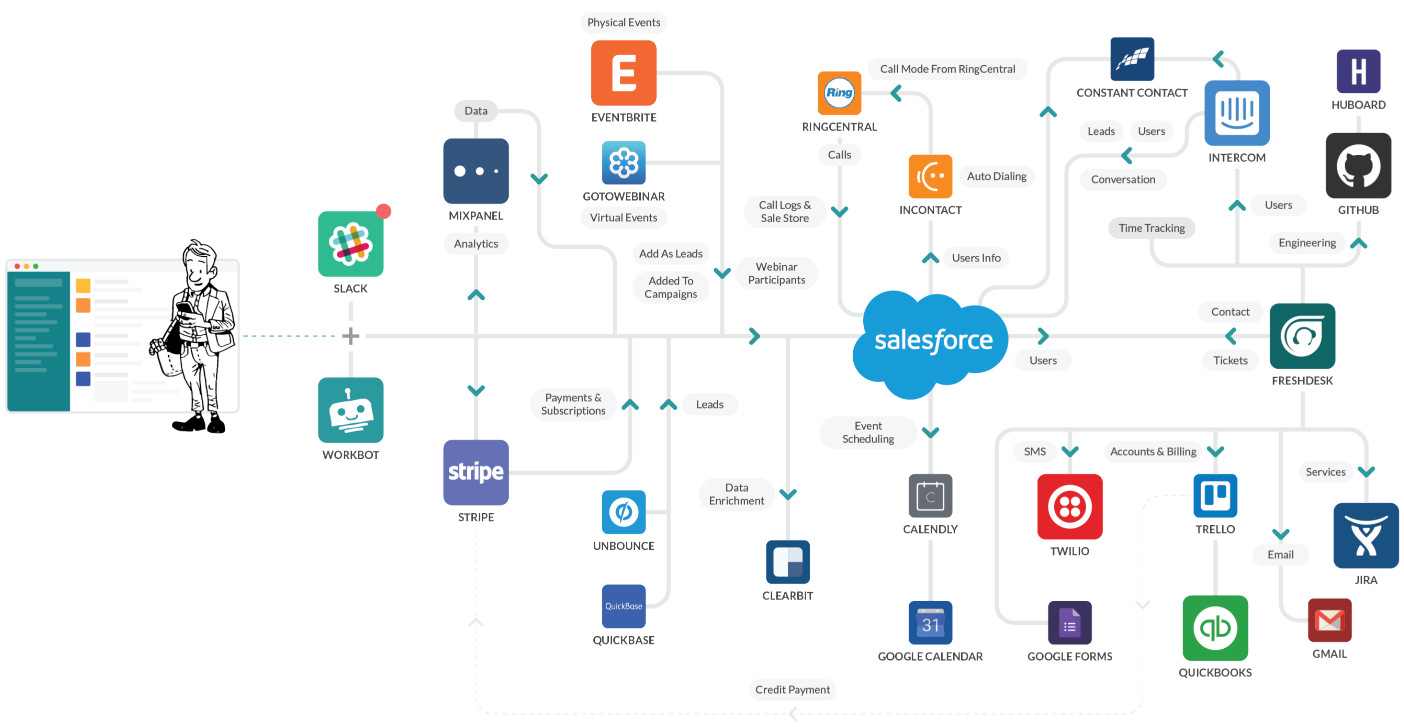
TRANSFORM YOUR BUSINESS

with THE POWER OF AUTOMATION

INSIDE WORKATO'S KITCHEN

HOW WE DID IT



workato

Contents

What's the Hold Up on Digital Transformation?

Digital transformation is more than a buzzword - it has become a top priority for many companies. It requires 4 key initiatives that are imperative to creating a sustainable, digital business:

- Staying on top of customer expectations around mobile and self-service
- Leveraging Cloud, Mobile, Artificial Intelligence and Automation platforms to become smarter and more efficient
- Innovating with products, revenues streams and delivery to stay ahead of competition
- Empowering employees with the most modern, connected, intuitive and responsive systems so they can be at their most productive and be better and smarter at serving their customers.

Going Digital

The first generation of digital businesses were digital natives such as Salesforce, Google, Netflix, Amazon, PayPal, Personal Capital and Metromile. The next generation are traditional companies that went through successful and massive transformation projects and were re-born digital. This is a rapidly growing movement that includes companies such as GE, Starbucks, Walgreens, Wal-Mart, Adobe, HBO, Clorox, T-Mobile, CBA, Telstra and PG&E. According to Gartner's 2016 CIO Survey, CIOs expect 77% of their business processes will be completely digital in next 5 years - up from around half that today.

Digital transformation is a complex ever-evolving journey, but what is actually required for a company trying to become digital? The core building blocks that power Digital Enterprise are:

- "Always-on," multi-channel customer experiences, same as consumer apps
- Empower lines of businesses and employees to do-it-themselves vs. depend on skilled technicians
- Platform or API driven ecosystems to drive innovations in product and in delivery models
- Real-time, 360 degree info on your customers across your apps for actionable insights
- Process Digitalization for pervasive integration of business services and processes
- Innovative business models - subscription, usage, freemium, marketplace, managed service
- Digital technologies & platforms that operate at consumer scale (beyond enterprise scale!)

Let's summarize this in one, very long sentence:

Digital transformation is ultimately centered around adopting best-of-breed apps and systems and enabling SMART, FAST, ADAPTABLE Integrations and Automations across all of your apps, APIs, data, people and devices to deliver innovative, personalized, multi-channel experiences and to do so in a fast, iterative, data driven manner to continuously evolve, innovate and stay ahead.

Digital Transformation Challenges

One of the biggest obstacles slowing down digital transformation is that the leading integration middleware platforms are not designed for this paradigm. They were created in a different era, pre-Digital and have evolved slowly and incrementally over a long time. A digital business demands that integrations and automation address an entirely new class of challenges. It is no longer enough for integration to be a "digital plumber," only connecting apps in the back end. Instead, integration needs to enable digital employees, empowering them to control their own integrations and make changes as the business grows. It is important to harness your cloud apps to help individual employees be at their productive best. Pervasive automation is essential to enabling a consumer scale of operations.

A modern integration platform must go beyond the traditional iPaaS approach and address the following requirements to truly become change agents for digital transformation:

- Must be both enterprise grade and operate at consumer scale
- Integrations and automations are not just built-to-last but also built-for-change
- Must empower specialists and IT as well as LOBs, citizen coders and digital employees
- Powerful yet 10X faster deployment and iteration of integration and automation projects
- Auto-Scalable, Always-on and Zero devops. Users should not have to deal with peak loads, provisioning, high availability, fault tolerance, versioning of recipes, system upgrades
- Always-on like a utility and a dramatically (10X) lower TCO

Hack your Digital Transformation with Automation

Whether you're the solo admin or a big development team, everyone needs their solutions to be as efficient, fast and flexible. The integration and automation across all your apps and systems is a huge element in doing this and in just a few years has gone from an "emerging need" to an "obvious need." Of course, automation comes with significant benefits such as a better engagement with your customers, faster sales cycle, better business insights, less manual work, reduced errors etc., but the urgency for solid integration and automation solutions most likely stems from the large change in how businesses are run in a global economy.

Today, when a business wants to be smarter or transform through technology they need platforms that are:

1 | Powerful - to automate the most complex processes

2 | Flexible - to support changing business needs

3 | Accessible - a.k.a. no code so employees are empowered with smarter automations and better

4 | Agile - so you can automate workflows in minutes to hours vs. weeks to months

Selecting The Right Platform

There are many integration tools on the market ranging from low power, do-it-yourself platforms to complicated, traditional software. None of the solutions that fall in these two categories can offer powerful, agile enterprise class integration with no coding. Workato falls in a category of its own - a category where users are empowered to control and craft powerful automation workflows that are easy to customize and change as the business changes with no code.

Workato was created from the ground up by a group of pioneers and world experts of integration, cloud, consumer scale and big data technologies. The goal was to completely rethink integration, making it at least 10 times more productive and easily accessible to all. Over 15,000 customer have adopted Workato, and a majority of them have done so in a self-service manner. We have made it super easy for anyone to consume these

Anyone can sign-up for Workato themselves, browse more than 150,000 community workflows or recipes and see if one fits their workflow. You can clone it and reuse the workflow, even with a heavily customized Salesforce account or other apps.

	Basic DIY Products	Legacy iPaaS	Workato
Consumerized Cloud Platform - Hands-free and Multi-tenanted	✔	✖	✔
Time to Integrate or Automate	Hours to days	Weeks to months	Hours to days
Required Skill Level	Low-tech	Specialists	Non-technical to Specialists
Number of Apps Supported	100s	< 50	100s
Type of Apps Supported	Cloud	Cloud On-premise	Cloud On-premise
Costs	$-$$	$$$$	$-$$$
App Integration	Low	Medium	High
Data Integration	Low	High	High
Ad-hoc process Automation	Low	Low	High
Empowers Digital Workers	✖	✖	✔ (Workbot)
API Management	✖	✖ / ✔	✔
Community Integrations	✖	✖	✔ (150,000+)
Zero DevOps	✔	✖	✔
People Workflows	✖	✖ / ✔	✔

Creating an integration from scratch is a snap. Workato's Chef UX, inspired by MIT's scratch project, is at least 10 times faster than the diagrammatic workflow design tools that are the di-rigeur and which we invented in the pioneering products we created at companies like Teknekron/Reuters, Tibco and Oracle.

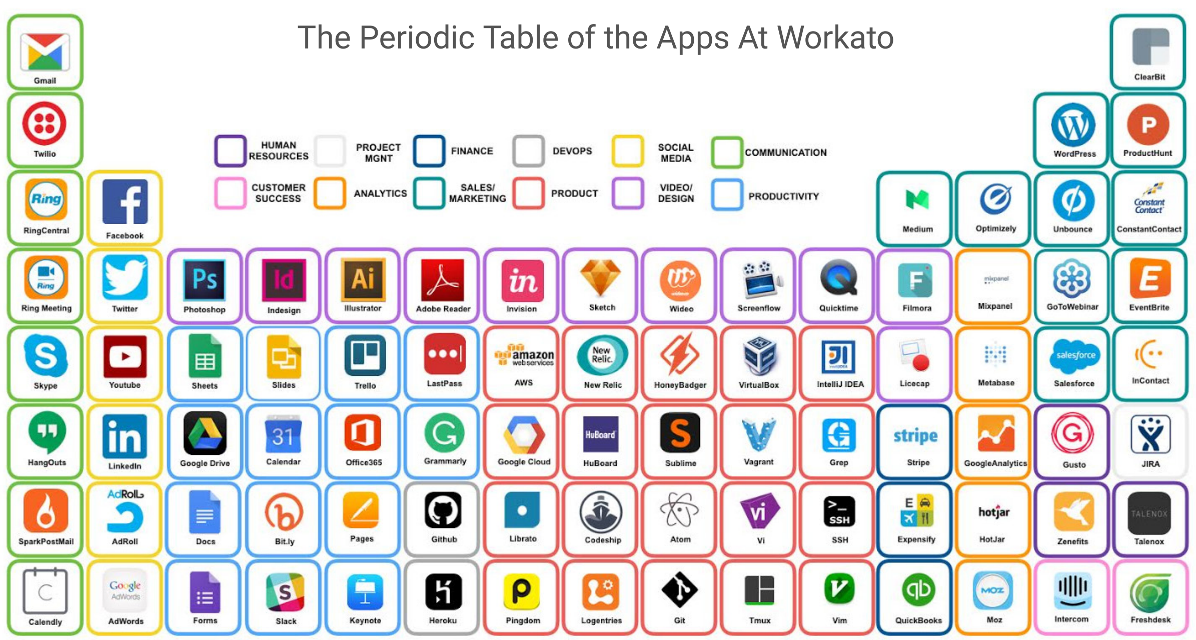
For fully non-technical users of integration, we deliver integrations in an app-like experience via "Workato Integration Apps." These apps can be embedded within your apps or services for even easier consumer access. Everyone in the company can chat with Workbot in Slack and other messaging apps to orchestrate their personal workflows, bring the most relevant, timely items from across their apps into Slack, give them all the context and analytics they need to understand the notifications and then let them take actions across these apps from one place. No hopping across 40 different tabs for different apps or logging in and out.

Inside Workato's Kitchen

Since we released our product on September 2014, we have been humbled by the support and reception we have received from so many customers. The Salesforce community, led by the MVPs, was among the first to embrace Workato and spread the word. Since then, we have experienced a rapid growth in customers, products, delivery models, partnerships with ISVs as well as with consultants. As you might imagine, it is a fast paced and dynamic environment with many distributed initiatives that come together at the top. In order to help our team understand, scale and support to serve rapidly growing customer base, we do two things:

1 | We use best-of-breed apps (lots of them!) that are awesome at what they do

2 | We use Workato to automate, measure and continuously improve our business flows across customer success, growth, marketing, devops, HR and back end operations.



While each of these apps are individually great and make perfect sense for the specific problem they solve, there are significant downsides and challenges. Customer information is fragmented and inconsistent from app to app, and processes like customer onboarding take place across a number of apps. It is critically important that you have a fast, productive automation platform that can be used by the same employees that are setting up or using these apps so they can harness the power of these apps. They need an automation platform to:

- Connect and automate app integrations and workflows that cut across multiple apps
- Give each employee a unified view of timely, relevant customer or other info across all apps
- Give them a unified context around these updates and enable them easily to take actions across these apps

At Workato we use over one hundred integration recipes that automate workflows across our apps while Workbot for Slack gives us a unified view of timely information and context across all these apps right in Slack. We are able to stay on top of all our apps and harness their full power with the automations enabled by the our own integration platform.

In total, as of September 2016, we make extensive use of over 90 apps (see the chart below) to run our business. We are hardly alone in our appetite for cloud apps. An average small business in the U.S. averages 14.3 apps[1] and an average enterprise uses 1154 apps[2]!

We invite you into our kitchen so you can learn from what we have done. If you use these or similar apps, you can even clone and use any of our production recipes yourselves. In fact, one of our customers, Box, has recently done just that to automate their entire partner onboarding process. Otherwise, there are over 150,000 public recipes on Workato created by our community, that you can pick and adapt for your purposes.

You can also read dozens of inspiring stories on how customers of all sizes, from SMBs to Fortune 500, are transforming their business using Workato at **Workato.com/blog.**

[1] Intermedia.net. (2014) *Death by 1000 Cloud Apps*. Retrieved from, https://www.intermedia.net/reports/1000cloudapps#.V_KBvPArKhd
[2] Skyhigh Networks. (2014) *Cloud Adoption and Risk Report*. Retrieved from, https://www.skyhighnetworks.com/cloud-report/

Customer Service Connectivity

The Information Silos Holding Your Customer Service Team Back

In a modern company, each department has their own best-of-breed cloud app that provides the best system for that particular job function. However, the reality is that no department can operate in a vacuum and the need to constantly share information with other branches of the business is not only unavoidable but also healthy. This is especially true for Customer Service, a branch that often acts as a triaging machine for all communication coming into the company. Customer Service Apps like Zendesk, FreshDesk, Intercom, ServiceNow and many more field customer inquiries, track issues, and allow the Customer Service team to assign the correct issues to the correct group of people at the company.

With all the information coming into the Customer Service App like customer inquiries, customer feedback, new partnership communication, and press outreach a strong ticketing system is needed to keep these issues organized. These ticketing apps optimize the Customer Service team's time but without sharing information between other apps like your CRM or Customer Message Platform, many issues arise.

Common Customer Service Problems

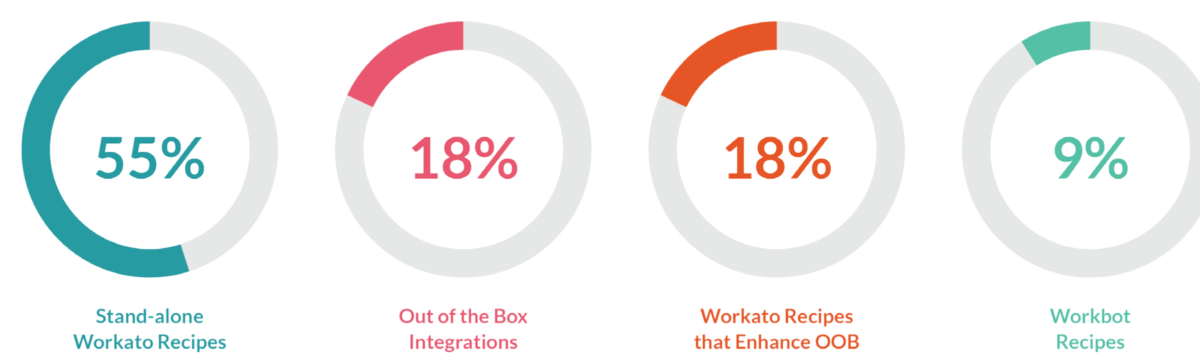
- Key information and tracking from one system is not viewable in another system.
- Only past support tickets from a customer are viewable, leaving the agent in the dark on other customer touchstones that occurred in other apps.
- Alerting members of other teams, like engineering, who operate in other applications is manual, error-prone, and breaks concentration.
- SMS messaging customers needs to be done on a phone then manually logged.
- The most relevant customer data can get lost as we track more an d more information about the customer.

Collaboration is key in providing the best customer service, but simply assigning tickets to other departments requires that department to context switch, leave their primary app to view the email alert, then log into the customer service app, only to go back to the primary app to take care of the issue. Every company needs to provide smart customer on boarding, an instant 360 degree view of the customer, and easy collaboration between departments.

The chart below shows the integrations Workato's Customer Service team is using on a daily basis:

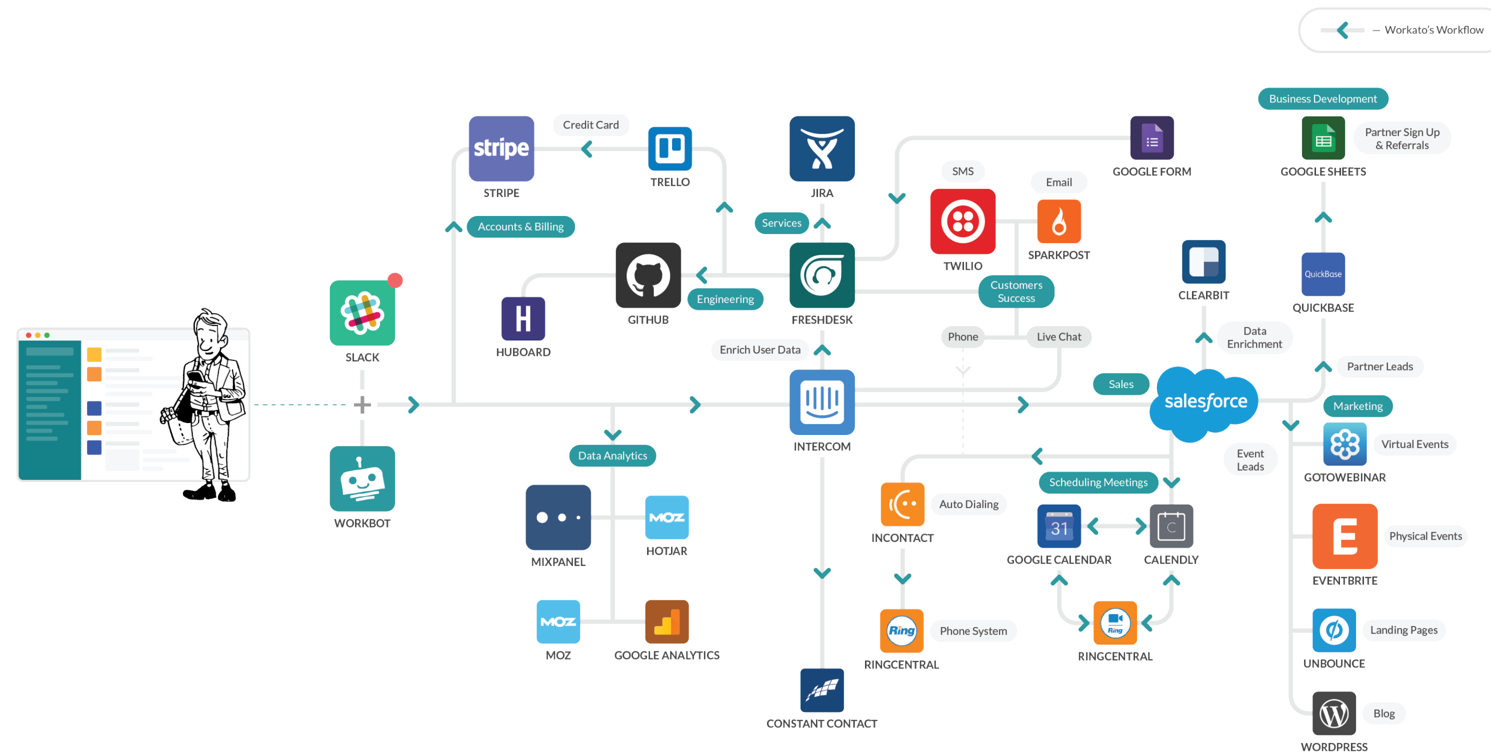
11 Total Integrations

9 Recipes



HOW **WORKATO** SOLVED THIS

CUSTOMER SERVICE

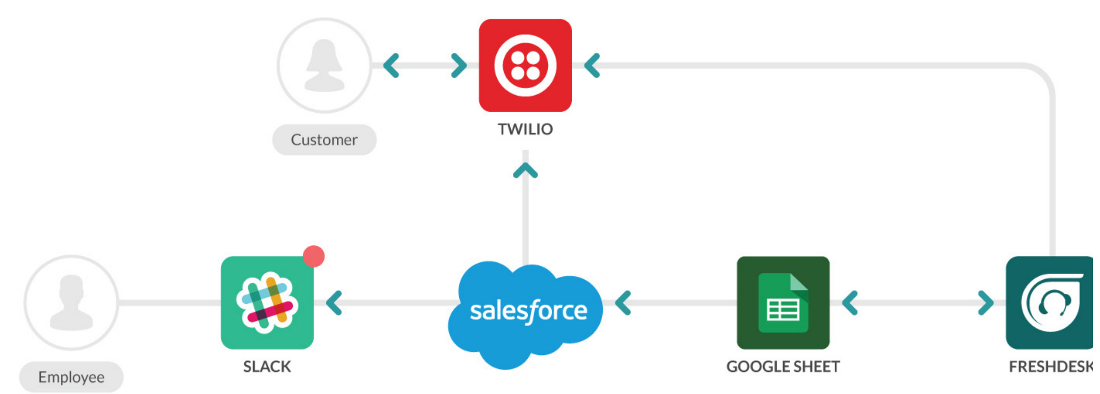


We use **10 different apps** in our Customer Service Stack to communicate with our customers by phone, email, and live chat as well as to effectively execute and track customer requests. We're hardly unique — Companies like Jumia, Box, ServiceNow and more are adopting best-of-breed cloud apps and using Workato to make them work together.

This chapter will cover the solutions we've created for the Workato Customer Success Team in the following categories:

Smart Customer & Partner On-Boarding

Customer On-boarding with Google Sheets, Twilio, FreshDesk, Salesforce, and Slack



At Workato, we want to engage our new customers immediately and do everything we can to make them successful on our platform. As part of this effort, we send out an SMS message to new users automatically using Twilio. If the customer responds and wants to learn more, the Customer Success (CS) team needs to triage the message and assign it to the relevant department (i.e Sales, Technical Support) and then respond to the SMS. When implementing this process, we began to run into some common issues - First, it is difficult to manage SMS requests without having an agent on call using a mobile phone at all times therefore, Twilio needed to be integrated with FreshDesk so all CS agents could access the SMS messages. Second, the SMS replies needed to be triaged by a CS agent so they know which group or agent the message should be assigned to depending on the contents of the message. Last, our agents needed the ability to connect the SMS replies with the corresponding FreshDesk Ticket and the corresponding customer profile so the messages could be tracked and the customer information is up to date in all systems.

In order to streamline SMS management, we created a Workato recipe to post SMS replies on Freshdesk and another recipe to allow Agents to reply via SMS message in the same Freshdesk Ticket eliminating the need for reps to manage a separate phone system. We created a Google Sheet to act as a database for SMS communication and track who sent what since there may be time in-between the initial outreach and when the customer replies.

The recipe for Inbound SMS messages creates or updates a FreshDesk Ticket when Twilio receives an SMS but it does a series of other steps to keep all systems in sync. When an SMS message is received via Twilio, the recipe (https://www.workato.com/recipes/140737) will:

- Search the Google Sheet for an existing entry of the person who replied, if it doesn't exist, create a new entry
- If the ID number of an existing FreshDesk ticket is not there, create a new ticket in Freshdesk and add the ID to Google Sheets
- If the Freshdesk ID number is present, add a note in FreshDesk, update the ticket
- Search for the Customer in Salesforce and Post in Slack that an SMS message has been received with the Salesforce ID for the customer and what the message said.

The recipe for Outbound SMS messages allows the agent to send replies straight from the Freshdesk ticket, taking care of all tracking needs by keeping the conversation linked to the customer's profile. https://www.workato.com/recipes/273601

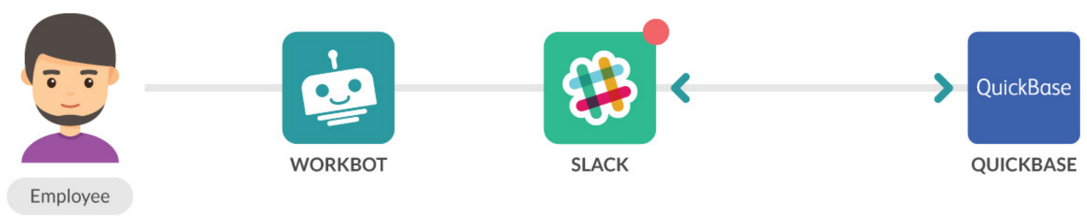
Making SMS text messages an easy option for both our leads and our customer success team by integrating Twilio and Freshdesk allows for more personalized interaction with customers. In fact, some customers prefer texting us instead of going to Workato.com to Live Chat or submitting a ticket on Freshdesk. The Customer Success team does not need to manage a separate app or be on a physical cell phone in order to reply to SMS messages from customers and they can quickly access the customer's Salesforce profile. With this Workato integration, the Customer Success team can simply reply to tickets and not worry about tracking or how it will get to the customer making their job more efficient and allowing for faster response times.

"The Workato automation enables us to be more efficient with our time so we can more effectively work with all of our partners. We can take care of all the admin work and focus on the important stuff like go-to market activities and partner enablement, which is better for us and our partners. It's been a huge success so far."

JULIEN BASSAN, BOX

Smart Customer & Partner On-Boarding

Partner On-Boarding with QuickBase and Slack



Workato has strategic partnerships with other companies such as Apple, Infusionsoft, Intacct and more to bring Integration capabilities to their customers. Our partnership with QuickBase includes special QuickBase plans for Workato that are priced by the number of user licenses the customer has in their QuickBase account. When on-boarding new customers who are on a QuickBase plan, we need to see how many user licenses the customers has. QuickBase allows us to access that information and see some details of their QuickBase subscription in order to verify that the information the user has given is accurate.

As our partnership unfolded, we realized there was no easy or quick way to view a customer's user licenses in QuickBase and it was a pain to manually log into yet another app just to check on licenses. Because QuickBase was giving us limited access to a preexisting system, integration was the best way to make this information readily available for our team. We decided to go a step further by making the information accessible straight from Slack.

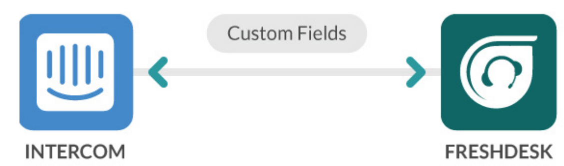
We created a Workbot for Slack recipe that allows any Workato employee to enter the email address of the customer in Slack. Workbot queries the email in a shared Quickbase app and returns the plan and user license numbers to the requester right to Slack.

https://www.workato.com/recipes/323387

Making the Quickbase customer's plan information readily available in Slack allows the Account Management team to verify information given by users quickly and resolve customer requests in a much faster time frame.

360° Customer Data For Optimal Support Experience

Syncing FreshDesk and Intercom for a Full View of the Customer



User information from the Workato platform is sent to Intercom which acts like our User Data Storage System and is also used to communicate with customers. Workato Support handles incoming tickets/emails via FreshDesk. FreshDesk Contacts have a 1-1 relationship with Salesforce Leads / Contact.

Without these systems working together, all of our customer information is in Intercom and not viewable in FreshDesk or in the customer Tickets. That means whenever a FreshDesk ticket is created, Customer Success Agents have to go into Intercom to check account details manually, then go back to FreshDesk to solve the problem and communicate with the customer.

We need the customer account information to show inside of the ticket so the agent can view customer data from Intercom in FreshDesk which means we need to sync custom fields. Unfortunately, there is no out of the box way to integrate custom fields in Intercom and FreshDesk, as existing integrations between FreshDesk and Intercom are extremely weak or non-existent.

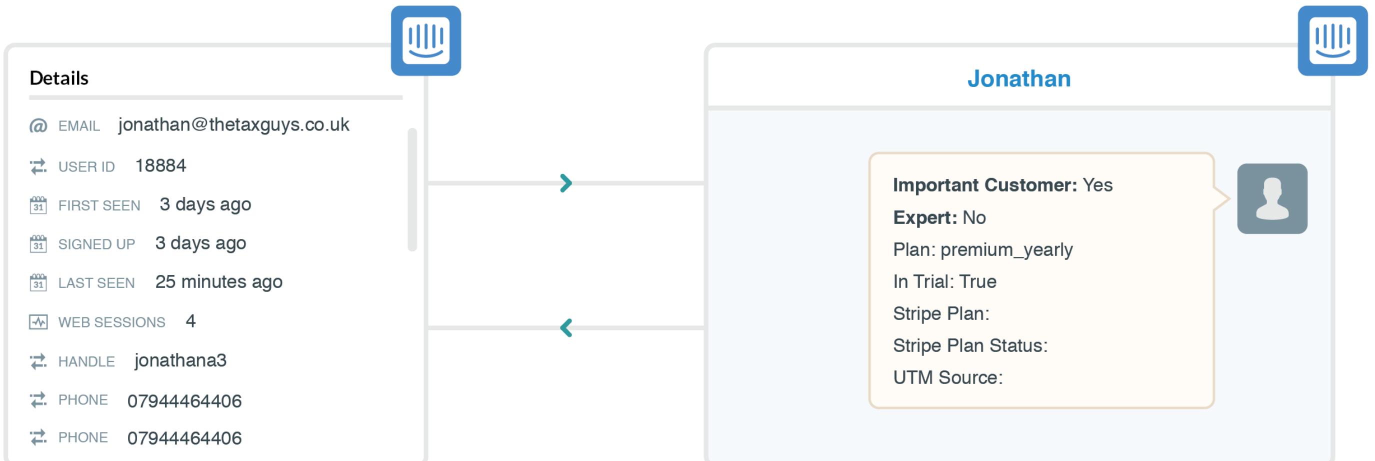
To solve this problem and get our customer data into the correct Freshdesk ticket, we created custom fields in the Ticket and a Contact in Freshdesk to store information about the customer. Our Workato recipe triggers whenever a Freshdesk ticket is updated. It then pulls the relevant information from Intercom and populates the Freshdesk Ticket.

Freshdesk Tickets:
https://www.workato.com/recipes/248704
Freshdesk Contact:
https://www.workato.com/recipes/248694

This is huge for our CS team and saves each Customer Success Agent at least 5 minutes per ticket as they no longer have to switch back and forth between Intercom and Freshdesk. This saves the team around 60 hours per month and saves the company about $2,400 a month in labor costs. This integration also allows for better routing of users to different team members so that users on different Workato Plans with different service tiers receive the correct support.

360° Customer Data For Optimal Support Experience

Enhancing Intercom to Show the Information Our Agents Need



There are different tiers of Workato plans that provide different levels of support. Although live chat is available to all users, first line Customer Success agents must discern where to route the request. If the user is on a high-support plan they need an immediate answer on chat, whereas a low-support plan may require the request to be sent to our ticketing portal if the question can't be immediate dealt with.

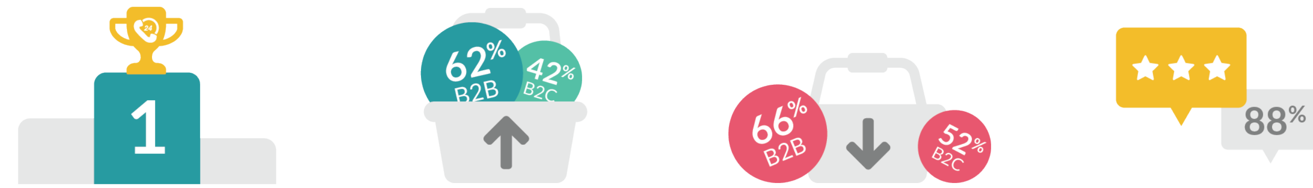
With the 150+ attributes in Intercom, it is time consuming and confusing for the agent to scroll through all of them in order to find key pieces of customer data required to make this decision. Unfortunately, there is no quick way for agents to see key customer details like plan and trial status in the conversation itself.

To optimize our CS agent's time in Intercom, we created a recipe that triggers when a conversation is created in Intercom. The recipe searches in Intercom for user data like what plan the user is on and creates a note in the conversation itself to display key customer data to the agent replying.

https://www.workato.com/recipes/330148

By moving the relevant user data to the forefront of Intercom chat, the Customer Success agents can give appropriate responses to customers on live chat based on their support tiers and view key customer information easily.

Customer Service - Both Good and Bad - Impacts Revenue



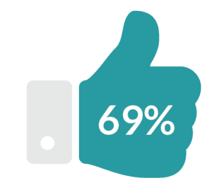
Participants ranked customer service as the #1 factor impacting vendor trust

62% of B2B and 42% of B2C customers purchased more after a good customer service experience

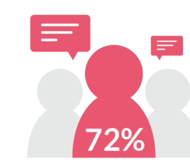
66% of B2B and 52% of B2C customers stopped buying after a bad customer service interaction

88% have been influenced by an online customer service review when making a buying decision

Fast Customer Service Matters



69% attributed their good customer service experience to quick resolution of their problem



72% blamed their bad customer service interaction on having to explain their problem to multiple people

Customer Service Experiences Have A Long Lasting Impact

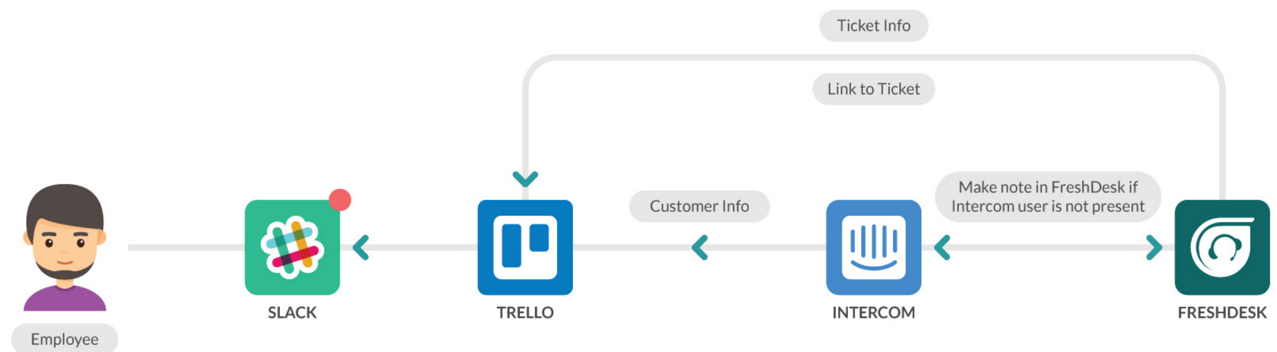
24% continue to seek out vendors two or more years after a good experience

39% continue to avoid vendors two or more years after a bad experience

Women, B2B, Gen X and high income households (H.I.H) are most likely to avoid vendors two or more years after a bad customer service experience

Product Trial, Upsell & Renewal Optimization

Streamlining the Process to Make Account Changes with FreshDesk, Trello, and More



At Workato, Freshdesk is the ticketing system that customers use to submit support tickets however, Trello is used by the accounts management team to track account-related tasks and their statuses. For example, when a customer wants to upgrade their account or needs a refund, a new Trello card marks this task. We needed a way to notify the accounts team of account-related tickets raised by users without having Customer Success agents notifying them manually and individually. After the issue has been processed, the Account Management Team also needs to respond to the ticket in Freshdesk to inform the customer about the changes, or if they have any clarification. As the company grew and we acquired more customers, we realized there was no way to notify the account team of any accounts-related requests by customers promptly and automatically. There was also no easy, out of the box integration between Freshdesk Tickets and Trello.

To solve this pain point, we created some custom fields and Workato recipes to make account changes seamless. First, the Customer Success agent triages FreshDesk tickets and if the ticket is accounts-related, they select a "Send to Trello" (Custom Ticket Field in Freshdesk) option with key instructions (Custom Ticket field in Freshdesk) for the accounts management team. A recipe picks up the ticket information and creates a Trello card with a standard template for the accounts management team. The card contains key information from Intercom and Freshdesk, like the key instructions from the Customer Success agent. After the card is created, a notification is created in the accounts management Slack channel to notify them of the new task.

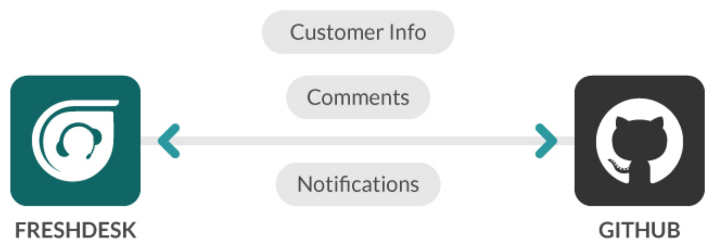
The Trello card created by the ticket will automatically contain key information about the user so that the account management team does not need to hunt for the relevant data required to process the changes. Additionally, there are direct links from the Trello Card to the Freshdesk ticket.

https://www.workato.com/recipes/247761

The result is a much clearer handover process from Customer Success to Accounts Management teams, with about 20 minutes saved per accounts-related request. This is a huge productivity boost. Since Trello cards and notifications are automatically created with relevant information, Accounts Management agents can immediately handle the requests without having to refer to different apps for information. This leaves Workato free to continue growing in size as the entire process is automated.

Support & Engineering Synchronization

Requesting Product Enhancements from Development with FreshDesk and Github



When a customer reports a bug or submits an enhancement request through our support portal, an issue has to be raised to the development team for them to build out the enhancement or fix the issue. The Development team tracks issues and requests through Github while FreshDesk is used as the main customer facing ticketing system.

Without integration, there is simply no easy way to create a Github Issue without leaving FreshDesk and logging into Github, which slows the CS team down.

As a quick fix, we set up a pre-built integration between FreshDesk and Github. Inside FreshDesk, Agents can create an issue in Github with a click of a button to send the information to the Engineering/Product team. The Github issue then gets assigned to a development team member, who uses the FreshDesk Ticket to communicate directly with the customer.

However, this pre-built solution does not allow us to:

- See customer information in Github
  The plan details of the customer and priority status of important customers do not go through using the pre-built integration.

- Selectively send comments from FreshDesk to Github

- Send Notifications
  Whenever someone is assigned to the issue on Github, FreshDesk does not get a notification of the assignment, and there are no notifications sent to the ticket owner.

- Have comments from Github reopen FreshDesk tickets
  When the development team has questions for the user who reported the issue, the ticket does not get reopened and the Customer Success team does not know about the request.

- Control for duplicates before creating Github issues

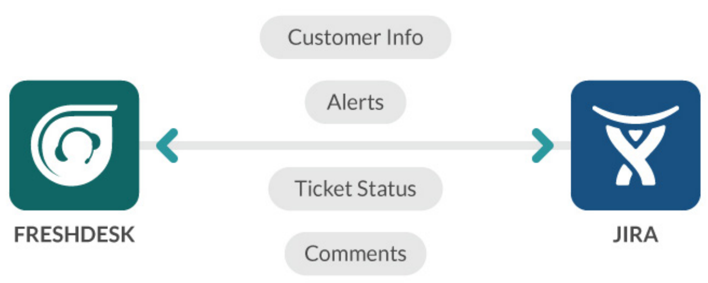
"Keeping the engineering team on top of important customer issues helps us be more responsive to customer needs and allows the customer service team to deliver the great experience our customers deserve."

HARISH SHETTY
VP ENGINEERING
WORKATO

Workato can support all of the scenarios above and a Workato recipe that will take care of these pain points is in the works. This recipe will work hand in hand with the pre-built integration. We are never against using pre-built or out of the box integrations for the cloud apps we use everyday, rather we are enhancing them to fully fit our requirements! Making Github and FreshDesk communicate helps facilitate better communication between the development team and Customer Success team, as well as helping customers get results faster.

Support & Engineering Synchronization

Managing Requests for Services with FreshDesk and JIRA



Workato offers services such as professional services or the free 1 hour quick-start calls where a customer can work with a Workato expert to build recipes and design automations. When a customer requests services, the request comes in through FreshDesk and the Customer Success team has to inform the services team. The services team uses JIRA to manage requests and so we needed a comprehensive way to sync up FreshDesk and JIRA.

To try and make it easy for customer success reps to alert the services team of a new request, we used a pre-built integration between Freshdesk and JIRA. Inside FreshDesk, Agents can simply create an issue in JIRA with a click of a button. The JIRA issue get assigned to a Services Personnel, who uses the Freshdesk Ticket to communicate with the customer. Unfortunately, this we soon found that this pre-built integration isn't completely comprehensive.

This pre-built solution does not allow us to:

- See customer information in JIRA
  Important customer details like the plan and priority status the customer does not move from FreshDesk to JIRA using the prebuilt integrations.

- Provide Alerts
  Whenever someone is assigned to the issue on JIRA, no notification of assignment is sent to FreshDesk and there are no notifications sent to the ticket owner.

- Automatically Change the Ticket Status
  When the assigned agent in JIRA has a question for the customer, a private note is added in FreshDesk, but we are unable to automatically change the ticket status so that the agent can immediately know that he needs to take action.

- Selectively send comments from FreshDesk to JIRA

- Selectively send comments from JIRA to FreshDesk

- Control for duplicates before creating the JIRA issue

Workato can support all of the scenarios above and a Workato recipe that will take care of these pain points is in the works. This recipe will work hand in hand with the pre-built integration. We are never against using pre-built or out of the box integrations for the cloud apps we use everyday, rather we are enhancing them to fully fit our requirements! Connecting FreshDesk and Jira will allow for better communication between the Services Team and Customer Success Team, leading to a faster response time to customer requests. Plus, all communication between the Services team is tracked in FreshDesk automatically.

"Workato's integration with Jira, Zendesk, and Slack has had a significant positive impact for my support team. Everyday, in the day to day work of the agent, they really notice the difference. They can concentrate on the problems that are reported and they don't have to remind themselves to send notifications to this team or that team. We consistently have an above 95% Customer Satisfaction Rating and Workato has allowed us to concentrate on providing the best support to keep that approval rating high."

CARLOS SANTOS
TEAM LEADER, LAUNCHES & SUPPORT
JUMIA

Marketing Segmentation Made Easy

Getting Email Lists and Leads Exactly Where you Want

Marketing can be done digitally or face to face, but if you are a digital-ready business, those leads will need to make their way into your CRM, Email Marketing App, or Collaboration tool either way. With so many channels bringing in leads that then need to be triaged and prioritized, it can be difficult to get all of the important information into the right places.

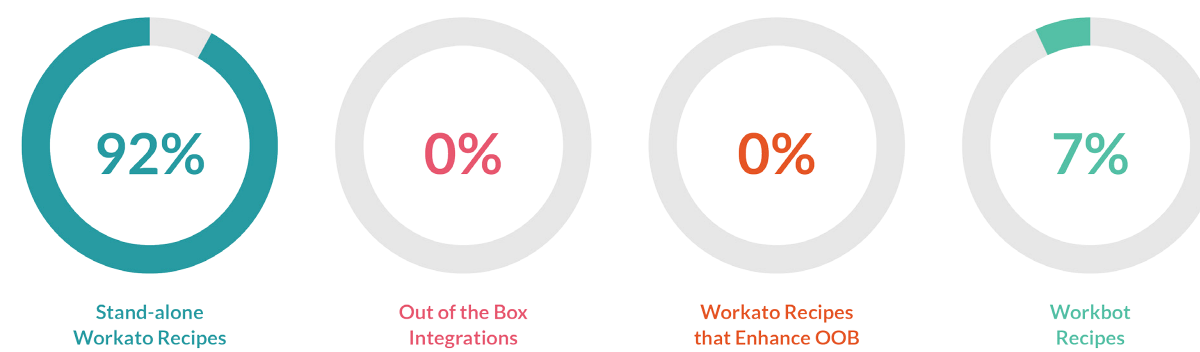
Common Marketing Problems

- A fragmented view of a customer because all customer touchpoint are not recorded in one place
- Not enough information going from one app to the other to make informed prioritization decisions on new leads
- No easy way to segment leads for behavior-driven lead and nurture
- Manual export and imports from your website to email marketing app to keep email lists up to date

Our marketing team uses some key recipes to put all the data they need in exactly the right spot. From making sure all the leads from various landing pages and events go into Salesforce duplicate free for our Sales Team to follow up on, to keeping our Email marketing lists up to date and ready to go, our marketing team would waste precious time if all of these key applications didn't work together via the power of automation.

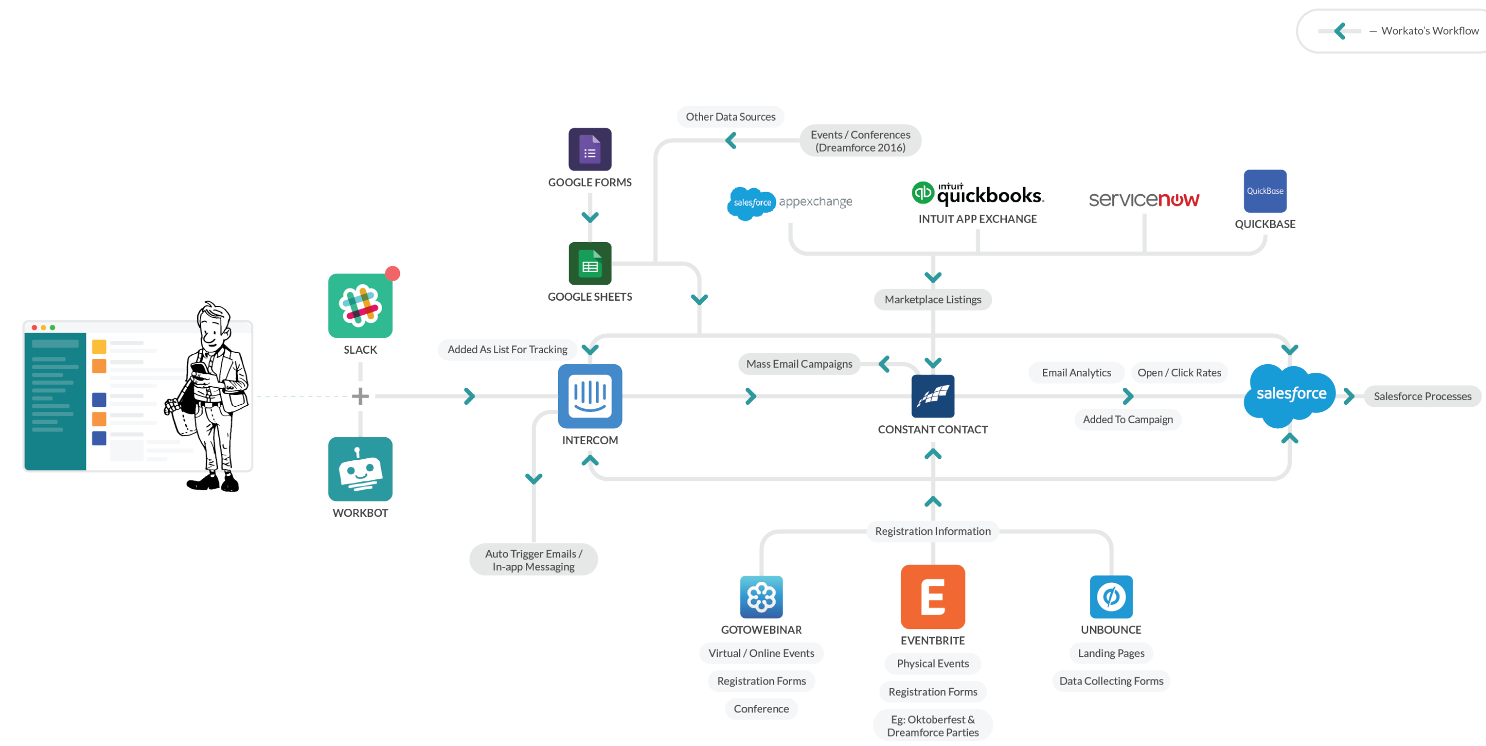
14 Total Integrations

14 Recipes



HOW **WORKATO** SOLVED THIS

MARKETING

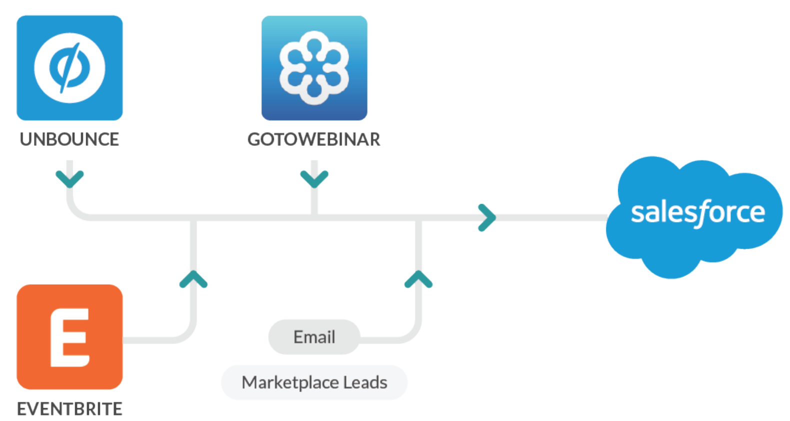


We use **11 apps in our Marketing department** to generate leads, intelligently follow up, and communicate with our customers. Why so many apps? Many businesses and non-profits like H2O.ai, Minnesota Fringe Festival, WavHello, and more use separate services in tandem with Workato to execute highly segmented and targeted marketing efforts.

This chapter will cover the solutions we've created for the Workato Marketing Team in the following categories:

360° Customer Touchpoint Intelligence

Syncing All Marketing Leads into Salesforce



The marketing team at Workato uses several sources to generate leads. For example, we use Unbounce to quickly and easily create marketing landing pages without the help of IT. The Marketing team typically uses a form on the Unbounce page to collect leads who want to know more about a particular offer or promotion. We also use Eventbrite for physical events, GoToWebinar for webinars, Google Sheets for Conferences, and have several marketplace listings. In order to provide all teams with a 360° view of our marketing leads allowing for prioritization and triage, we need to move all of our leads into Salesforce where our Sales team will take over to follow up with qualified leads.

Because the source data comes from various apps and in various forms, we needed the ability and flexibility to pull data from multiple sources. i.e. not just one integration end point, but many. Unfortunately, Pre-built Salesforce integrations did not allow us to define custom duplication logic or filter spam. Existing integrations also did not have the ability to add new relevant leads/contacts into a specific Salesforce campaign. To solve these issues, we created Workato recipes that solved these problems, letting us define our own duplication logic and filter spam, as well as add leads to a specific Salesforce campaign.

Unbounce to Salesforce
Leads who submit contact information via our Unbounce pages or other sources used for lead gen might already exist in Salesforce, so we use a recipe to cross-reference their emails, names and company names to prevent duplicates. These leads are then added into Salesforce campaigns to easily track the progress and success rates of the marketing campaigns. Some important leads, like enterprise level leads, are posted to a Slack channels so that the sales team can take action and contact these leads as soon as possible.

For example, we have a webpage where users can sign up to download the Forrester Report:

https://www.workato.com/recipes/272308

Hybrid cloud/Enterprise plan leads are taken care of in this recipe:

https://www.workato.com/recipes/193774

Eventbrite to Salesforce
When we have physical events, like our Oktoberfest party at Dreamforce, we use Eventbrite for registration and a recipe to intelligently move leads to Salesforce: https://www.workato.com/recipes/330972

GoToWebinar to Salesforce
GoToWebinar is used for running webinars and this recipe brings the leads into Salesforce.
https://www.workato.com/recipes/306830

Marketplace Listing Sign Ups to Salesforce
We have several Marketplace Listings on other apps' marketplaces. When someone is interested, we receive an email and need to move that lead information into Salesforce. Data from Marketplace listings come in various formats:

Marketo Launchpoint:
https://www.workato.com/recipes/219316

Intacct Marketplace:
https://www.workato.com/recipes/223338

Automatically moving leads to Salesforce without duplicates or manual data saves both the marketing and sales teams lots of time. It takes a marketing team member about 15 minutes to completely check for duplicates in Salesforce and create the lead record for each lead that comes through Unbounce pages, so about 4 hours of manual work is saved through these recipes for each page.

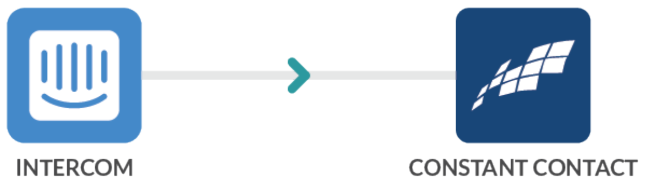
We also get a faster turnaround time when it comes to following up with customers since all the information the Sales team needs is ready to go. They can go down the list, automatically dialing to follow up with all customers knowing that the leads are there. The automatic movement of these leads also prevents data entry errors and duplication.

"Without IT support, I needed a platform that allowed me to do marketing automation. Workato was like a gift from God. If I didn't find it, I would have had to go way over budget to hire someone to do the integration."

TARA HUMPHRIES
HEAD OF DIGITAL MARKETING
WAVHELLO

Real Time Email Marketing Lists

Keeping Intercom and Constant Contact in Sync



Initially, all in-app and email outreach came from Intercom because you can easily segment specific groups of people based on their behavior on the website. When we began creating a monthly newsletter, we thought we could send that over Intercom as well, but soon realized it wasn't nuanced enough to handle more frequent email marketing. A major issue with using Intercom for general email marketing was the fact that when a user unsubscribes from a marketing email that was sent via Intercom, that user is unsubscribed from all future emails sent via Intercom. This isn't good news as we use Intercom to communicate important account information or more targeted campaigns.

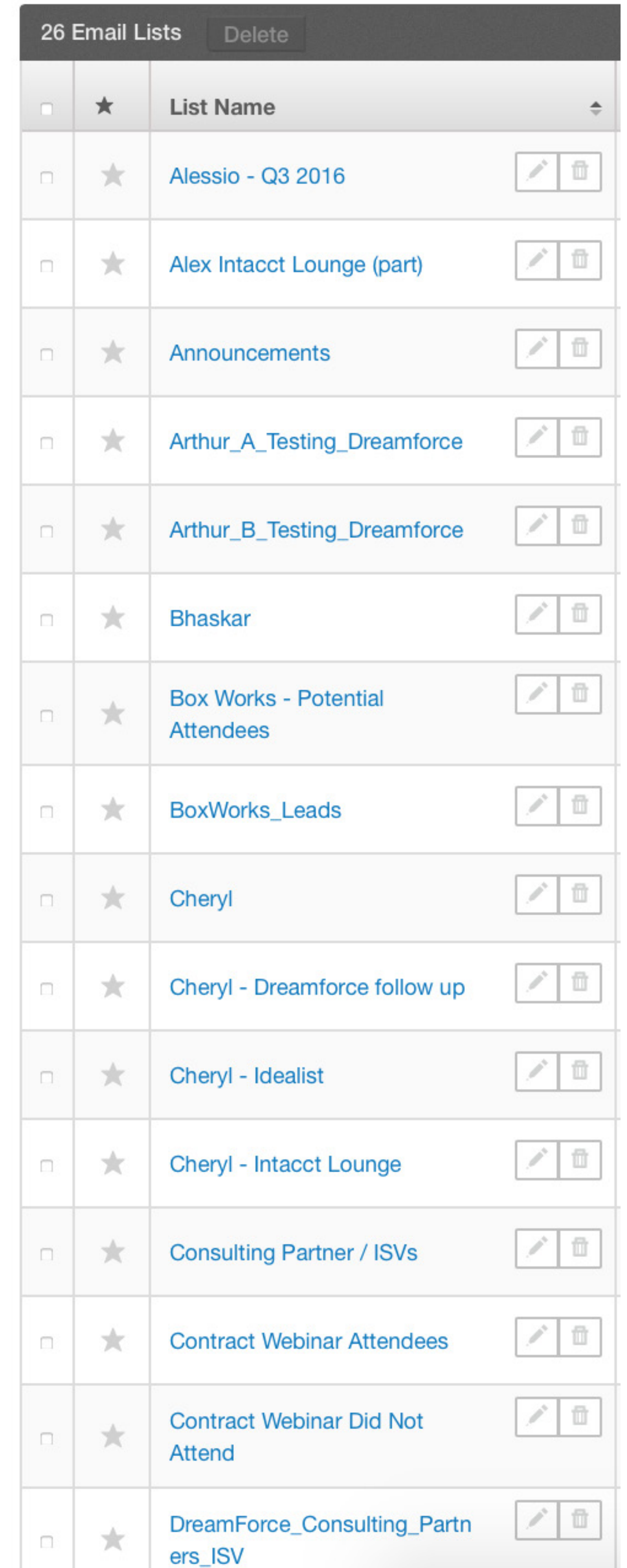
By using Constant Contact for promotions, we can send targeted newsletters to our users without worrying that they will miss important account information even if they don't want marketing emails. This helps to reduce unsubscribe rates and ensures that new content will reach users who want to see it. Our Content Manager maintains two main lists for email marketing to the entire database - one for the monthly newsletter and one for general announcements. By having two lists, anyone who doesn't want to receive the newsletter but still wants to get announcements or vice versus can unsubscribe from one instead of being forced to choose between all or nothing.

Intercom is automatically up to date with all the new sign ups coming into Workato, however to keep the two lists in Constant Contact up to date we needed to move new sign ups to Constant Contact automatically. There was no existing way to sync user information from Intercom to Constant Contact with conditions. Conditions are necessary as we do not want to sync internal users, partners, etc. to our mailing lists to reduce spam.

To make our email lists ready to go in real time, we created a recipe that polls for users in a certain segment that we defined in Intercom. This recipe checks Constant Contact to see if the user is already there before creating the user with their contact information from Intercom.

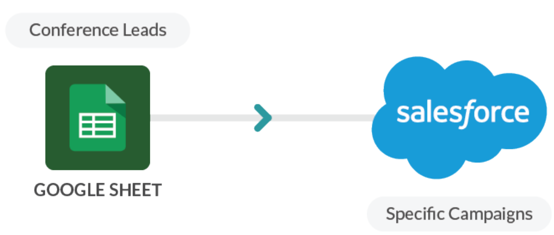
https://www.workato.com/recipes/282449

This automation ensures that when our marketing team needs to send an email, the email lists are updated and ready to go in Constant Contact automatically. There are no duplicates, internal users, or partners on the list who should not receive promotions. This saves around 30 minutes per email for the employee creating the email communication as they do not have to manually export a CSV file from Intercom, upload to Constant Contact, and check for duplicates. It also leads to a lower unsubscribe rate because our customers have greater control over what email communications they receive.



Behavior-Driven Lead & Nurture

Moving Conference Leads from Google Sheets into Specific Salesforce Campaigns Without Duplicates



When we attend events or conferences, such as BoxWorks or Dreamforce, we collect data on potential users who would like to try our platform. This data will then need to be cleaned up and uploaded into Salesforce so that our sales team can follow up with these leads and provide them with more information on our platform. These data sets are usually stored on Excel or Google Sheets, possibly by extracting from the organizer's database or from scanning namecards from the event. They also have to be tagged to specific campaigns in Salesforce so we can provide targeted follow up and track their effectiveness and conversion rates. Of course, existing customers or leads often visit conference booths, so we also needed to check if they already exist or are duplicates before adding them in Salesforce.

Because these are one-off situations and not a regular occurrence, we needed a way to quickly set up a recipe each time we need to move conference leads into Salesforce. To do this, we use a callable recipe. Callable recipes are snippets of integration logic or a section of a workflow that you have already built out and can save to use in any recipes with the click of a button. One callable recipe contains the logic to check for duplicates by searching for the email addresses, names and company names of each lead. If the lead is found, it returns the existing lead's Salesforce data so that it can be further updated if required. Otherwise, the recipe creates a barebones lead record. This standardizes the deduplication process, checking for all uploads. We can then start with this callable recipe and quickly customize it for the specific conference.

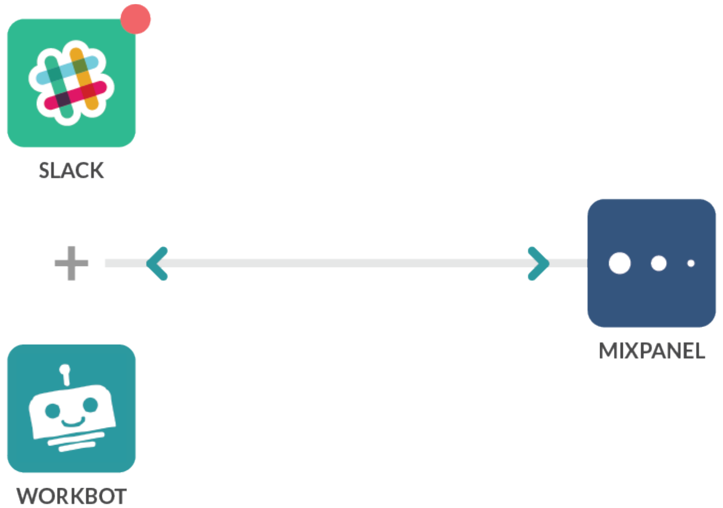
We use Google Sheets to store the data set. The recipe then feeds data into the callable recipe and writes additional details into the lead records if needed.

https://www.workato.com/recipes/308760

On average, we gather about 150 to 300 leads per event, which have to be checked and uploaded. Considering a lead takes about 2 minutes to check for duplicates and 3 minutes to create a record with minimal data, this process saves us at least 12.5 man-hours of manual data entry work. The standardized deduplication check and creation process also ensures that most scenarios will be covered and eliminates human interaction and data entry errors.

Behavior-Driven Lead & Nurture

Bringing MixPanel Stats into Slack



Mixpanel is used to analyze user activity on our website. Funnels were created in Mixpanel to show different steps in the user's experience of Workato. For example, if we wanted to know how many users dropped off before they got to their first successful Workato integration job, a Mixpanel funnel can be created to show the different stages to success like creating connections, testing and successfully running jobs.

Requests for funnel data are also ad-hoc and are usually shared in a team. This helps with making marketing decisions like creating new campaigns, etc. But, in order to share Mixpanel information during discussions, a user would have to log into Mixpanel, access the funnel, screenshot it and share in a shared Slack channel for the team to view. Because some of our marketing team is remote, it's not as simple as pulling it up on a person's screen and all looking at it. Instead the employee must leave Slack, log into Mixpanel, take a screenshot and upload it to Slack. This is tedious and inefficient.

To address this problem, we created a Workbot for Slack recipe that triggers when a user requests to see a funnel in Slack. The recipe then prompts the user to specify the funnel, queries Mixpanel for the data in that funnel and creates a column chart with the data right in Slack.

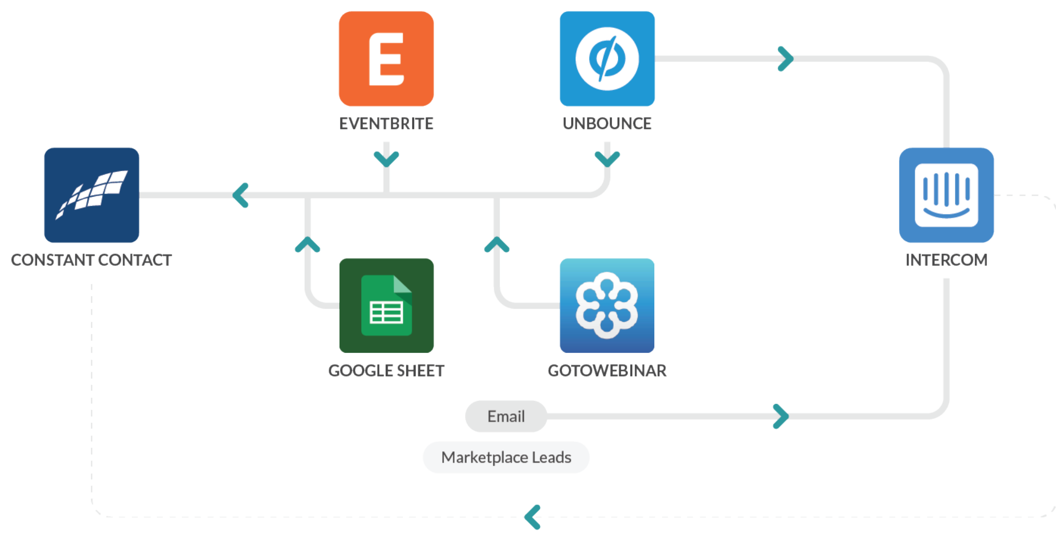
Show details for one funnel:
https://www.workato.com/recipes/140740

List all funnels in Mixpanel:
https://www.workato.com/recipes/140644

Since Workbot can be called within shared Slack channels, teams that used to share screenshots in those channels can now call on Workbot to produce a chart simply by typing the command. This allows the conversation to keep flowing, eliminates context switching and makes it easy for the marketing team to measure impact.

Behavior-Driven Lead & Nurture

Getting Marketing Campaign Data into Constant Contact and Intercom



Workato hosts and takes part in a range of virtual and physical events. These events require targeted follow up based on the event the lead attended. We follow up in Constant Contact to send targeted email marketing follow ups and also need this information to go into Intercom for targeted in-app messaging. Currently, the marketing team manually creates lists in Constant Contact for each event, but because the number of events we participate in is increasing we are in the process of creating several recipes that bring information from all lead sources into Constant Contact for Email Marketing and Intercom for in-app communication automatically.

Unbounce to Constant Contact and Intercom

When we hold a special webinar or offer a special marketing promotion we often create landing pages for the offer on Unbounce. These leads will get added to corresponding lists in Constant Contact so that specialized emails can be sent to these leads automatically. Additionally a note that they signed up via the promotion will go into Intercom.

Eventbrite to Constant Contact

Leads who register for a Workato event on Eventbrite will get added to a specific Constant Contact list for that specific event so they can receive follow up emails and event reminders.

GoToWebinar to Constant Contact

When we hold Virtual/Online Events the Registration Forms are done through GoToWebinar. The attendees of each webinar need to be added to Constant Contacts on the "announcement" list so they can learn about future webinars unless they choose to opt out. They should also be added to a specific list for that particular webinar.

Google Sheets to Constant Contact

When we gather leads at conferences such as Dreamforce, Boxworks etc. they get stored in Google Sheets and must move into Constant Contact for follow up in addition to Salesforce (which was described above).

Marketplace Listings to Intercom

We have several Marketplace Listings on other apps' marketplaces. When someone is interested, we receive an email and need to move that lead information into Intercom so we can send them the appropriate in-app messages. (Data from Marketplace listings comes in various formats: Salesforce, AppExchange, Intuit Apps.com, ServiceNow, QuickBase)

"Our main problem before Workato was that the info updated in QuickBase did not update in Mailchimp so we had to keep exporting and importing information into Mailchimp. Now that QuickBase and MailChimp are connected, customers who have been on our program 10 months can receive different information than new customers."

DANIEL CARVALLO
CEO
CURA DEUDA

The marketing team benefits greatly from the ability to create and send email marketing materials to leads automatically without having to add them inside Constant Contact manually via the Intercom to Constant Contact recipe. However, these recipes for each lead source will allow us to segment our email marketing much more easily, as we can create different lists in Constant Contact and send different marketing material depending on where the lead came from. This results in a higher open and conversion rate, and reduces spam.

More Efficiency, More Sales

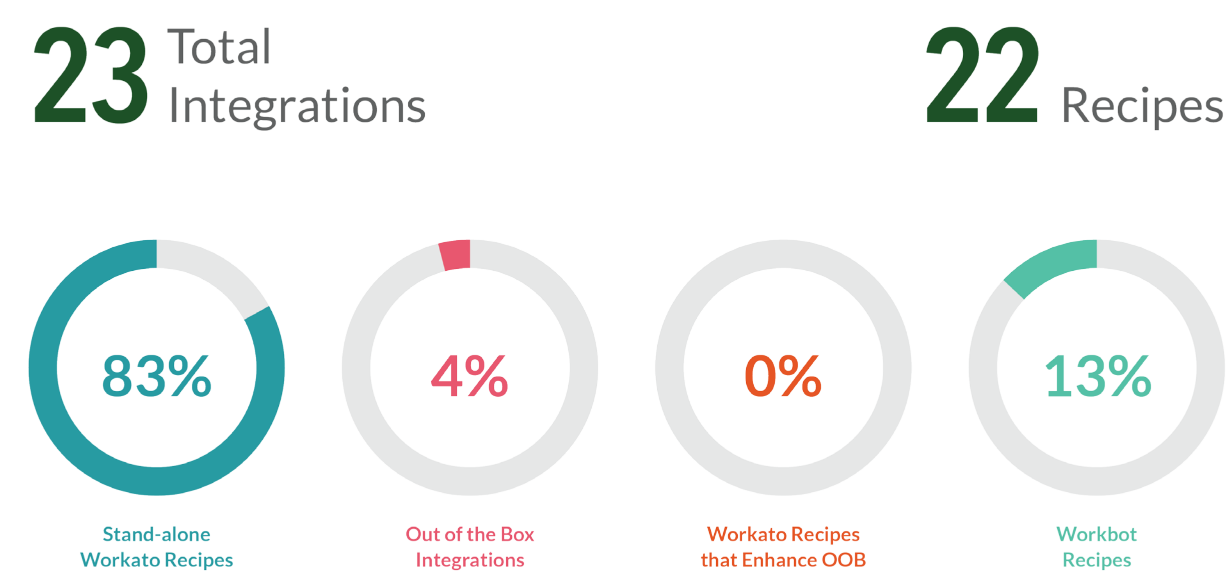
Fragmentation of Leads– One of the Most Common Productivity Killers

The process of lead gathering can fall into several different categories depending on how you structure your business - it may fall into the purview of traditional marketing roles and your sales team, or you could take a data-driven strategy such as hiring a growth hacker. Whatever structure you've chosen, lead gathering is an important part of any business model and acts as the driving force behind growing a business.

Once you have your leads, the next step is for the sales team to use these leads to convert interest into a full customer, but in order to do this the leads need to be in one place, ready to be contacted. They also need to be triaged, prioritized, tracked as customer touchpoint occur, and more. In order to make this as easy for the sales team as possible, your apps must work together. Otherwise, it will be difficult to hit sales goals as the team loses precious time on manual tasks.

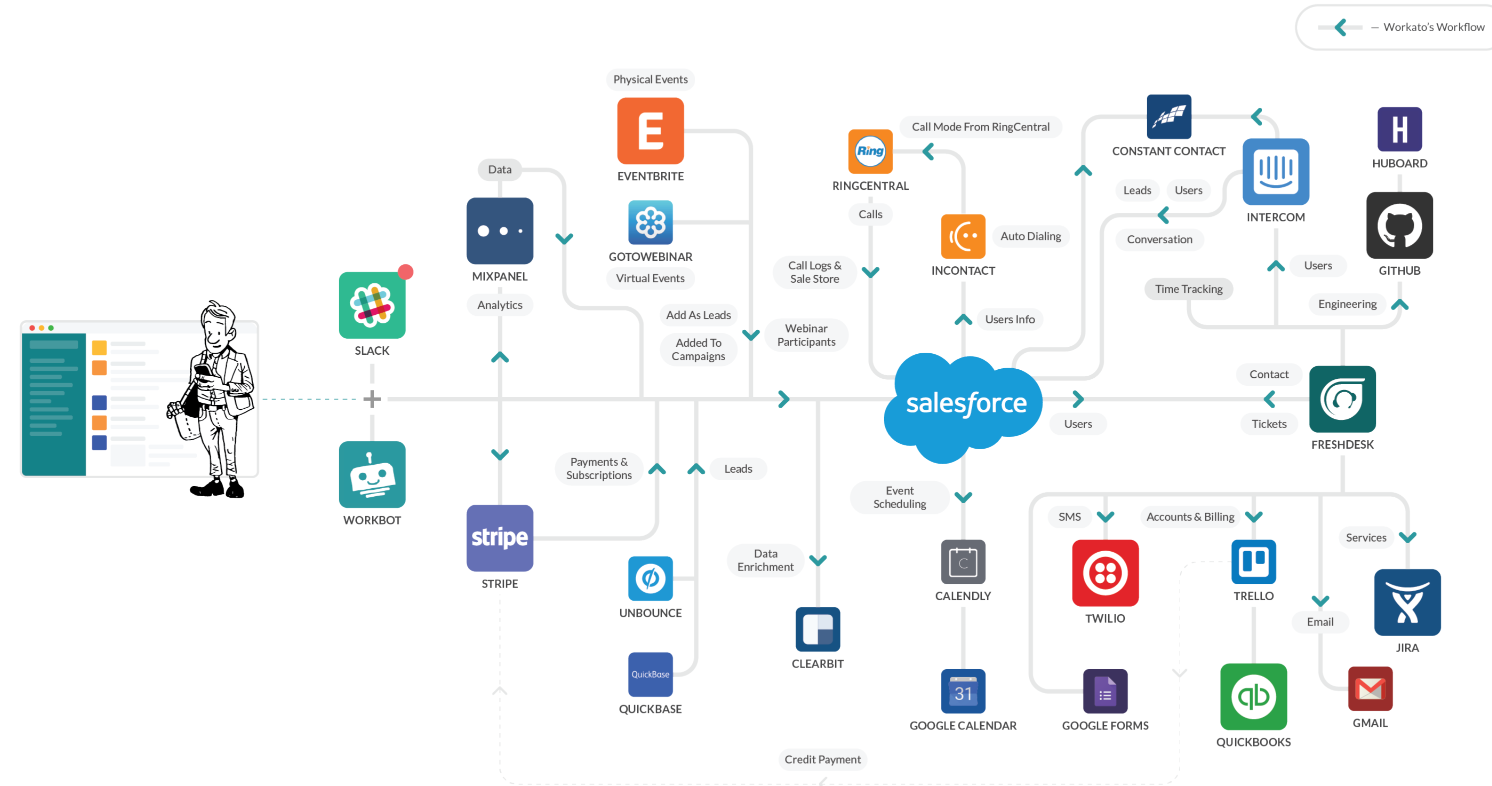
Common Sales Problems

- Fragmented leads meaning the leads are not automatically ready for the Sales Team to follow up on
- No 360° degree view of the customer as other information on them is trapped in other applications making the Sales team less informed
- No easy way to prioritize and triage leads
- No automatic alerts on where the customer is in their sales pipeline so follow up actions can happen immediately
- A manual quoting and signing process
- No easy way to on-board new customers when a Sales pitch is successful
- A slow process getting invoices signed and the money into your financial app



HOW **WORKATO** SOLVED THIS

SALES

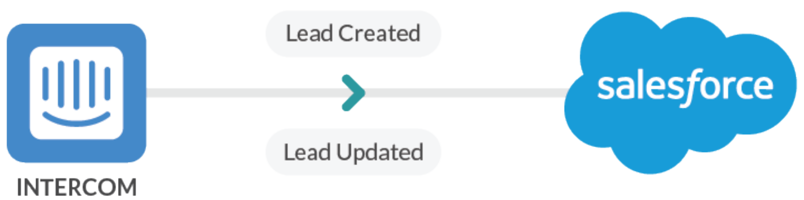


Our Sales leads come from several different sources and require the use of **17 different cloud apps** that either gather leads, help up communicate with customers and prospects, or store important customer information. Businesses like Verified First, the American Kennel Club and more are using Workato to get important customer information from one app to the other.

This chapter will cover the solutions we've created for the Workato Sales Team in the following categories:

Automated Opportunity Data Population

Syncing Website Leads from Intercom to Salesforce



User information from the Workato platform is sent to Intercom, which is the tool we use for customer engagement. It allows our Customer Success team to chat with customers on the platform as well as send them targeted auto messages via email or chat. However, Intercom is not a full customer relationship management platform so we also use Salesforce to manage leads, accounts, and opportunities. In order for our Sales team to have the same up to date information the Customer Success team is seeing in Intercom, it is critical that information from Intercom is automatically sent to Salesforce.

When we realized we needed this integration, the team found that effective integrations between Salesforce and Intercom did not exist. You either had to build a custom integration using Salesforce APEX code or buy a very expensive tool to do it. Because both Salesforce and Intercom allow a high degree of customizations, it's difficult to comprehensively integrate the two. For example, in Intercom we track customer data like 'Number of Recipes,' 'Number of Jobs' etc. and we have custom fields in both Salesforce and Intercom that are required to map in our integration.

The high degree of customizations also complicated things when it came to duplicate prevention logic. When automating with custom fields and custom objects, you need to define logic based on those fields and how they interact with other data in their system. For example, in order to prevent any duplicates the automation needs to search for a lead based on four criteria: 1. A custom field in Salesforce called "Intercom User ID," 2. a custom field called "User Email," 3. another field called "Salesforce Email" and 4. by the user's full name. It also needs to check if the contact already exists based on the same four fields mentioned above (Intercom User ID, User Email, Salesforce Email and Full Name). If any of the above fields match, the integration needs to update the contact/lead instead of creating a new one.

Workato easily handles Duplicate Prevention Logic but we needed a way to map one field to another that would ensure that duplicates would not be created based on a set of criteria that we choose. If any one of the criteria is met, the lead/contact should be updated instead of being created. In other words when there is a new user coming from Intercom into Salesforce, our integration needed to search contacts before searching for leads. If the contact is there, no lead should be updated or created. It also needed to search leads and Contacts in Salesforce to ensure that none of them have the same Workato User ID.

To ensure this level of customization, we created two Workato recipes to search/create leads/contacts in Salesforce whenever there is a lead or user is created/updated on Intercom.

When a new user is created in Intercom, Create/update Salesforce lead/contact

https://www.workato.com/recipes/202921

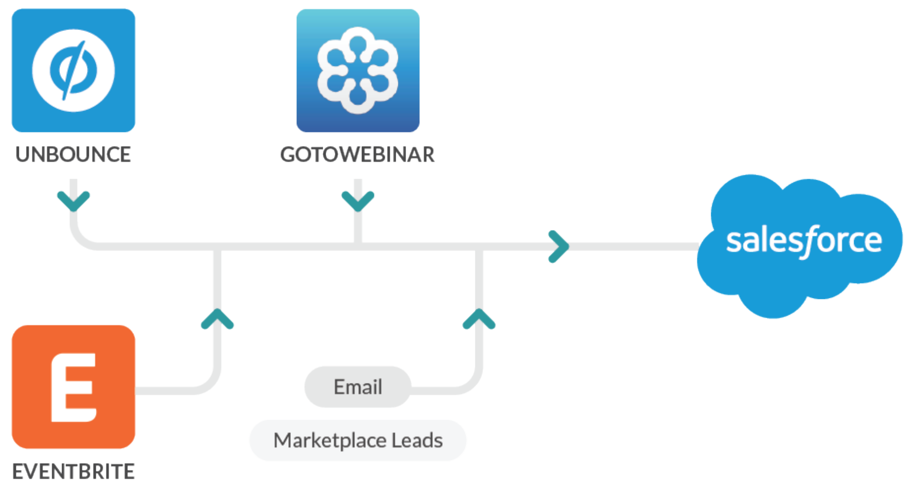
When a user is updated in Intercom, Create/update Salesforce lead/contact

https://www.workato.com/recipes/197654

Without this integration our sales team would be less productive due to context switching and wasting time logging in and out of apps. Automatically and dynamically moving all the necessary user data from Intercom to Salesforce saves our sales reps at least 1 hour per day each that would have been spent toggling between different applications. Those hours of work saved add up and Workato saves about $4000 per month in labor costs. With all the data ready to go in Salesforce, the sales team has more complete, consistent, and actionable information. When the sales team makes a call or reaches out to a lead, they have a full, 360 degree view of that customer's user activity inside of Salesforce.

Automated Opportunity Data Population

Syncing Marketing Leads into Salesforce



Our Marketing team uses several apps to generate leads such as Unbounce, Eventbrite, GotoWebinar, and our marketplace listings. We created several recipes to automatically add these leads to Salesforce and check to see if the lead already exists to avoid duplicates. You can find a more detailed account of this solution in Chapter 2: Marketing page 30.

Marketo Marketplace Listings to Salesforce:
https://www.workato.com/recipes/219316

Unbounce to Salesforce:
https://www.workato.com/recipes/272308

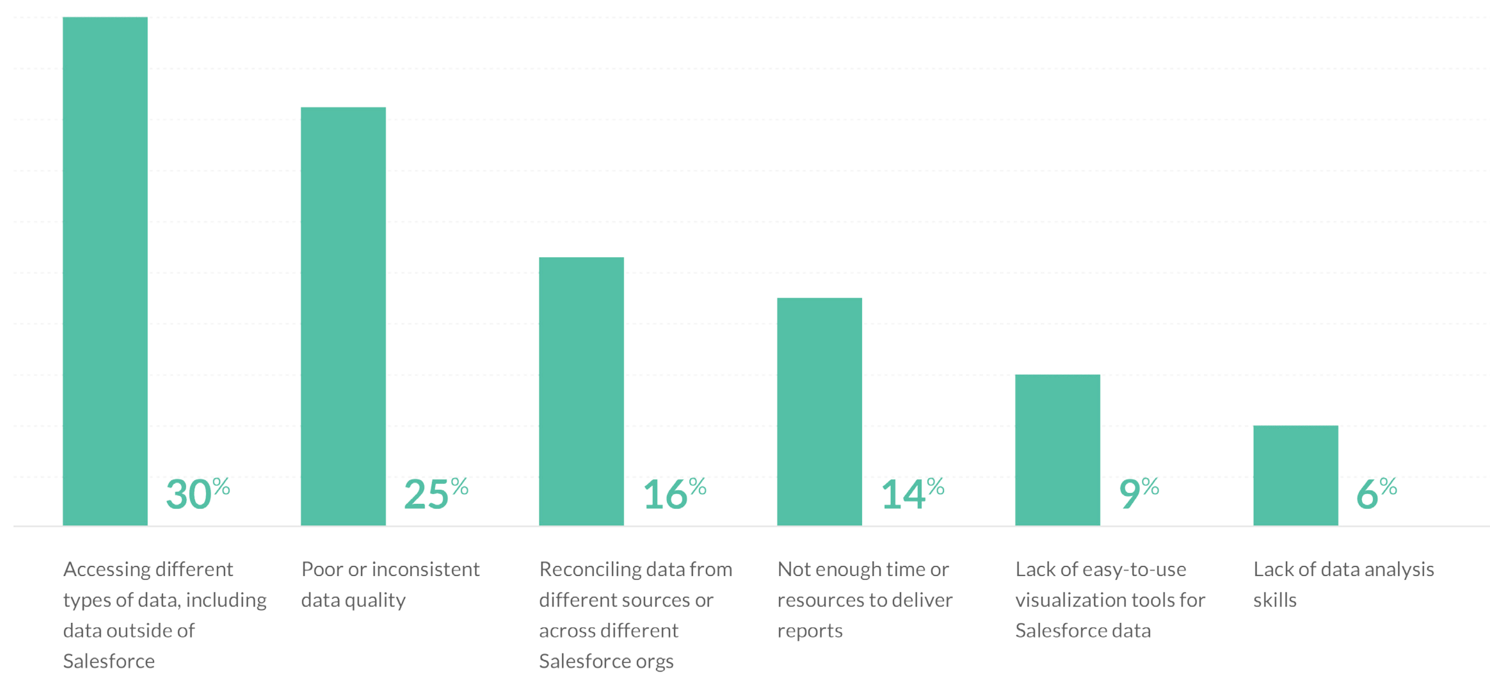
Eventbrite to Salesforce:
https://www.workato.com/recipes/330972

GoToWebinar to Salesforce:
https://www.workato.com/recipes/306830

By automatically routing the leads from the various marketplaces and marketing apps into Salesforce, Sales representatives do not have to manually create these leads inside Salesforce and Customer Service reps do not have to manually alert the sales team when a new ticket comes in. This saves everyone time and allows for a fastest follow up by the sales team. It also means we don't need the reps to worry about monitoring multiple apps which reduces work space clutter.

Sales' Top Data Issues

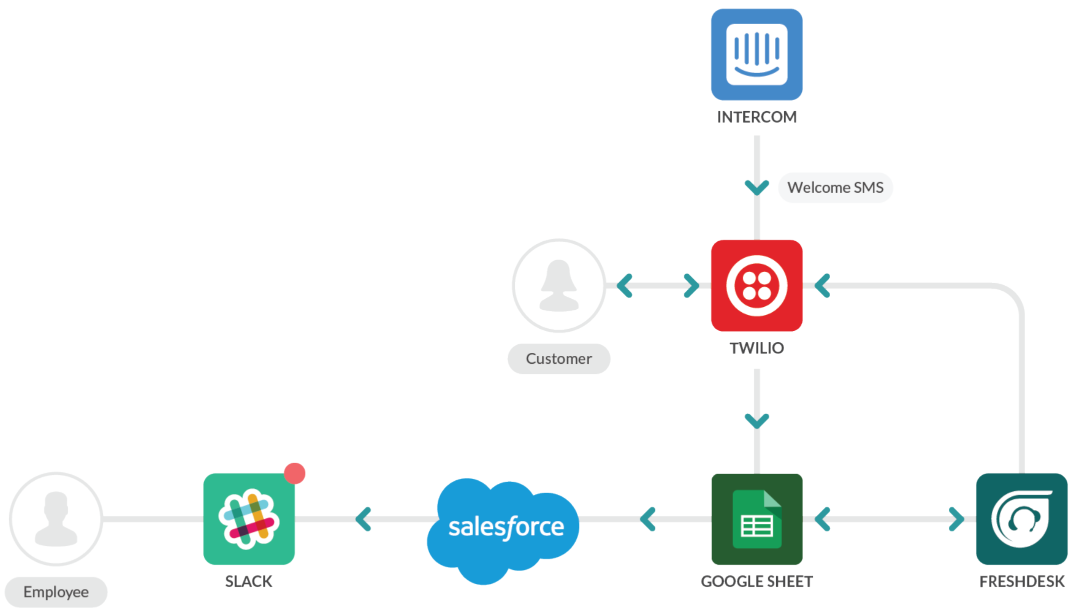
Salesforce's top barriers to deriving insights from Salesforce is limited access to data.



IBM Bluewolf, 2016. 2016-2017 Annual Report: The State of Salesforce. [Graph] Sales' Top Data Issues. Pages: 25.

Smart Customer On-Boarding

Automatically Sending SMS Messages with Intercom, Twilio, and FreshDesk



This solution works with the recipes in Customer Service under "Customer On-boarding with Google Sheets, Twilio, FreshDesk, Salesforce, and Slack" on Page 14.

To get the sales process started immediately, we wanted to send out an SMS message to new users automatically. After we send the welcome SMS, our customer service reps need triage the message and assign it to the correct group. If the message needs to go to Sales, the sales team then needs a way to easily communicate via SMS with leads who reach out. To set this up, we needed a way to automatically send the welcome SMS, then create an easy method for the Sales team to reply to SMS replies without having an individual with a physical cell phone. These SMS replies needed to be assigned to a group and not a specific sales agent. Our reps also needed the ability to connect the SMS replies with the corresponding Freshdesk Ticket and the corresponding customer on Workato.

We created 3 recipes to complete all of these tasks, helping both the Sales and Customer Service teams easily SMS with customers. The first recipe automatically sends the text message via Twilio when a new user is added to Intercom.

1. When a new user registers on Workato, their data is sent to Intercom. If they have provided a phone number this recipe will automatically send a welcome SMS to the new user via Twilio, then update the Google Sheets Record.

https://www.workato.com/recipes/140645

The other two recipes were covered in the Customer Service chapter on page 14. One recipe posts SMS replies on Freshdesk and another recipe to allow Sales Agents to reply via SMS message in the same Freshdesk Ticket, both keeping the Google Sheet up to date.

2. This recipe for Inbound SMS creates or updates a Freshdesk Ticket when Twilio receives an SMS as well as updating Salesforce and posting a message to Slack. This allows the customer service team to view the message without leaving Freshdesk so they can assign it to the correct party.

https://www.workato.com/recipes/140737

3. This recipe for Outbound messages allows the Sales Team or whoever was assigned the message to reply to the customer straight from FreshDesk instead of using a physical mobile phone.

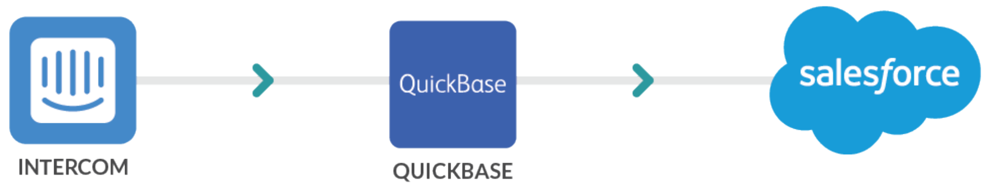
https://www.workato.com/recipes/273601

Sending an SMS message automatically gets the conversation started and helps us be attentive to our new customers, letting them know that we are there and ready to help. Thanks to the recipes that bring the messages into FreshDesk and send SMS from FreshDesk, the rep does not have to do any extra work to send a response.

Making SMS text messages an easy option for both our leads and our sales team by integrating Intercom, Twilio, and Freshdesk allows for more personalized interaction with customers. In fact, some customers prefer texting us instead of going to Workato.com to Live Chat or submitting a ticket on Freshdesk. The sales team also benefits from the ease of SMS because they can reply SMS from Freshdesk without having to go to a separate platform or worrying about logging the conversation.

Smart Customer On-Boarding

Partner On-boarding: Partner Information from QuickBase into Salesforce



This solution works with the recipe in Customer Service under "Partner On-Boarding with QuickBase and Slack" on Page 16.

Workato strategically partners with companies to create the best integrations for that product to be used internally or by their customers. One partner, QuickBase, offers specific pricing for Workato based on the number of users they have in their QuickBase account as well as their App Tier. In order to give the correct price to each customer, Workato needs to access information about their QuickBase plan.

To do this, Workato Sales Agents had to gather information on individual QuickBase accounts, requiring them to log into QuickBase, search for the relevant information and manually add it to Salesforce. This not only wasted time, but also left room for error, resulting in a bad customer experience for new QuickBase sign ups. We knew we needed to automate this process so leads coming from our partners could have a seamless onboarding experience, however QuickBase and Salesforce are both highly customized apps. For this reason, there were no existing integrations that could handle our custom objects and fields available.

To solve this, we created a Workato recipe to automatically pick up the segment of users using the Workato QuickBase connector from Intercom and send it to QuickBase:
https://www.workato.com/recipes/250665

Once Workato has fed QuickBase the accounts we want to know about, our second recipe updates the Salesforce Lead or Account Information whenever there is an update from QuickBase:
https://www.workato.com/recipes/279966

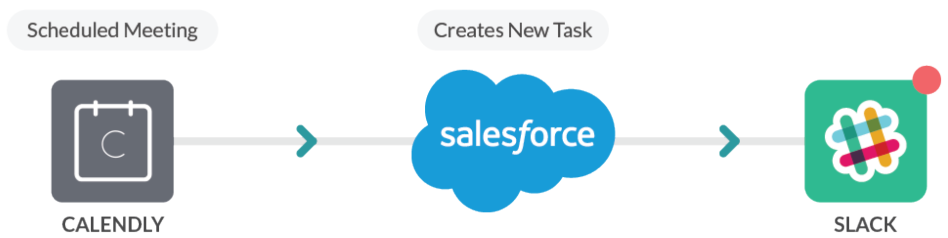
Now, Workato automatically provides QuickBase with a specific list of customers using the Workato QuickBase connector from Intercom. Then, based on their Email Address, QuickBase provided Workato information about their account (i.e. number of users, QuickBase Plan etc.). This makes it easy for sales reps to see their QuickBase plan without ever leaving Salesforce and provides a smooth onboarding experience for the customer.

"We use Salesforce to house all of our donor information and before we had to take a file and manipulate it to be compatible to other software and import that as a CSV file. Workato is extremely efficient, clean, mapped accurately and tells us exactly what we want. We've been able to really take out data we never thought we would be able to have. We're starting to collect statistical data in Salesforce, and we've been able to slice and dice financial information for better decision making. Workato has been a great tool allowing both Salesforce and Intacct to speak to each other - it's the glue that brings it together."

ANN CHACKO
OPERATIONS MANAGER
T4 GLOBAL

360° Prospect and Customer Intelligence

Tracking Meetings and Product Demos in Calendly and Salesforce



The sales team uses Calendly to schedule most meetings and demos with customers/prospects. Calendly does a great job of providing customers an easy way to find a suitable time that our team is available to meet by allowing them to click on a link and see that person's availability. It also gives customers the information they need to join the meeting, usually a RingCentral link. The sales team is required to log these calls within Salesforce as a Task.

While Calendly automates the scheduling of the meeting, logging a new task in Salesforce can be a tedious process, especially when creating a task from scratch when many fields are required to be filled. This takes a lot of time and leaves room for error as sometimes Sales agents forget to log their call.

To finish the loop, we created a Workato recipe to completely automate the meeting process. When someone schedules a meeting in Calendly, Workato will automatically create a task in Salesforce with the relevant details from the scheduled meeting. If the lead/contact is not present in Salesforce, the recipe will also create one for the agent. The agent will also receive a notification on Slack when a new event is scheduled on Calendly. All that is required of the Sales rep is to conduct the meeting and simply mark the task as completed in Salesforce once finished.

https://www.workato.com/recipes/196699

Integrating Calendly, Salesforce, and Slack saves our sales agents time and ensures accuracy by eliminating manual data entry. The sales rep also gets a notification when the meeting is scheduled, doesn't have to worry about creating a new account in Salesforce if the lead doesn't exist, and simply clicks a completed checkbox in Salesforce to mark the task as completed. The history of meetings are logged in Salesforce, which allows the team to better understand any previous interactions with the customers before future meetings.

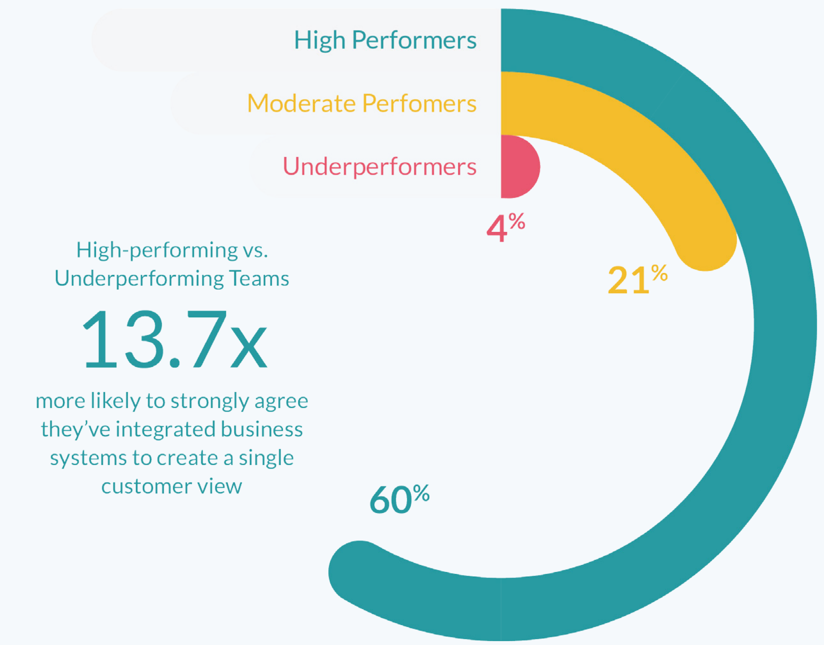
Top Marketing Teams Create a Single View of the Customer

High Performers don't see channels as barriers and are more likely to obtain a single view of the customer.

High performers are 13.7x more likely than underperformers to strongly agree they've integrated business systems to create a single view of the customer.

64% of high performers also say they are excellent at creating a single view, versus only 4% of underperformers.

Percentage Who Excel at Integrating Business Systems

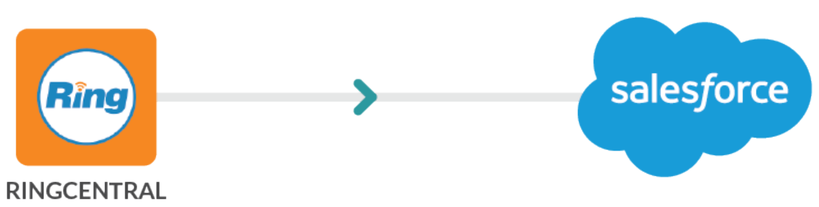


Adding Workbot

To take this automation a step further, we are working on a separate Workato recipe for Workbot which will ask the agent how the meeting went in Slack. The agent can reply to Workbot in Slack to mark the task as completed in Salesforce and add additional notes / description to the task. Workbot will will mark the task completed and add the notes in Salesforce while the agent never has to leave Slack.

360° Prospect and Customer Intelligence

Call Information from RingCentral Automatically Added to Salesforce



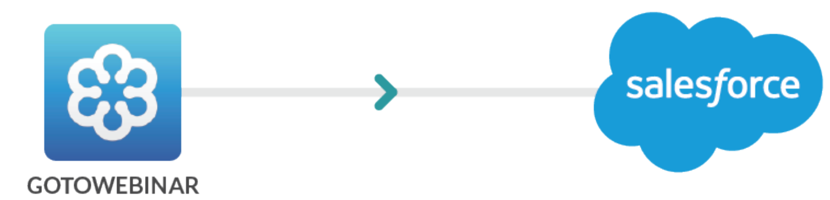
Each sales agents is assigned to manage several leads that they will track through the entire customer lifecycle. If one of their leads makes a call to Workato, that specific agent needs to be notified. Without logging incoming phone calls in Salesforce, the team won't be able to easily track and view their lead's call activity.

Phone calls are handled through RingCentral, which is not linked to any other app and is standalone. We also have a custom object in Salesforce to store inbound sales data. Unfortunately, there is no prebuilt integration to sync RingCentral to our custom object so we've begun working with RingCentral to build out a connector for RingCentral on Workato.

When this connector is built out, a recipe will retrieve inbound call data from RingCentral. Then, it will search Salesforce based on the inbound call number and create an entry in a custom call object to save a log of the call. The result is that all historical conversation between customers will be automatically stored and available inside Salesforce, allowing our agents to easily track the customer and creating a better customer experience.

360° Prospect and Customer Intelligence

Syncing Customer Webinar Activity from GoToWebinar to Salesforce



Workato hosts an array of webinars every week/month on GoToWebinar including:

Public Webinars

- Introduction to Workato Webinar (Weekly)
- Troubleshooting Workato Recipes Webinar (Weekly)
- Workato Expert Hour (Twice a week)

Partner Webinars

- Partner Program Introduction Webinar (Weekly)
- Partner Orientation Webinar (Weekly)
- Partner Monthly Updates Webinar (Monthly)

Special Webinars (Ad-Hoc)

The Sales team needs to know which customers attended each webinar and their interaction during it to look out for upsell opportunities and to provide customers with the information they need to get the most out of Workato. Unfortunately there was no easy prebuilt solution to get this customer data into Salesforce.

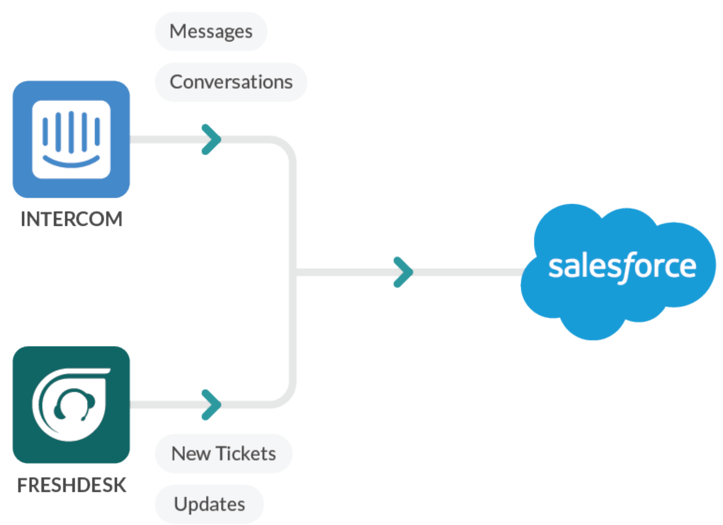
We created a recipe that takes all of the GoToWebinar attendees for each webinar and adds a campaign in Salesforce.

https://www.workato.com/recipes/306830

This allows the sales team to provide intelligent, targeted follow up. By putting the webinar information into Salesforce, the rep can use this and all the other information on the customer to immediately get a full picture of their business processes and what might be

360° Prospect and Customer Intelligence

Getting Customer Service/Marketing Touchpoints from FreshDesk and Intercom into Salesforce



Information about tickets made by customers exist on separate systems as they can contact Workato by Phone (RingCentral), Live Chat (Intercom), or Email / Tickets (Freshdesk). In order for the Sales Team to get a full picture of a client's data, they would have to access several different portals in order to check chat information, ticketing information and/or call information. We needed to get all of this information into Salesforce.

Trying to move information from Intercom and FreshDesk into Salesforce resulted in several roadblocks:

- Standard pre-built integrations could only sync up customer level information - not ticket level information from FreshDesk or chat level information from Intercom.
- These tickets have a complex data structure, as one Ticket or conversation generally has many public and private notes attached.
- Not all chats, ticket types, or tickets from groups should go into Salesforce, so we needed to filter what tickets and conversations were going to get sent there.
- We also needed the ability to inform the sales rep assigned to a account/lead/opportunity if their clients posted an enquiry. If it is Intercom it needs to be a real time notification.
- For Sales Enquiries, if there is no owner, the relevant team needs to receive a notification.

We created 2 recipes to push information in the way we wanted it from FreshDesk Tickets into Salesforce. The first moves new tickets into Salesforce and the second moves any updates done to a ticket into Salesforce.

https://www.workato.com/recipes/309080

https://www.workato.com/recipes/309369

Whenever a FreshDesk ticket is updated, the recipe will create a FreshDesk Ticket in Salesforce. FreshDesk Tickets in Salesforce are linked to the Ticket by the Lead/Account in Salesforce. If the lead/account does not exist, the recipe will not create one. We specifically configured the recipe this way because the sales team only requires ticket Information regarding sales leads. A direct link to the original ticket in FreshDesk is also inserted into Salesforce automatically so the rep can easily access the actual ticket and respond to the tickets in FreshDesk directly. These recipes make it easy for the sales team to correspond with the customer via the Freshdesk Ticket and the Account/Lead/Opportunity owners will automatically receive a notification if any of their customers post a ticket. The recipe also makes this information retrievable inside of Slack.

To move Intercom conversations into Salesforce, we created two custom objects in Intercom - Intercom Conversations and Intercom Messages. Intercom Conversations are related to Leads, Accounts and Contact. Intercom Messages are related to its parent conversations. We then created recipes to push Intercom Conversations and Messages to Salesforce:

https://www.workato.com/recipes/251066

https://www.workato.com/recipes/218136

One recipe trigger occurs when Intercom Conversations are created and the other triggers when there is a new message/update. The recipe posts a direct link from Salesforce to Intercom. If the lead/contact does not exist, the recipe will not create one as the sales team only needs to know about leads. The Account/ Lead owners will receive a notification if any of their customers creates a new conversation. This is also retrievable from Slack thanks to Workbot.

The integration between Salesforce, FreshDesk, and Intercom gives Sales Reps a full view of their customer's activity from within Salesforce. The likelihood of closing a deal with a highly engaged lead is much larger, which is why informing the sales reps to contact their customers who have tickets open or a conversation started allows them to stay on top of the leads with the most promise who need assistance. Creating easy access to the original FreshDesk Ticket straight from Salesforce allows Sales reps to quickly follow up on customer related tickets and check the status of their client's issues. This integration saves Sales rep at least an hour per day that would otherwise be spent switching between apps and finding the relevant customer details in both apps. It reduces the number of windows that Sales Reps need to open, reducing clutter and allowing Sales reps to focus their attention in one app - Salesforce.

360° Prospect and Customer Intelligence

Automating Billing and Customer Payment History with Stripe and Salesforce

Payment history is another piece of vital information needed for each customer when identifying upsell opportunities and for context during demos and conversations. Workato is primarily a subscription based service where customers pay per month or for the whole year. The payment processing app Stripe automates our collections, automatically billing customers according to their plan.

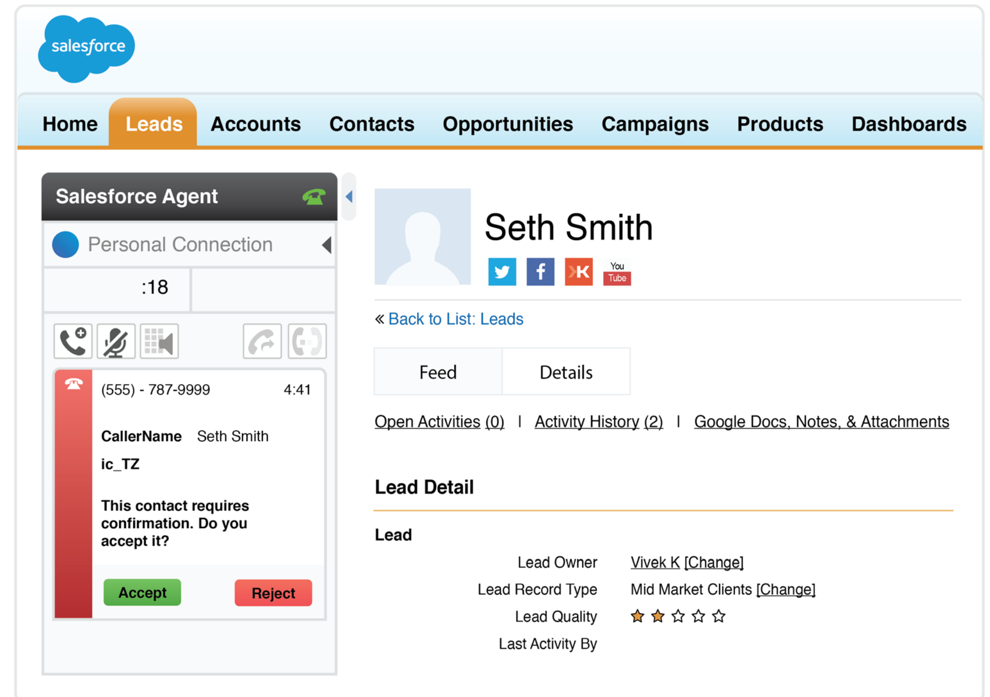
Our sales team needs to see payment history in Salesforce instead of logging into Stripe. To make this automatically happen, we created a recipe that updates the corresponding customer's profile every time Stripe charges them. We realized that new payments also act as a good tracker for the progress of the sales team, so we decided to add notifications to Slack. After the recipe adds the payment to Salesforce, it will post in the Slack Channel called "Stripe-Payments" anytime a new card is added, a new subscription is created, or a payment is made. The notification includes a link to the customer's Salesforce profile for a quick 360 degree view of the customer.

https://www.workato.com/recipes/215604

This automation makes payment history readily available to the sales team in both Salesforce and Slack without any employee labor. This helps the team identify upsell opportunities, and allows the company to discuss client issues or situations in Slack with all the information available in the channel.

Lead Prioritization

Using Information from Intercom to Prioritize Leads with InContact/Salesforce



This process is made possible by the Intercom to Salesforce recipes on pages 54 & 55.

The Sales Team uses a native Salesforce app called InContact to autodial calls, prioritize leads and more. In order for InContact to prioritize leads, it needs certain information that is stored in Intercom. The recipes described on the previous page that move detailed information from Intercom to Salesforce allow for the information InContact needs to automatically populate in Salesforce so our lead prioritization process is automated.

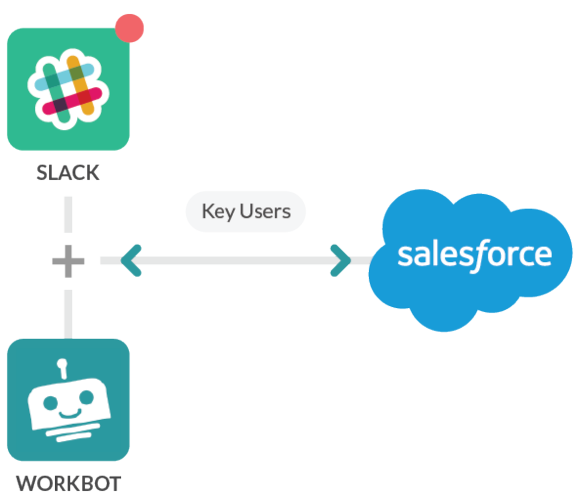
https://www.workato.com/recipes/251066

https://www.workato.com/recipes/218136

When our sales reps log into Salesforce and open InContact, all the leads are prioritized and ready to go. They can simply begin going down the list, making their calls.

Sales Process Optimization with Automated Prospect Touchpoint Alerts

Getting Notified in Slack When Key Users Sign Up and their Interactions in Intercom and FreshDesk



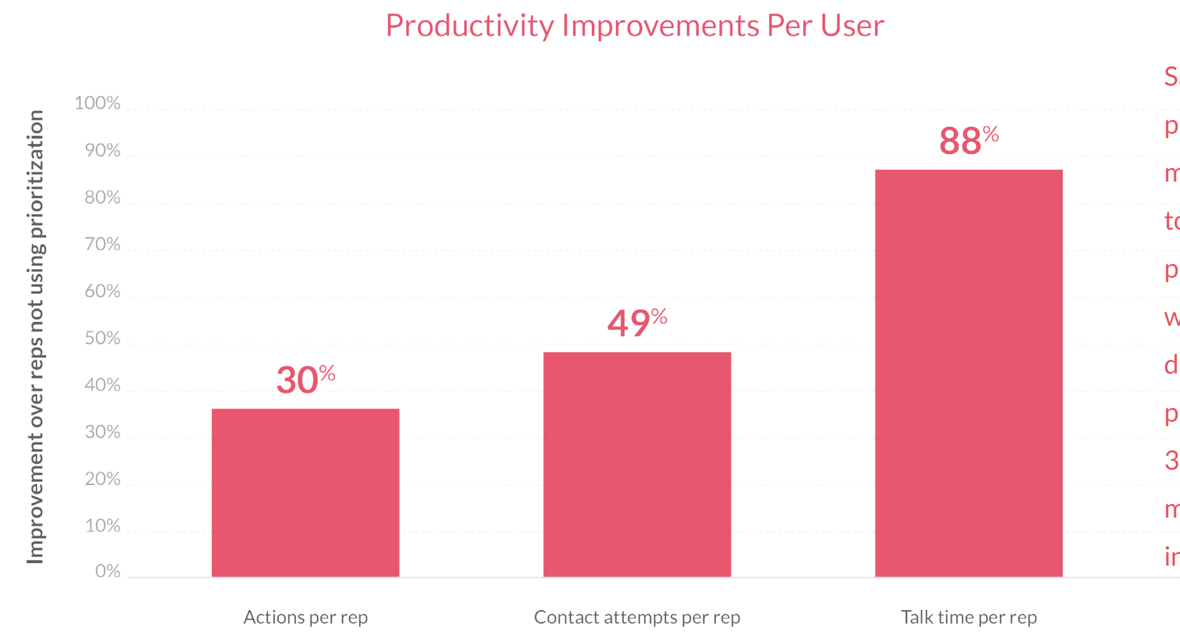
Whenever there is a key user that signs up on Workato, the Sales team wants to know. A "Key User" includes users from well-known companies or users with certain job titles. When they sign up, the team will get a notification in our Slack channel "Key Users." These key user leads/contacts frequently contact Customer Success for recipe help or about sales enquiries. The sales agent assigned to manage these leads needs to know when key users create conversations in Intercom or tickets in Freshdesk so that they can contact them immediately to provide assistance. In the past, Customer Success had to manually identify the specific sales agent that was managing the lead/contact if they submitted an enquiry so that the lead/contact got a consistent message from a single point of contact. The sales team as a whole also needed to get timely notifications if there was a sales enquiry but no representative attached.

When we set out to solve this problem, there weren't (and still aren't) any out-of-the box integrations that could control what kind of notifications you get, they were just a firehose of notifications. There was also no way to create customized Slack post logic ie. only a specific type of user should be sent to the Slack channel, and the use of custom fields. In other words, when a user interacts with Workato on any of our customer-facing platforms, only the sales agent managing him should be notified. Notifications shouldn't be sent out to every sales agent and create unnecessary spam. However, if that lead is not managed by any sales agent, the sales team should be notified so that someone can pick up the lead and handle their requests. The only option besides Workato to make this happen was to create custom code to send this notification, which would take a lot of time and money.

We created a Workato recipe that posts a notification in the "Key Users" Slack channel whenever a user that meets a certain criteria signs up (e.g. Mid Market / Enterprise Customers):

https://www.workato.com/recipes/309379

How Much Does Lead Prioritization Increase Productivity?



Sales people who used prioritization were able to manage 12% more prospects to manage 12% more prospects per sales person and when compared to those who didn't prioritize, those using prioritization were able to take 37% more actions, make 49% more contact attempts and increase talk time by 88%.

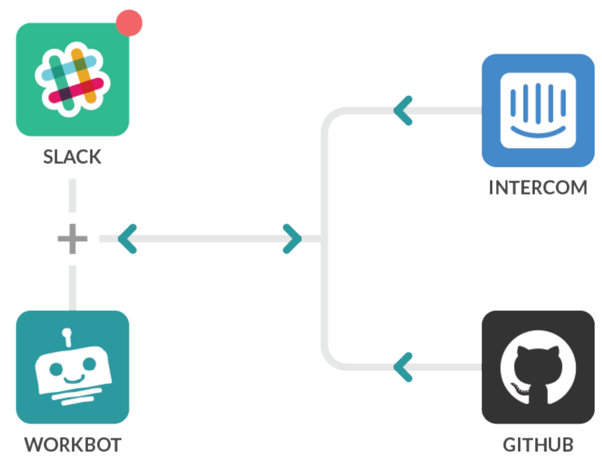
A direct link from Slack to the Salesforce Lead with the relevant information is included in the notification. In order to notify specific agents, using Workbot's notification filters, we created a recipe that can filter out who to send the notification to by searching Salesforce for the owner of that lead/contact record. All sales agents subscribe to their specific notifications by using the "my" (a.k.a. 'Show me my leads') command so that they receive notifications only for their own leads/contacts. Using certain customization options in the recipe, like if the lead is unowned and the kind of enquiry the user is making, the 'Sales' Slack channel can also receive notifications, but only for unowned leads and sales enquiries.

This specialized Slack integration allows the sales team to be notified of important users and potential customers without spamming them with a notification every time someone signs up. It allows our agents to focus on the most important customers first and the direct link from Slack to the Salesforce makes it easy for agents to find out more about the customer. This increases productivity and helps close strategic deals.

Thanks to Workbot, Sales agents only get notifications for their own leads (or unowned leads) and can tend to their lead/contact's questions in a timely manner instead of having them get lost in the sea of tickets/conversations. The unowned leads who contact Customer Success and are qualified, are also sent to the sales team automatically so the sales team can pursue these leads while their interest in the product is still high. This helps the sales team close the deal with less effort than contacting a cold lead.

Sales Process Optimization with Automated Prospect Touchpoint Alerts

Bringing Prospect Touchpoints from Github and Intercom into Slack

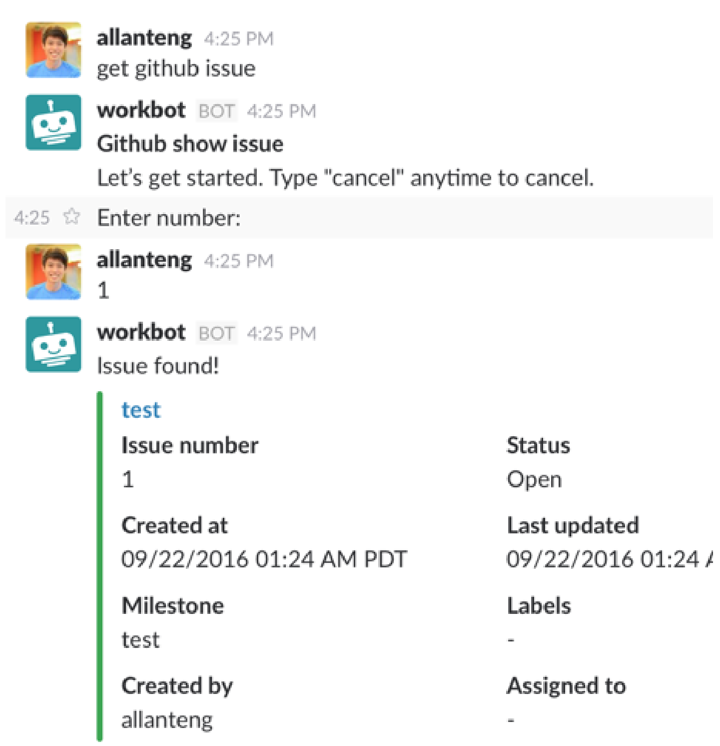


Our sales team reps often collaborate in Slack and when referencing an issue that a customer has, the sales team has to leave Slack, log into Github, find the ticket, check the status and return to Slack. There was no easy way to customize or directly pull information into Slack from Intercom, where we live chat with customers, or Github, where we track all engineering requests.

We created a Workato Recipe for Workbot for Slack that allows our Sales Reps to check the status of their issue on Github by simply asking Workbot:

https://www.workato.com/recipes/275074

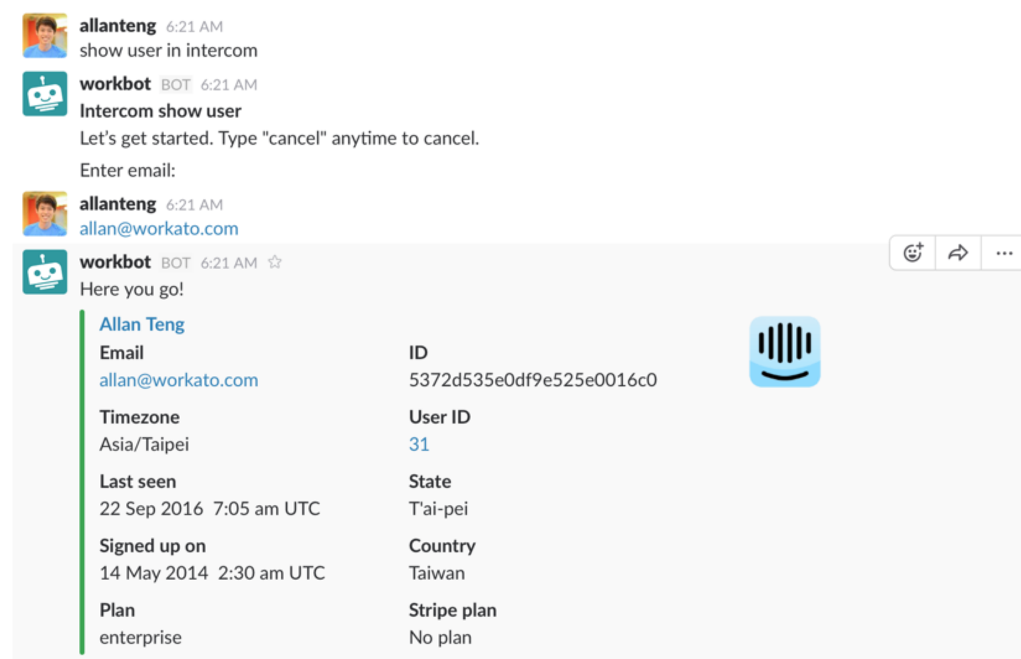
The Sales rep often have related client issues on Salesforce and can use this Workbot command to interact with the Github Issue straight from Slack.



To solve the Intercom issue, we created a recipe that allows users to say "show intercom user" and a prompt for them to type in the email address of the user. This pulls up key information about the user from Intercom and displays it within a conversation.

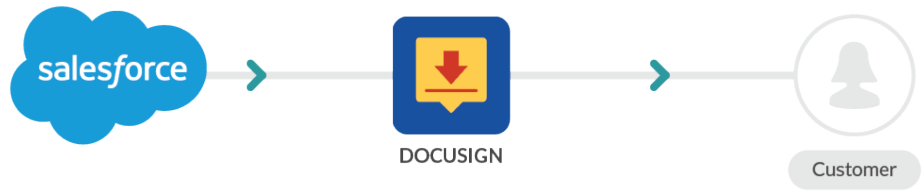
https://www.workato.com/recipes/218350

By using Workbot to interact with Github, sales representatives don't have to leave Slack to find the information they need. This eliminates context switching, makes collaboration easier, and helps make them more productive. Being able to view customer data from Intercom inside of Slack saves time and gives all the information the sales team needs in one place. They also enjoy direct links to the Intercom User's profile so they can Live Chat or check their history by clicking on the person's name. Or they can click on the email address to send them an email. Workbot let's the Sales team have better conversations on Slack with contextual and actionable information.



Streamlined Quote and Sign

Deploying Contracts from Salesforce using DocuSign

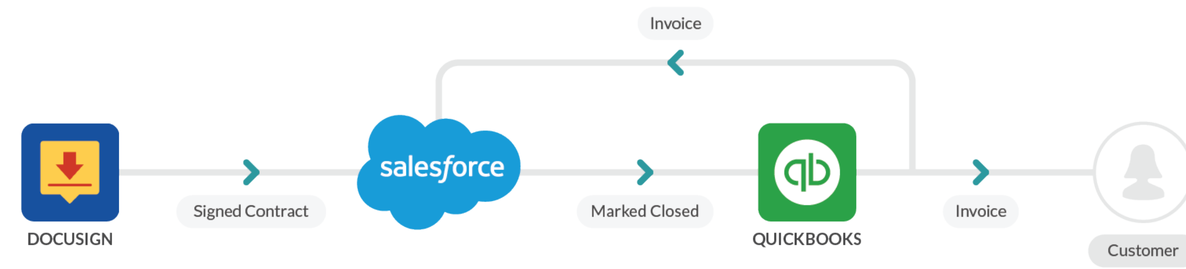


We are currently in the process of automating our workflow for enterprise and hybrid deals which require the use of contracts instead of the standard subscription workflow using Stripe (page 56). The recipe will allow sales reps to trigger a pre-populated contract using information from Salesforce in DocuSign when they mark a deal as "Closed" on Salesforce.

To see a similar contract workflow in action, check out how we automate our Partner Program sign up process in the BizOps chapter on pages 80 & 81.

Order to Cash Acceleration Through Automation

Automatic Invoicing with Salesforce, QuickBooks and DocuSign



We are in the planning stages of automating our invoicing process. The planned workflow will begin when the DocuSign agreement is signed. A sales person will trigger the invoice from Salesforce, which populate the invoice in QuickBooks, send the invoice, and put the invoice back into Salesforce so the invoice and profile are linked.

Streamlining BizOps and Productivity

Make Everything from DevOps to Reporting Easier

Collaboration between several departments and the apps used in those departments is inescapable and, unfortunately, it is seldom easy to achieve a seamless discourse between all the parties involved in making everyday business processes run. These silos of information and communication are the biggest issue in most businesses and the root cause of most customer complaints a company could encounter.

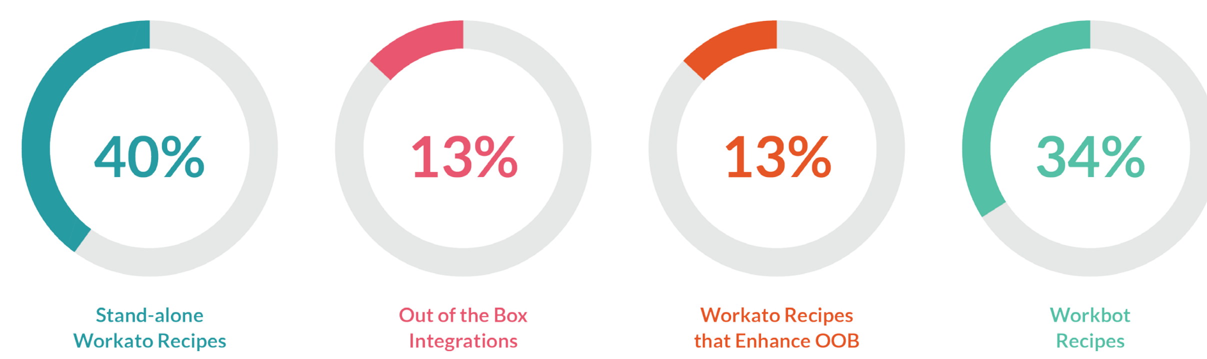
Common Biz Ops Problems

- Getting information from app to app in the format you want
- Project Management across apps and departments
- Communication with the engineering team
- Passing comments back and forth between Engineering and the rest of the company
- Automating long processes like on-boarding and reporting

Much of our own BizOps centers around the Services and Engineering teams. Workato is a self-serve integration platform, meaning that most of our customers sign up and build recipes on their own or through a consultant who is part of the Workato Consulting Partner Program. However, we do offer some services such as professional services (creating integrations for you) or our free 1 hour quick-start calls where a customer can work with a Workato expert to build recipes and design automations. When a customer requests these services, the request is received in the Freshdesk ticketing system. The Customer Success team then has to inform the Services Team, who tracks projects and requests in JIRA. The Services Team also spends time in Slack, our team communication tool, and works closely with the Development Team, who tracks issues in Github.

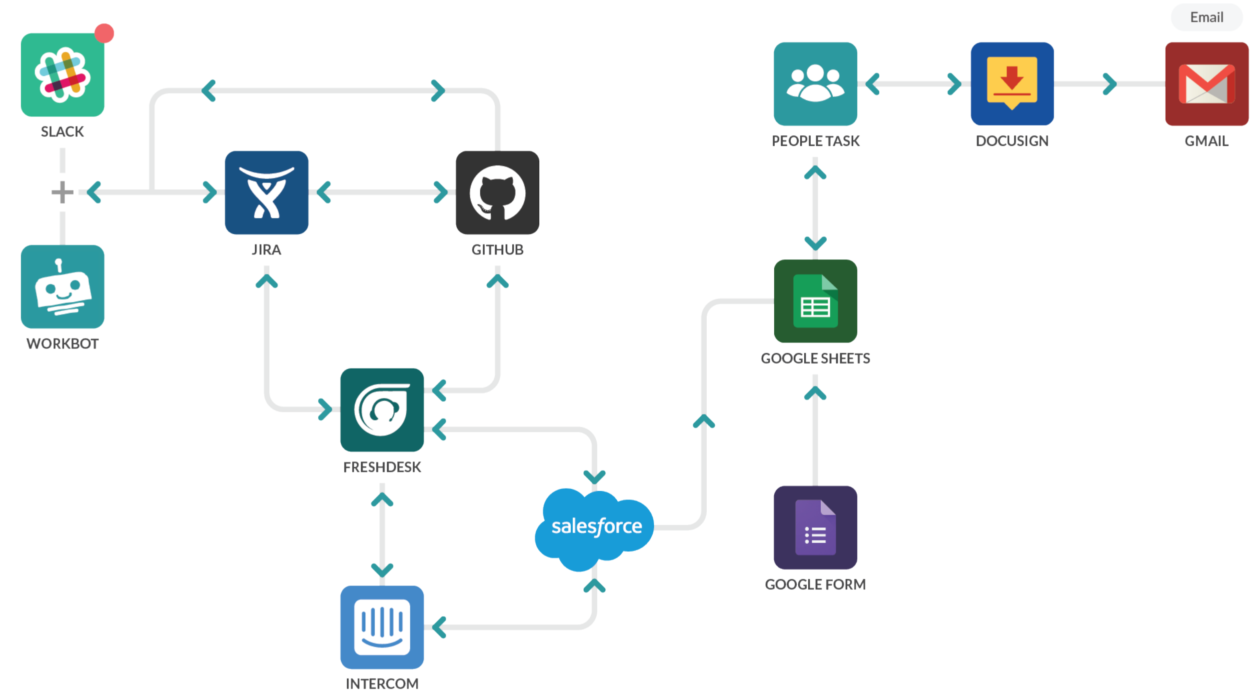
15 Total Integrations

13 Recipes



HOW **WORKATO** SOLVED THIS

BIZ OPS



To optimize the workflow of our Services Team and the departments it overlaps with, such as Customer Success and Development, we use several recipes to connect Freshdesk, JIRA, Github, and Slack. In some cases, **pre-built integrations are used in tandem** with Workato recipes which are necessary to fix the holes in the pre-built integration. For example, pre-built integrations often do not have the ability to pass comments back and forth to Github or JIRA.

This chapter will cover the BizOps solutions we've created in the following categories:

Collaboration & Communication Between Multiple Departments

Handling Account Changes via FreshDesk, Intercom, Trello, and Slack

FreshDesk is the ticketing system that customers use to submit support tickets however, Trello is used by the accounts management team to track account-related tasks and their statuses. For example, when a customer wants to upgrade their account or needs a refund, a new Trello card marks this task.

We needed a way to notify the accounts team of account-related tickets raised by users without having Customer Success agents notifying them manually and individually. After the issue has been processed, the Account Management Team also needs to respond to the ticket in FreshDesk to inform the customer about the changes, or if they have any clarification. Unfortunately, there was no way to notify the account team of any accounts-related requests by customers promptly or any easy integrations between Freshdesk Tickets and Trello.

To solve this, we created some custom fields and Workato recipes to make account changes seamless.

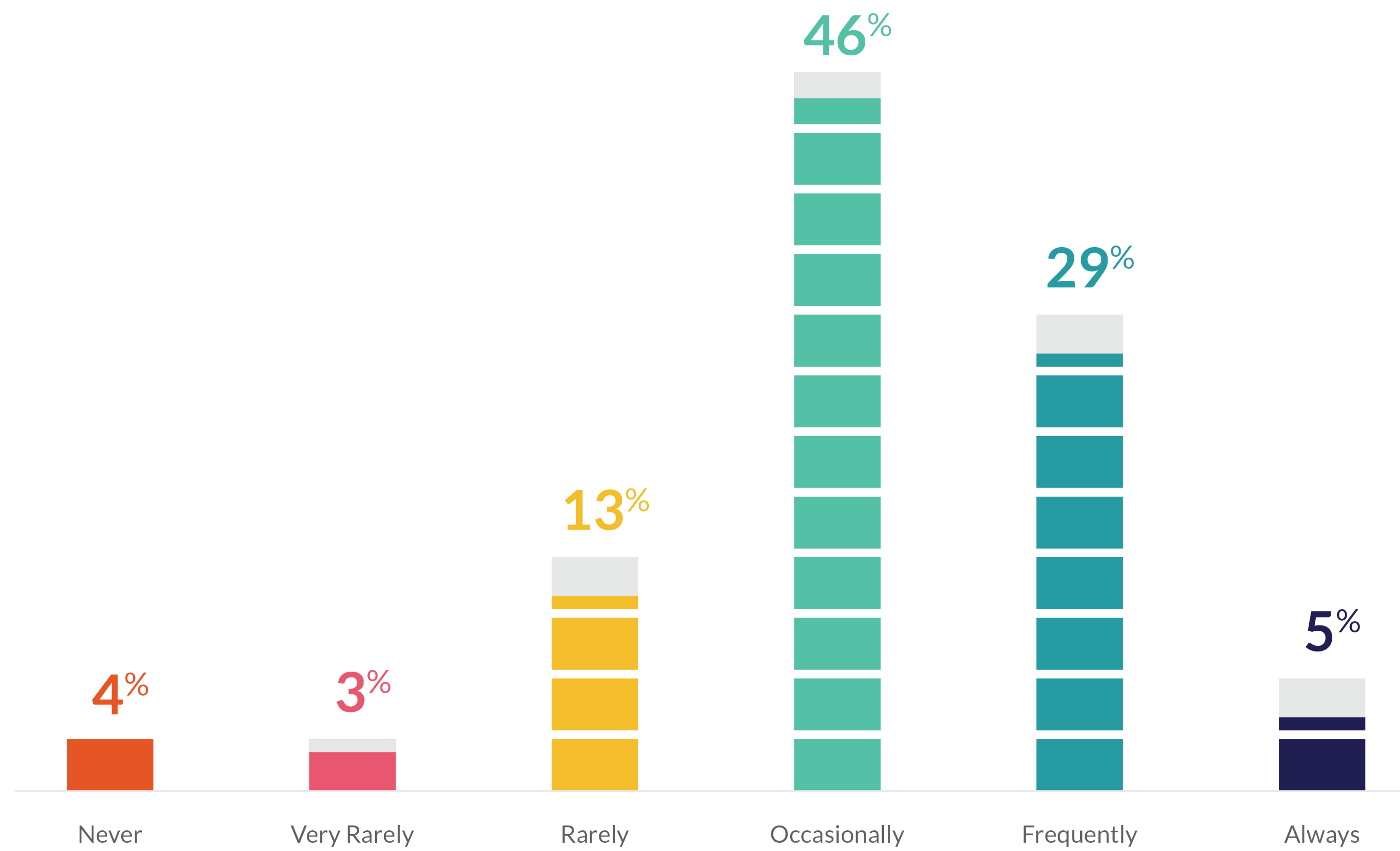
First, the Customer Success agent triages tickets and if the ticket is accounts-related, they select a “Send to Trello” (Custom Field in Freshdesk) option with key instructionsBfor the accounts management team. A recipe picks up the ticket information and creates a Trello card with a standard template. The card contains key information from Intercom and Freshdesk, like the instructions from the Customer Success agent. After the card is created, a notification is created in the accounts management Slack channel to notify them of the new task.

https://www.workato.com/recipes/247761

The result is a much clearer handover process from Customer Success to Accounts Management teams, with about 20 minutes saved per accounts-related request. This is a huge productivity boost. Since Trello cards and notifications are automatically created with relevant information, Accounts Management agents can immediately handle the requests without having to refer to different apps for information.

Frequency of Duplicate Data Entry

80% of service professionals say they have to always, frequently or occasionally enter the same data into multiple applications to do their jobs. Numbers have been on the rise since 2015. As customer service systems become more complex, any new company applications– in Sales, Marketing and Service–can make service agents’ daily tasks more difficult.



IBM Bluewolf, 2016. 2016-2017 Annual Report: The State of Salesforce. [Graph] Sales’ Top Data Issues. Pages: 45.

Collaboration & Communication Between Multiple Departments

Syncing Customer Success in FreshDesk with Our Services Team in JIRA

When a ticket comes into FreshDesk from a customer asking for services, the Customer Success member who is assigned the FreshDesk ticket needs a quick and easy way to request a member of the Services Team in JIRA. Then, the Services Team needs to be automatically notified of the request. Without an integration between FreshDesk and JIRA, the Customer Success member has to manually alert the Services Team by pinging them in Slack or adding it to JIRA. This requires context switching, wastes time for both teams, and leaves room for error.

To make it easy for Customer Success reps to alert the services team of a new request, we started with the pre-built integration between Freshdesk and JIRA. This allows Customer Success to create an issue in JIRA with a click of a button inside of Freshdesk. The JIRA issue then gets assigned to a services personnel, who uses the Freshdesk Ticket to communicate with the customer. However, we soon found out that this pre-built integration had limitations and we needed more from our integration.

Here are the things we need our integration to do that the pre-built integration cannot handle:

- Show customer information in JIRA
  Important customer details like which Workato plan they are on and the priority status of the customer does not move from Freshdesk to JIRA using the prebuilt integration. Our Services Team needs this information available inside JIRA.

- Provide Alerts to the Services Team
  When someone is assigned to the issue on JIRA, no notification of the assignment is sent to Freshdesk and there are no notifications sent to the ticket owner. This makes it difficult to track and can lead to confusion for both teams and the customer.

- Automatically Change the Ticket Status
  When the Service Team Member who is assigned in JIRA has a question for the customer, a private note is added in Freshdesk, however we are unable to automatically change the ticket status so that the team member can immediately know that he needs to take action.

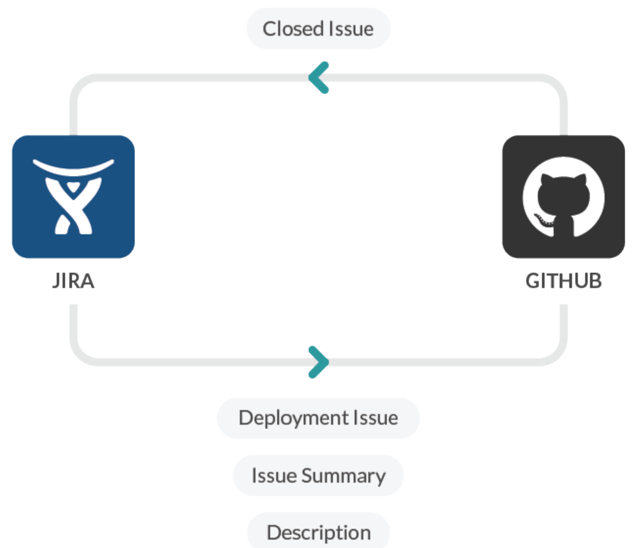
- Selectively send comments from Freshdesk to JIRA or from JIRA to Freshdesk
  You cannot selectively send comments from one app the the other with the pre-built integration. We need to selectively send comments to filter out some of the noise for our teams to keep them productive.

- Control for duplicates before creating the JIRA issue
  Duplicates are bad news for everyone. They cost astronomical amounts of time and money to fix and result in a worse experience for the customer. The pre-built integration cannot control for duplicates.

Workato can support all of the scenarios above and our recipes create a comprehensive bi-directional sync between JIRA and FreshDesk. These recipes work next to the pre-built integration to make communication between the Services Team and Customer Success Team seamless. For example, to make sure the Services Team is alerted to a new request, a Workato recipe will sync the customer information fields from the FreshDesk ticket to the new JIRA ticket that was created by the pre-built integration. When the JIRA ticket is updated, this triggers another Workato recipe which picks up the updates to the JIRA ticket and then updates the FreshDesk ticket status and automatically posts comments from either system whenever necessary. This keeps both systems in sync and makes it easy to reference the status of the project from either system. Automatic communication between Freshdesk and JIRA means a faster response time to customer requests, happier customers, and better data. It also gives the Customer Success Team a 360 degree view of the customer as all activity is automatically tracked in FreshDesk.

Collaboration & Communication Between Multiple Departments

Connecting Services to our Development Team with JIRA and Github



When the services team needs to create recipes or solve a problem for a customer that requires development work, these issues need to be created in Github for the product managers and developers in addition to JIRA, where the services team tracks issues. These issue tickets also must retain customer context such as SLAs and deadlines so they get scheduled accordingly.

In order to keep the Services and Engineering team in sync on issues and schedules, the Services team had to do double data entry in JIRA and Github. This is not only inefficient and tedious, but it increases the potential to lose important context along the way, meaning the Engineering team may need to keep an eye on both JIRA and Github simultaneously. Additionally, when developers complete their work on a customer related issue, the Services team member working with these customers needs to know that their corresponding JIRA issue has been resolved, so that they can get back to the customer, or to continue their work on the customer project.

To automatically move deployment issues from JIRA to Github a Workato recipe was created. The recipe triggers when an issue is created in JIRA with the label 'dev.' The recipe then retrieves key information on the issue such as the issue summary and description, as well as some custom fields and pushes the data into a new Github issue.

https://www.workato.com/recipes/334591

Another Workato recipe gets triggered when an issue is closed in Github. If this closed issue was synced from JIRA via the first recipe, thus corresponding to a JIRA issue, the recipe will add a comment to that JIRA issue to notify the Services team that the Github issue has been closed and development is completed.

https://www.workato.com/recipes/334592

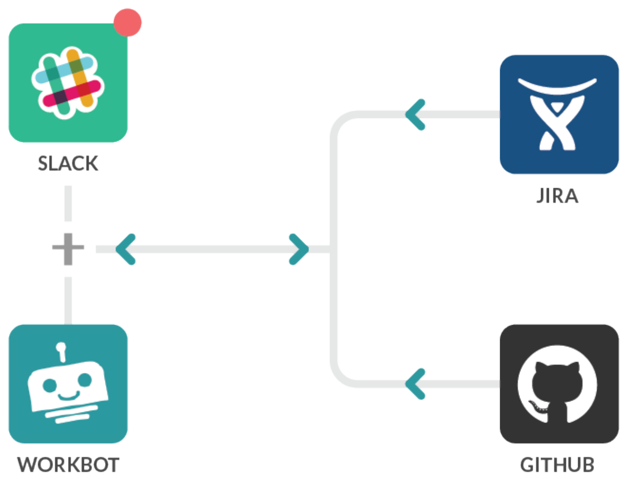
With these two Workato recipes, JIRA and Github communicate automatically thanks to Workato's bi-directional sync. Instead of having 2 different systems across the Services and Engineering team which requires double data entry or context switching between both systems, the Services team can focus on their projects knowing that their development related issues are being moved to Github automatically with all relevant information and are properly scheduled and resolved by the Engineering team. The Services Team member assigned to an issue will know when the dev issue is resolved right away, allowing for a faster implementation time for customers. As for the Engineering team, they never need to leave Github to notify the Services team or double check on information. This integration improves the productivity of both the Services and Engineering teams, and reduces licensing costs as only the specific team using the system needs access.

"When the status of a JIRA ticket is updated, it passes right back to our CRM. That way, everyone in client success is always informed of any enhancements we're making right in the CRM app."

CHERYL FELDMAN
SALESFORCE ADMIN
NAMELY

Collaboration & Communication Between Multiple Departments

Letting the Services Team Get Work Done from Slack



Workato uses Slack to communicate and collaborate with one another as there are two different offices and several remote workers. The Services Team has their own Slack Channel where service-related requests are posted called "Services." Within the channel, members of other teams may also request status updates of issues that are raised by the customers they are handling. To eliminate the need to leave Slack in order to get information from JIRA or Github, we use Workbot for Slack. This allows the team to get all the information they need and take actions from Slack.

For example the team needs to know when a JIRA issue is closed so that follow ups can be done, easily view a summary of JIRA issues during their weekly status meetings, and pull JIRA information into Slack while discussing or collaborating with the Customer Services team. To fulfill all of these needs, several recipes for Workbot for Slack were created.

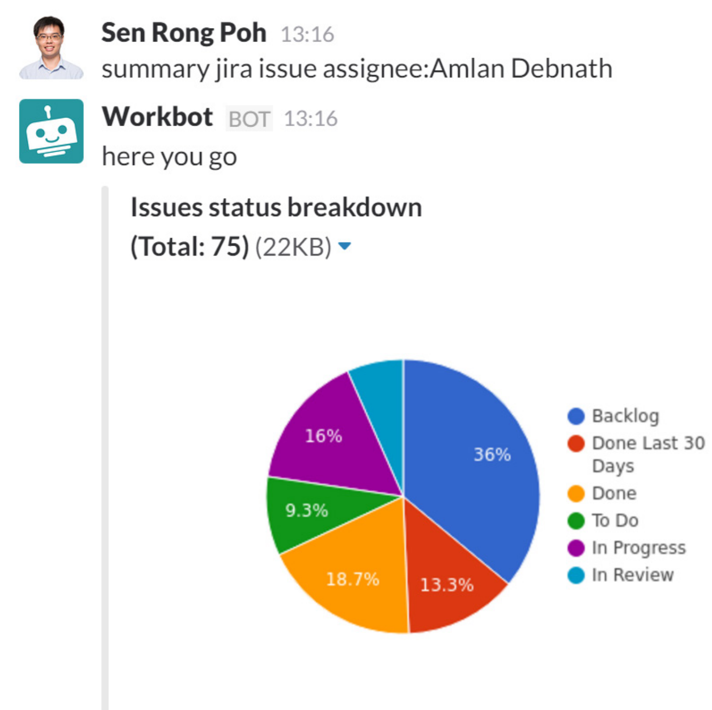
Closed JIRA Issue Posts to Slack Channel

To alert team members when a JIRA issue is closed so that follow ups can be done a recipe triggers when a JIRA issue is marked as resolved. The Workato recipe picks up the relevant information in the ticket and posts a notification via Workbot to a Slack channel. The notification post contains details such as the project, task and assignee. This provides an easy and contained place to see progress. The Customer Success team is also subscribed to this channel, meaning the Services team can inform the CS team about updates to their customers' projects in JIRA without having to actually contact the CS agent assigned in Freshdesk. https://www.workato.com/recipes/334616

Summary of JIRA issues in Slack

The Services team conducts weekly status meetings to keep everyone updated on the status of issues and evaluate the workload for each team member that week for future assignments. In these meetings, the main topic usually the status of each team member's assigned issues and how many of them have been completed. Getting the abstract data from JIRA in a quick and easily interpretable format right inside of Slack helps the team discuss these issues and see a holistic view of their assignments.

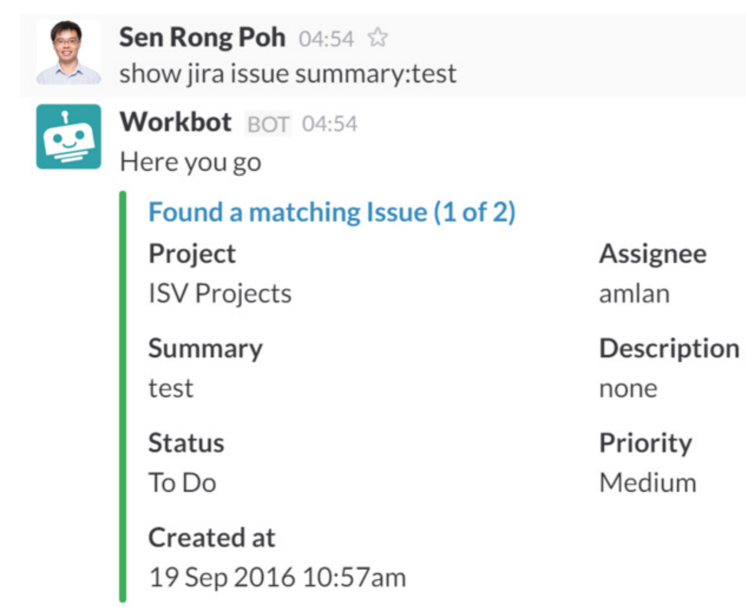
A Workbot recipe retrieves a count of issues in JIRA based on the assignee that was specified in the Workbot command triggering this recipe. It then takes this data and creates a pie chart right inside of Slack.



Showing JIRA and Github Issues Inside of Slack Chats on Command

The Customer Success team and Services Team often liaison in Slack. They often discuss issues of a specific client and need to access the information in JIRA regarding the issue. Workbot for Slack uses a recipe to bring all the data from the JIRA issue right into the Slack channel or private message when triggered by a command in Slack. This gives both teams a quick way to retrieve issue data without having to access JIRA in another window and lose context in the messaging thread.

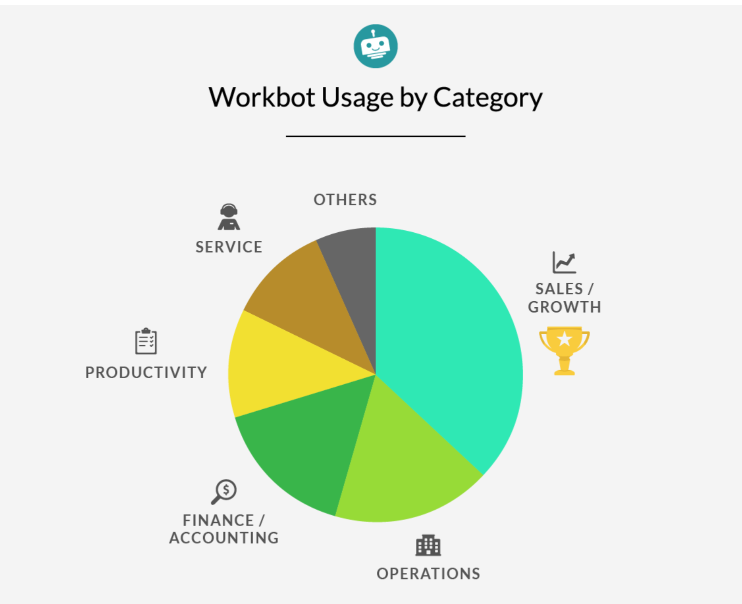
A Workbot recipe gets triggered when a user enters the command in Slack with the title of the issue in JIRA. It then goes into JIRA, retrieves key information on the issue such as the issue status, and displays it to the user requesting it.

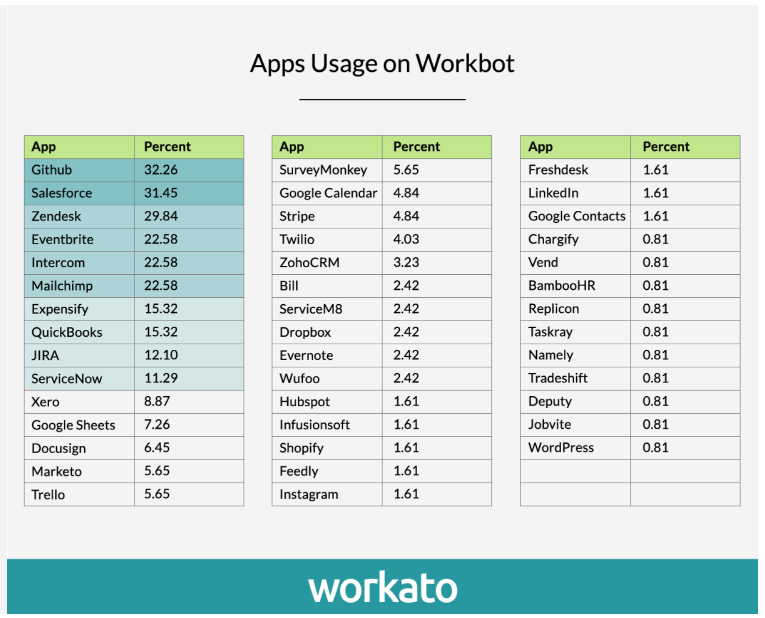


The Engineering team also discusses Github issues in Slack. Another Workbot recipe allows the user to list Github issues with a single command. This recipe allows the development team to quickly discuss issues that have been brought up by other team members in chat channels.

https://www.workato.com/recipes/284596

Instead of having to navigate out of Slack to Github or JIRA, search for the issue, and post it in Slack, it now takes 5 seconds for the user to retrieve an issue from JIRA or Github and view all relevant information. This saves everyone time and propels the discussion forward. All the Workbot for Slack recipes pull relevant information to the team without any effort on their part. This enhances Slack's use as a collaboration tool and closes the gap between various apps and the rest of the team.




Apps Usage on Workbot

App	Percent
Github	32.26
Salesforce	31.45
Zendesk	29.84
Eventbrite	22.58
Intercom	22.58
Mailchimp	22.58
Expensify	15.32
QuickBooks	15.32
JIRA	12.10
ServiceNow	11.29
Xero	8.87
Google Sheets	7.26
Docusign	6.45
Marketo	5.65
Trello	5.65

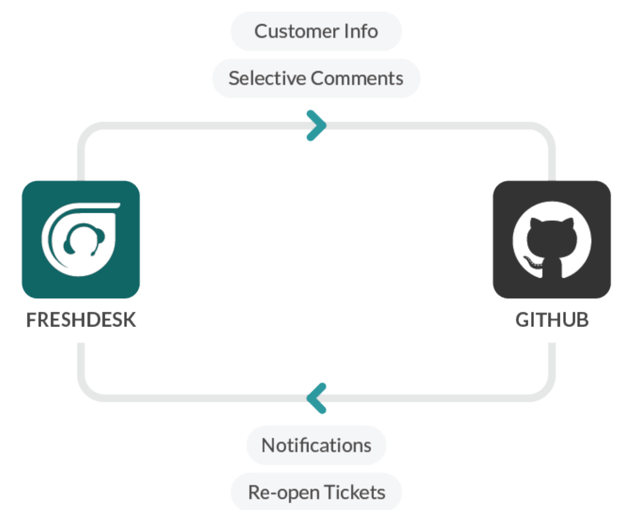
App	Percent
SurveyMonkey	5.65
Google Calendar	4.84
Stripe	4.84
Twilio	4.03
ZohoCRM	3.23
Bill	2.42
ServiceM8	2.42
Dropbox	2.42
Evernote	2.42
Wufoo	2.42
Hubspot	1.61
Infusionsoft	1.61
Shopify	1.61
Feedly	1.61
Instagram	1.61

App	Percent
Freshdesk	1.61
LinkedIn	1.61
Google Contacts	1.61
Chargify	0.81
Vend	0.81
BambooHR	0.81
Replicon	0.81
Taskray	0.81
Namely	0.81
Tradeshift	0.81
Deputy	0.81
Jobvite	0.81
WordPress	0.81

workato

Automating DevOps for Engineering

Auto-requesting product issues or enhancements in FreshDesk and notifying the Engineers in Github



Sometimes a customer will notice a problem with the site or wants to request an enhancement. When they report a bug or submit an enhancement request through our support portal, an issue has to be raised to the development team so they can build out the enhancement or fix the issue. The Development team tracks issues and requests through Github but FreshDesk is used as the main customer facing ticketing system. There is no easy way to create a Github Issue without leaving FreshDesk and logging into Github and Github doesn't allow for selective commenting, so as a quick fix, we use a prebuilt integration between FreshDesk and Github. Inside FreshDesk, agents can simply create an issue in Github with a click of a button to send the information to Engineering/Product team. The Github issue gets assigned to development team Personnel, who uses the FreshDesk Ticket to communicate with the customer.

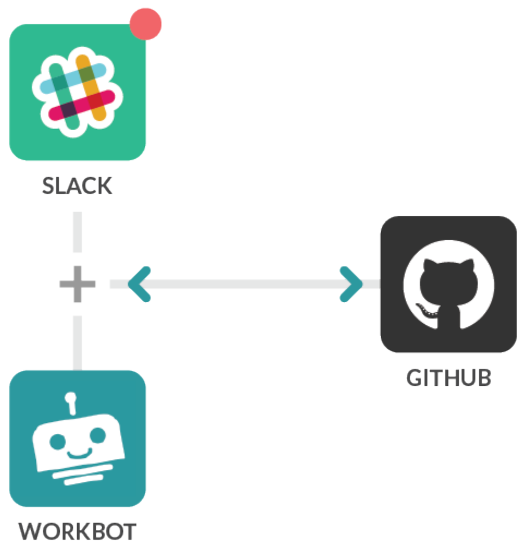
However, the pre-built integration does not allow us to:

- See customer information in Github
- Selectively send comments from Freshdesk to Github
- Send Notifications
- Comments from Github reopen Freshdesk tickets
- Control for duplicates before creating Github issues

Workato can support all of the scenarios above and creating a custom integration on Workato that will take care of these pain points is in the works. Making Github and FreshDesk fully communicate helps facilitate better communication between the development team and Customer Success team, as well as helping customers get results faster.

Automating DevOps for Engineering

Accessing Github Information in Slack Chat



Almost every other department like Customer Success, Marketing, Sales, and more needs to communicate with the dev team to report issues and build out new enhancements. While chatting in Slack, any team member may need to bring up issues to the development team or need to check the status of an issue, which are tracked in Github. Having a quick way to retrieve issue data without having to access Github in another window and lose context in the messaging thread would increase productivity for all departments, so we created a recipe to do this.

A Workbot recipe allows anyone to input a Github issue number in Slack during a conversation. Workbot goes into Github, retrieves key information on the issue such as the issue status, and displays it to the user requesting it.

https://www.workato.com/recipes/275074

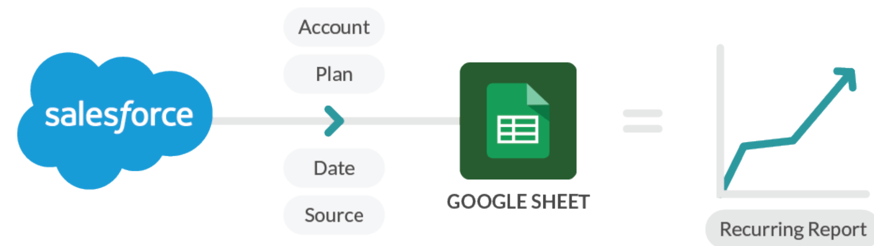
Another Workbot recipe allows the user to list Github issues with a single command. This list allows the development team to quickly discuss issues that have been brought up by other team members in chat channels.

https://www.workato.com/recipes/236135

Instead of having to navigate to Github and search for the issue, it now takes 5 seconds for the user to retrieve an issue from GIthub and get relevant information on it.

Auto-Recurring Reporting

Automating internal reports from Salesforce on Google Sheets



Workato Management requires weekly reports on different aspects of the company to keep track of how the company is progressing over time. Data needs to be retrieved from the many different applications that Workato uses and gathered in spreadsheets to be analyzed.

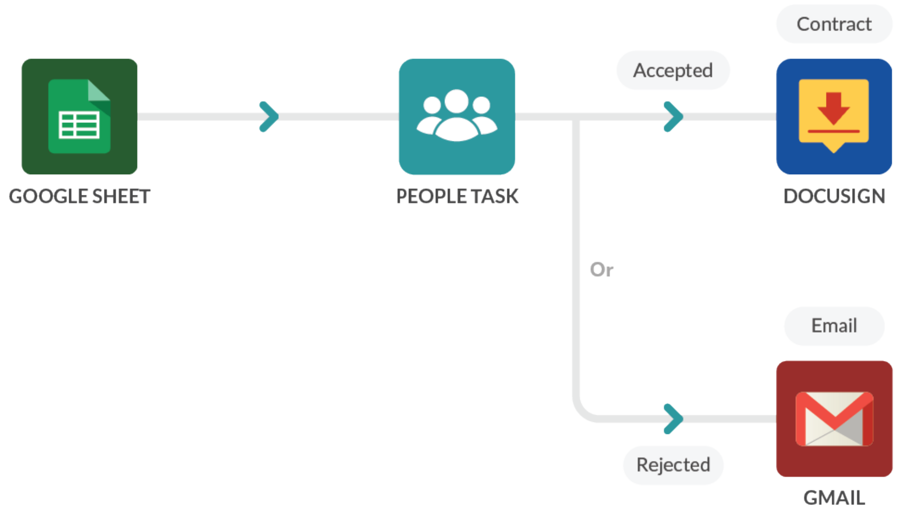
To automatically retrieve and manipulate data for reporting purposes without human intervention we created a recipe that retrieves data from Salesforce when an opportunity is marked as Closed Won in Salesforce (Closed Won means the customer has signed up for a paid plan). It then retrieves further details from Salesforce, such as the account name, and adds a new row in Google Sheets for analysis.

https://www.workato.com/recipes/271559

Instead of generating the report from Salesforce manually, which takes about 2 hours, the report is automatically updated with the latest information from Salesforce. Manual data entry errors are also completely eliminated using this recipe.

Mechanized Platform Partner On-Boarding

Triaging New Sign Ups and DocuSign Contract Deployment



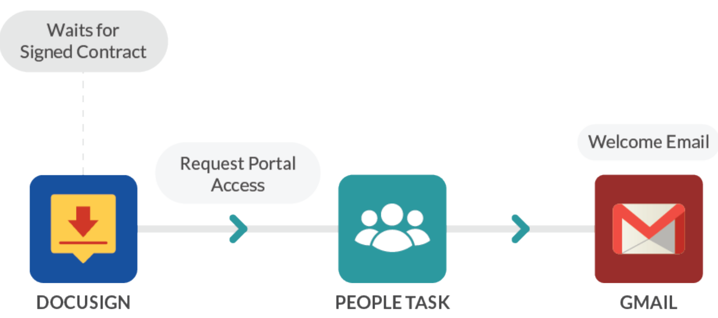
The Workato Partner Program is designed to give consultants all the tools they need to use Workato for their client's integration workflows. Members of the program have access to special partner webinars, newsletters, and a dashboard where they can control their client's recipes. As interest in the program grew, we needed a way to automate the signup process including an approval step done by a human. Our signup form on the website is a Google Form which sends the responses to Google Sheets, while our contracts are sent with DocuSign.

We created a recipe to automate the approval process using our special People Task app, which builds in a human workflow step into any automation. When a partner signs up on Google Forms, People Task brings the application submission from Google Sheets to an employee for approval by emailing a link. The employee can simply click the link, view the application, then click approve or reject. If the employee approves the application, the recipe will send a DocuSign contract that is populated with the correct information from the Google Sheet to the applicant for signature. If the employee rejects the application, an email will automatically be sent to the applicant asking for more information.

https://www.workato.com/recipes/97747

Mechanized Platform Partner On-Boarding

Automatic On-Boarding After Approval



When someone applies and is accepted for the Workato Partner Program, they need to sign a contract and then be granted access to our partner portal to view their dashboard. To automate the process after the contract has been signed, we needed another recipe that would wait for the signed contract to come back.

This recipe, when the DocuSign contract is signed, will populate a Google Sheets column which will trigger a Task asking a Workato employee to give the partner access to the portal. It will then send a welcome email to the approved partner automatically.

https://www.workato.com/recipes/97753

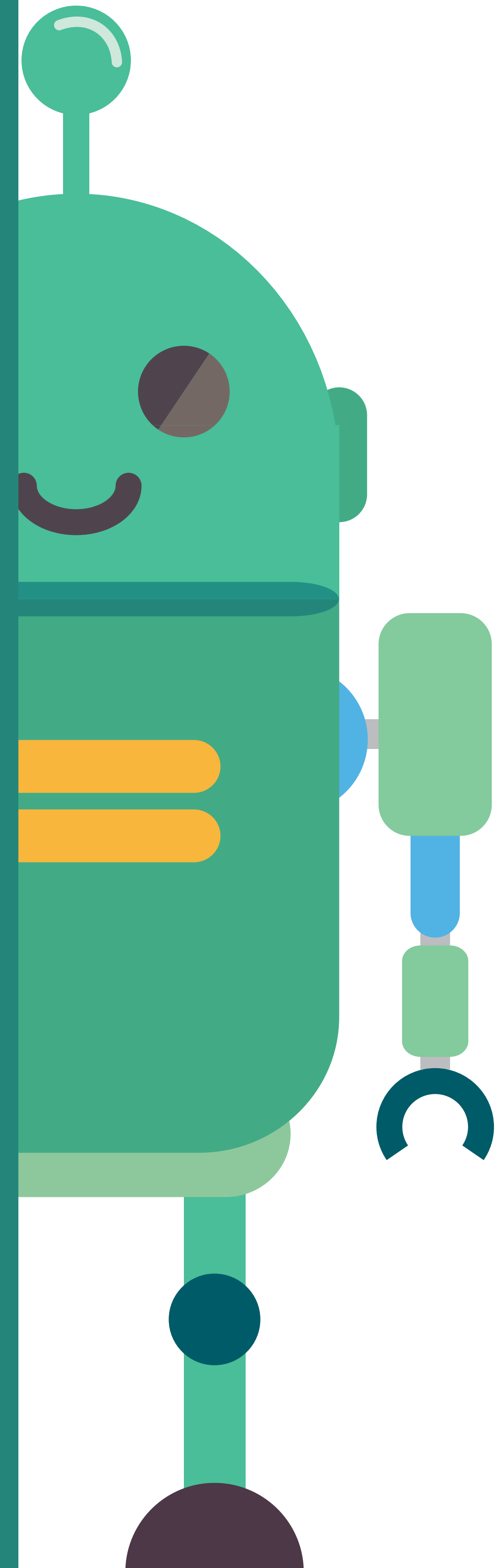
The full Partner Program process looks like this:

- When someone submits an application, the Workato Recipe immediately sends an employee a confirmation email with a task to approve the application.
- Once they approve the task, the Workato Recipe immediately sends this information to DocuSign, which sends out the template to the applicant with pre-populated data from the application form.
- If they reject the application the Workato Recipe will send the applicant a different email asking for further steps or more information.
- After an approved applicant has signed the contract, the second Workato Recipe will be triggered to send the employee a task to create an account to give the partner access to the Partner Management Portal. Once the account has been created, the Workato Recipe will then send a Welcome Email to the partner.

Not only is the process automated and therefore faster for everyone, but every action taken is automatically tracked in Google Sheets. This allows us to quickly add consultants to the program without taking much employee time to do so despite the fact that a human step is required to actually approve the application.

WHAT IS WORKATO'S WORKBOT FOR SLACK?

WORKBOT



Have you ever wished you could close a Zendesk ticket or update a Salesforce profile without manually logging into each app, finding the correct profile, and updating the proper information every time? Meet Workbot for Slack. You may have seen Workbot popping up throughout each chapter bringing us smart notifications or allowing our team to complete work inside of their apps from Slack.

Workato's Workbot for Slack is the first chat bot on the market that enables employees to access and command applications from within chat, shifting Slack from a listening platform to a doing platform as it takes commands and executes actions. Workbot for Slack even understands the chat context and makes recommendations to help your workflow go more smoothly than ever before. Here's a summary of the Workbot for Slack recipes we use every day to compliment our workflows and empower our employees.

View how Workbot works for us in the following chapters:

Customer Service
Partner Onboarding with QuickBase (page 16)

Marketing
Mixpanel Stats to Slack (page 35)

Sales
Key User Notifications from Salesforce (page 58)

BizOps
JIRA and Github for Services (page 74-76)
Github Issues into Slack (page 78)

Our Commitment

Businesses of all sizes and in all verticals are facing significant challenges to staying competitive and growing in a dynamic, fluctuating market, from customer expectations around powerful, always-on experience, to foundational technologies like cloud, mobile, AI, IoT and automation that are disrupting how products are created, delivered, bought and consumed. Efficiency and innovation are now baseline needs to survive and thrive.

At Workato, we experience all of this first hand. As our own business has rapidly grown we've hit new roadblocks, been required to change business processes, and leverage our own technology to stay on top of consumer needs. Throughout the process, we knew we needed to get two things right for our mission - creating a revolutionary product that breaks through the challenges of traditional integration products and assembling a world class team and operations to scale up and meet the demands of a growing market efficiently and with continual learning and improvement.

We hope you have enjoyed learning how we are using Workato internally to help transform our own company. We have done this by leveraging the power of some of amazing apps, over 90 of them and our own automations, over 95 of them, each working across multiple apps. It's easy for you to reuse or adapt any of our production recipes yourselves - join hundreds of customers that are doing exactly this. Box, for instance, has recently used one of our internal use cases to automate their entire partner onboarding process, leveraging similar automations we are had created to onboard our partners.

If one of these 95 recipes do not fit your needs, we have 150,000 other public recipes on Workato created by our customers that you can also reuse. With any one of these, you can get an automation going quickly, often in under an hour!

Much of the Workato team has been working with integration technologies longer than we care to admit (we in fact created the very first integration product). Integration projects have always been expensive, took months to complete and were technically complex. The level of productivity and time to value with integration projects that the Workato team has been able to make possible is unprecedented.

Reach out to us— my team and I are committed to help you transform your business.

Vijay Tella
ceo@workato.com
workato.com/HackyourDT

Businesses of all sizes and in all industries are facing challenges when it comes to staying competitive, getting in front of customer expectations around powerful, always-on experiences and in the emergence of multiple foundational technologies like cloud, mobile, AI, IoT and automation that are disrupting how products are created, delivered, bought and consumed.

In this book, we share how Workato has addressed these challenges to scale and transform our own business. We needed to get two things right - create a product that breaks through the complexities of traditional integration products and put together systems and processes that will help us execute on this mission. We admit that we've had an unfair advantage in our unfettered access to the perfect platform for digital transformation, Workato, and now we want to share our trials and errors with you. We use over 100 apps and Workato recipes to automate key business flows across all areas of our company from customer facing to HR and backend.

See how we did it and reuse our recipes, or any of the 150,000 other public recipes on Workato, to automate and transform your business.

"The efficiency that Workato automation is able to drive at Box is really powerful because Workato is such an easy tool to deploy and then modify and expand over time. Once we got the go ahead from our enterprise systems team, it was only 2 or 3 weeks to build the recipe and move it into production. It feels like it took us less time to automate the entire process with a Workato recipe than to onboard one partner manually!"

JULIEN BASSAN, BOX

"As a Salesforce Admin and manager, I believe Workato is life changing for admins! In Salesforce process builder admins can do automation without code in the platform. Workato is the extension of this mentality for integration. When I share my integrations at panels or tell other administrators about Workato, everyone is floored by how easily you can integrate without code."

CHERYL FELDMAN, NAMELY & SALESFORCE MVP

www.workato.com/HackyourDT