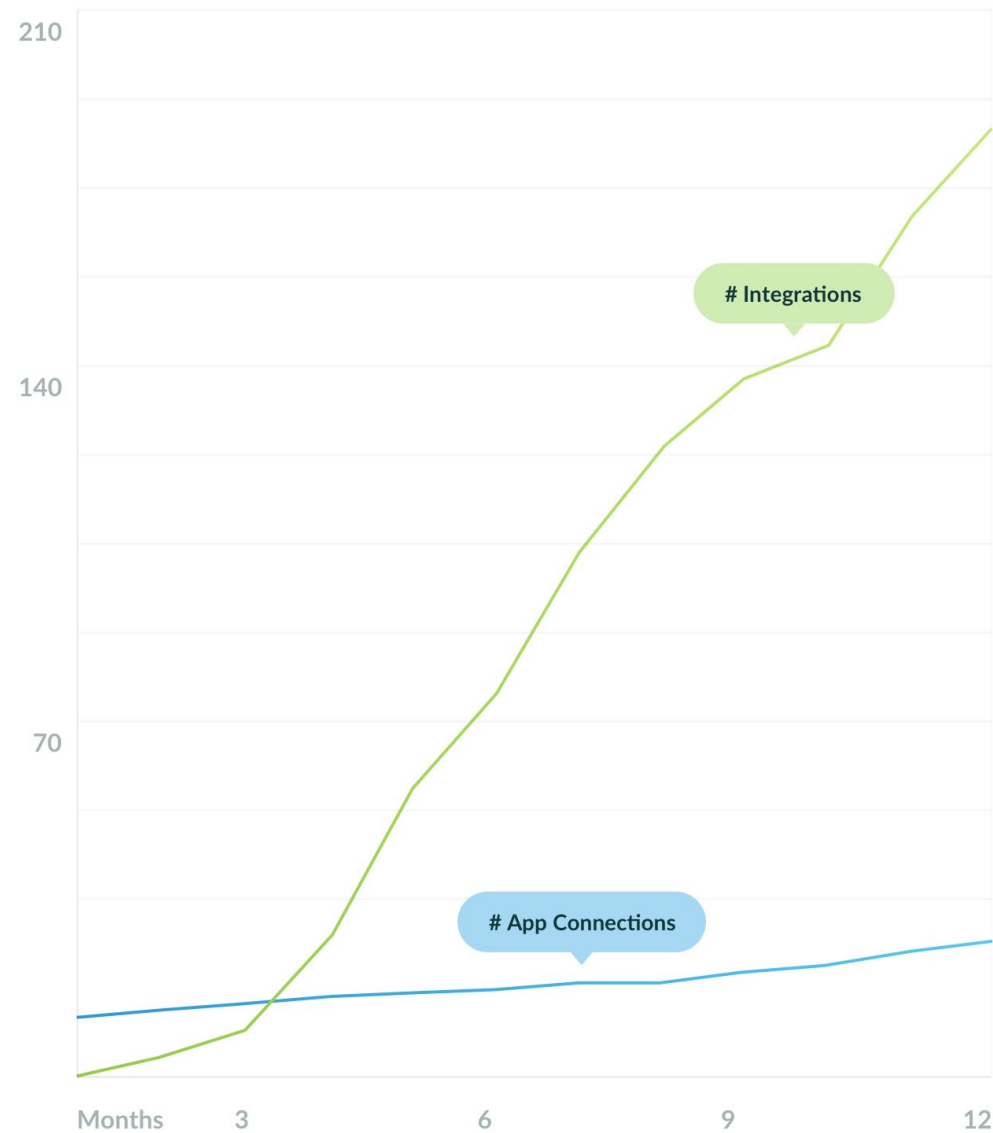
Another example uses Google Sheets for SRE Hourly Reports and moves it into JIRA.

AMAZON MAINTENANCE



The team set up Workato recipes to monitor an email account for specific subject lines. Some emails are from Amazon for maintenance and some are requests for certain things. Workato listens for the subject lines, and when one matches Workato will create a new JIRA issue with information from the email.

The #1 Cafe Chain



188 integrations.
5 integrators.
12 months.

Buyer

Biz Analysis and Process lead

Daily Active User Personas

2 Ad-hoc non tech, 3 Citizen

Use Cases

- Cloud: ServiceNow, JIRA, Workday
- On-Prem: MDM (Data)
- Digital Worker/Mobile: Smartphone ticket submission
- Things: Splunk alerts
- B2B: Support outsourcers

How the #1 Cafe Chain Uses Workato

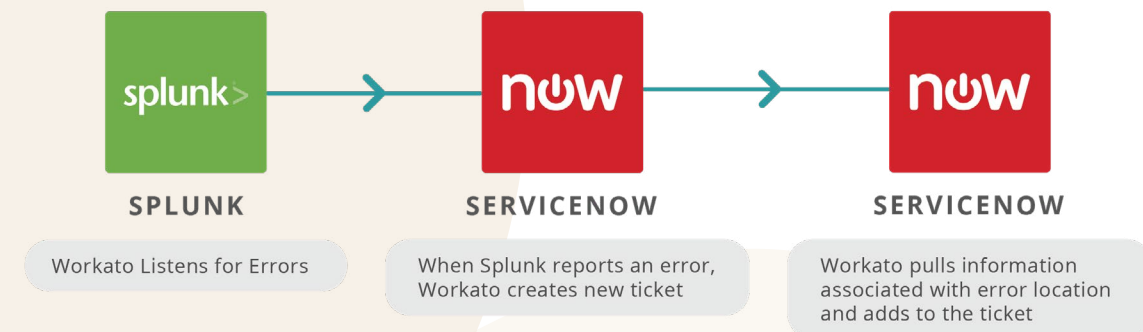
“We’re making an investment in the customer, enabled by technology and powered by operational excellence. The digital part is growing faster than the rest of our business. We want to make sure we are ready for it and continue to invest in that infrastructure.”

President at the #1 Cafe Chain

The #1 Cafe Chain uses Workato to create a better experience for both their customers and their cafe employees.

Their recipes around the IT management application ServiceNow enable preemptive support workflows, as well as streamline IT requests from franchises across the U.S. In the first 12 months of using Workato, the enterprise made 188 recipes with 5 employees acting as integrators.

ANTICIPATING ISSUES FOR TECHNOLOGY-BASED PRODUCTS



The leading cafe chain uses Workato to integrate Splunk and ServiceNow in order to pre-empt issues with the self-service iPads they have set up around the cafe. On these iPads, customers can order and pay without speaking with an associate. If an iPad crashes, Splunk will record the error. Workato can detect these errors before a human can, asking Splunk for any errors in real-time.

If an error is found, Workato automatically creates a support ticket in ServiceNow and pulls key information from Splunk including which location the crashed iPad is in (there are thousands of locations around North America) and which iPad crashed. Workato will also identify the contact information for the manager of the specific branch with the issue in ServiceNow and insert it into the ticket.

Workato provides the enterprise with an incredibly low-friction way to control issues across thousands of franchise locations. Monitoring the script manually would be costly, tedious, and less effective. This automation also allows the specific cafe to take the appropriate actions to fix the iPad without having a frustrated customer notify them that it's not working first.

ENABLING EMPLOYEES TO REPORT I.T. ISSUES VIA SMS



Now the employee can text a photo of the terminal that is broken to the support number straight from their smartphone; the text is received by Twilio. Workato monitors Twilio for new messages, then retrieves the SMS message from Twilio and creates a new ticket in ServiceNow, adding the image and the text. Workato also looks up the phone number that sent the SMS in ServiceNow, identifies the sender, and adds their name to the ticket.

These Workato automations allow Customer Success agents to see the screen of the terminal in the photo, giving them a better idea of what isn't working - something that wasn't possible over a phone call. It's great for employees too, as they can now simply text issues to a number--no logging into a computer, logging into ServiceNow, and then manually creating a ticket.

PARSING SUPPORT VOICEMAILS USING A.I.



In the event that someone does call for support and no one is able to answer, they should be able to leave a voicemail. However, voicemails are more difficult to automate than text based communication through SMS, email, or online portals.

The cafe chain wanted to create easy support access via all channels - text, online, and phone - so they still allow people to leave voicemails at the Help Desk. To make voicemails even easier to handle for the support team, the cafe chain sends voicemails from the staff at their 1900 locations to Dialogflow's NLP platform and creates new ServiceNow incidents with the transcript using Workato.

When a new voicemail comes into ServiceNow, Workato runs the voicemail through the A.I. powered service, Dialogflow. Dialogflow uses NLP to create a transcript of the voicemail. Workato then takes the text and adds it as a comment on the ServiceNow ticket.

This not only makes it easier for the support agent to deal with, but also helps keep very good records of all issues in ServiceNow for reporting.

Let's Start Your Digital Transformation Journey

This year 70% of Digital Transformation initiatives will not reach their stated goals.

Luckily, Workato has a clear roadmap to help your digital initiatives stay on track.



