

Driving Growth with Automation + AI

Workato Proprietary and Confidential



Ops as a Revenue Generating Function

Workato Proprietary and Confidential



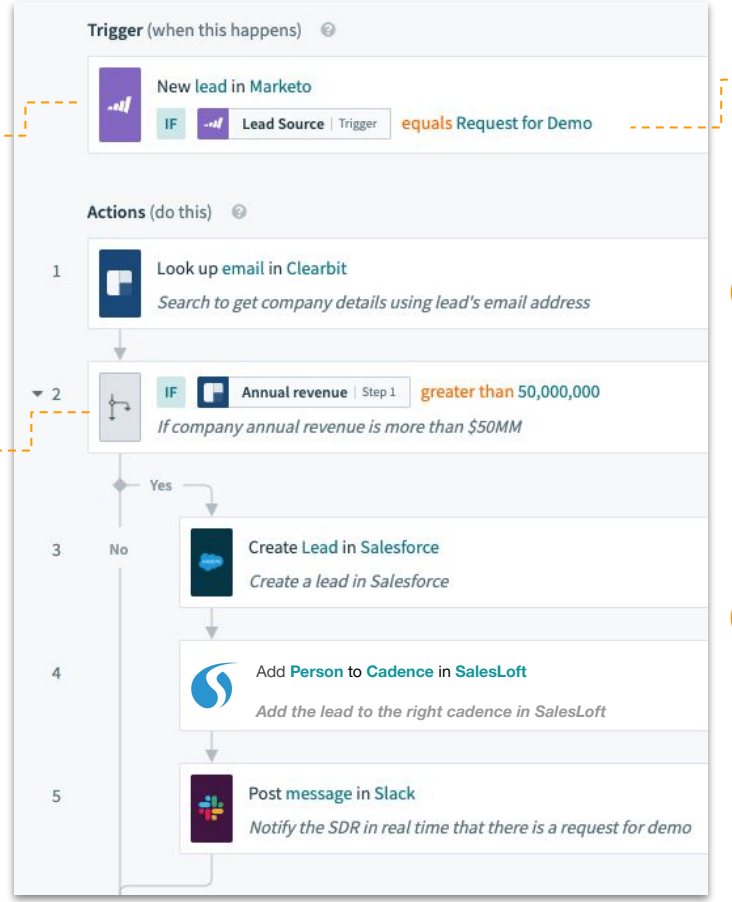
Art of the possible with AI in GTM

Workato Proprietary and Confidential

Build workflows vs buying silos

Event Based
Real Time | Scheduled | Batch

1



2

Smart Connectors
Auto-dedupe | In-Sequence Delivery | No data loss

3

Multi-App Workflows
400+ cloud apps | On-prem | SDK

Powerful Workflows
Linear | Branching | Looping | Try/catch | Error handling

4

5

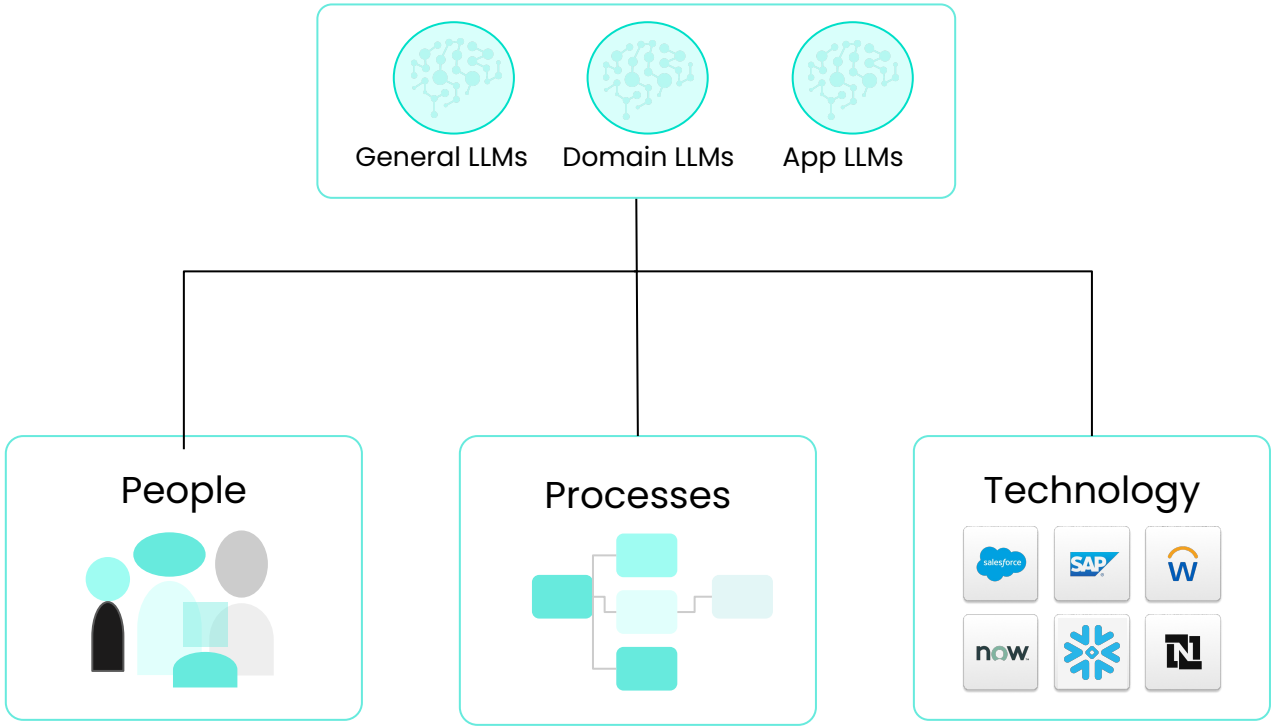
Low-code, Enterprise-grade
Community Recipe templates | Instant Deployment | Auto-scaling

Community
400k recipe templates | Meetups | Marketplace

6

workato | workato.com

How an AI Integrated GTM Team Works

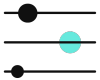


Democratize Gen AI in your organization

*"Having the chops to **leverage GenAI to create efficiencies within your workflow** is going to be a **critical skill set for the modern worker**."**



Empower more users/builders
Access, Copilots



AI in existing workflows
Revisiting old problems



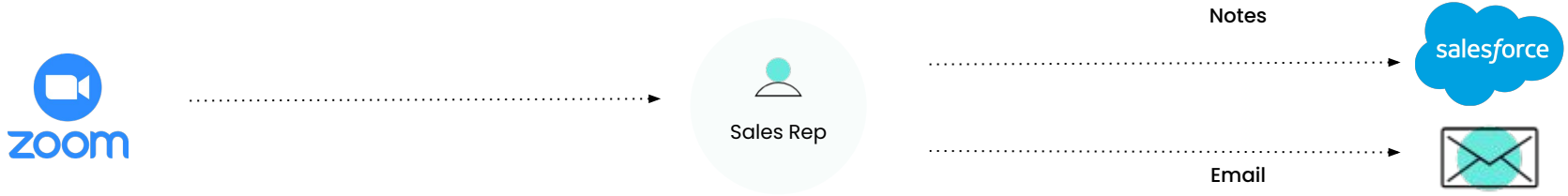
New uses cases
Limitless

* Source: Why AI skills will soon be critical for all jobs, not just tech jobs. Forbes, Nov 2023

GTM teams building workflows



Sales Process



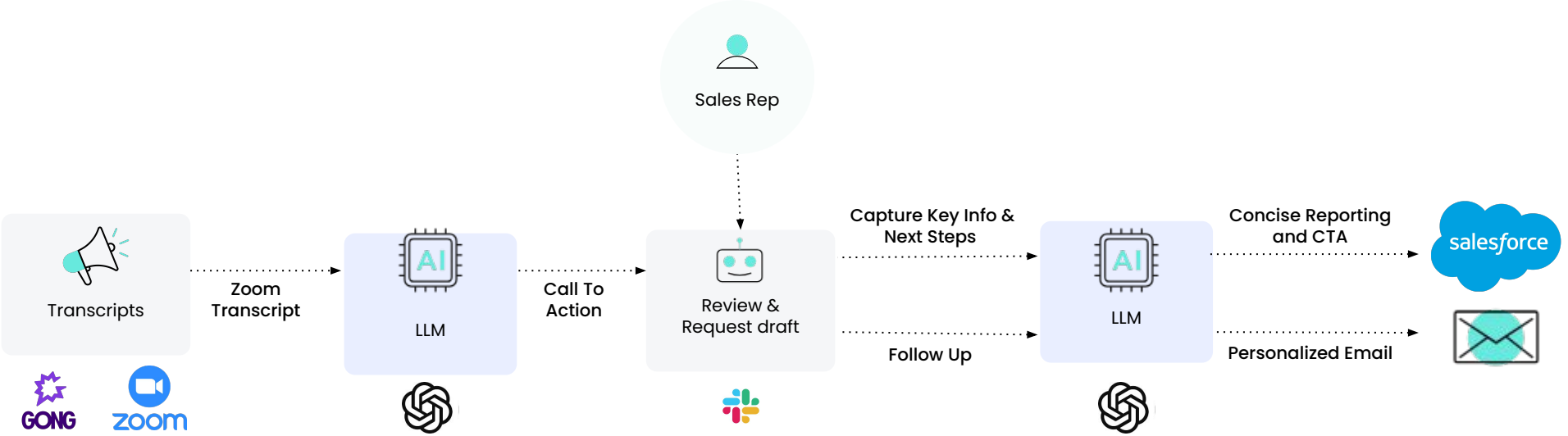
~11.2 hours average response time for follow up emails

Sellers have a love/hate relationship with Salesforce

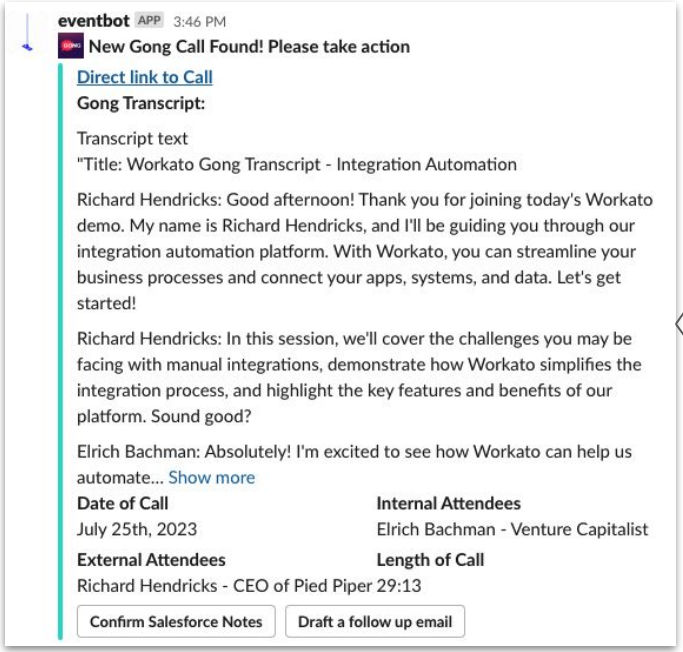
Less time for customer calls, working on deals

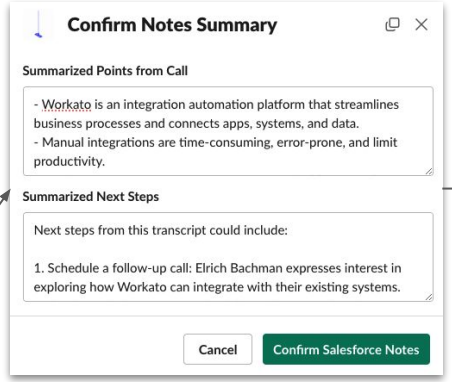
Longer deal cycles, lower pipeline conversion

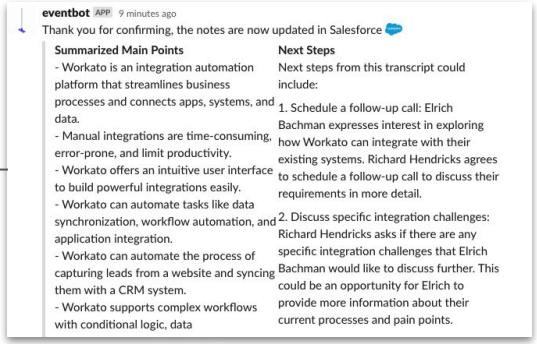
Sales Process with AI and Automation

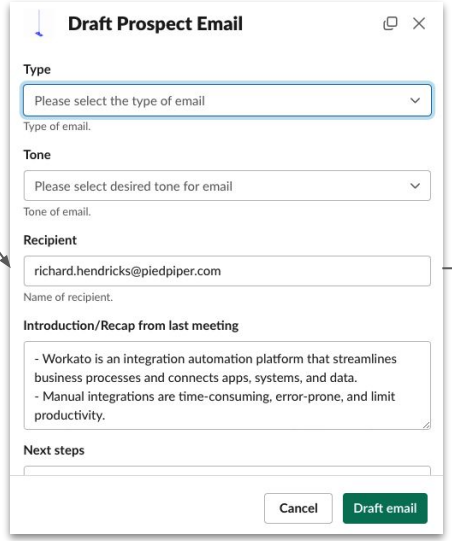


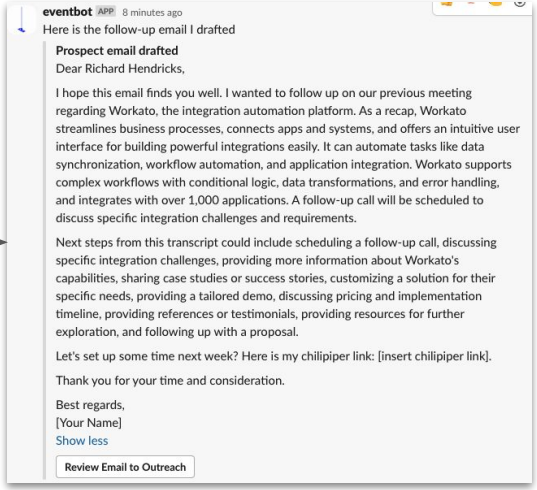
Gen AI Sales Assistant



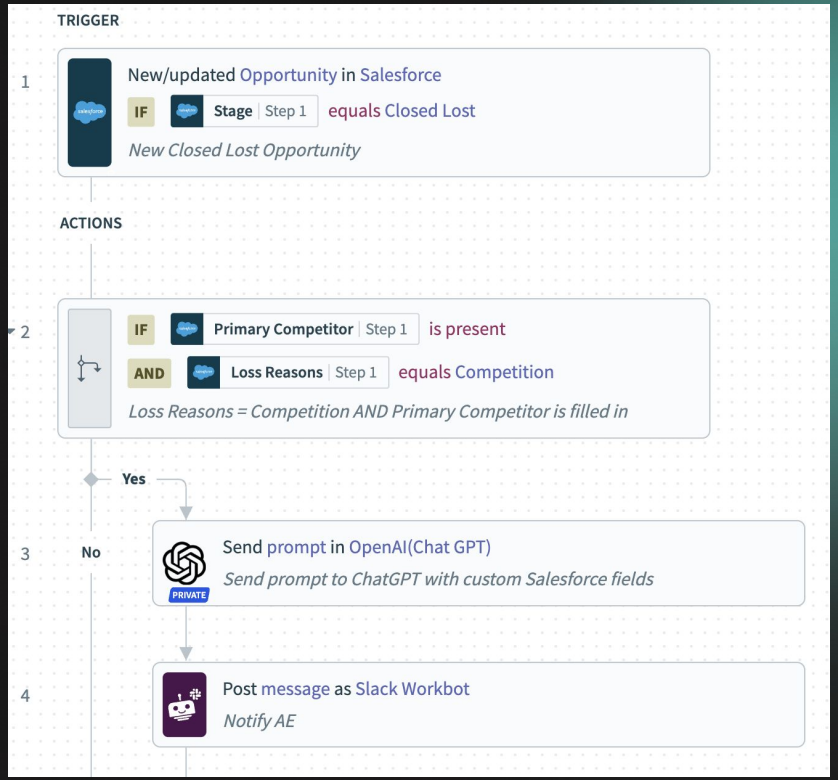








Reactivation reimagined with AI and Automation



- Customized business logic
  - Primary Competitors
  - Loss Reasons
  - Sales team segmentation
- Pulling data from Salesforce, Marketo, G2, product updates, upcoming events, recent reports like Gartner MQ, and more
- Slack notifications for AE's to customize and review
- Auto-generate sequences for SDR's, AE's
- Reach out around 8 months after loss anticipating their renewal

Workato Proprietary and Confidential

New Closed Lost Opportunity Attention: @Michael Fan

Link to Opportuntity
Email Drafted:

Dear [Prospect],

We understand why you chose needs and we wanted to reach out to see if there's anything we can do to re-engage in a conversation regarding our product, Workato.

Workato is a top-tier iPaaS platform that has been repeatedly recognized as a leader in the industry. As of 2023, we've been placed in the leader quadrant of Gartner's Magic Quadrant for Enterprise Integration Platform as a Service. Our platform provides a comprehensive automation solution, enabling organizations to operate more efficiently and eliminate legacy IT system silos.

What makes Workato unique is our simple cloud-based IDE—simplifying the development process for companies looking to deploy applications faster. Additionally, our patented Relational Function allows our users to connect across their suite of tools and technologies. Additionally, our enhanced security measures with continuous compliance support, makes Workato the best choice for EDI services.

We'd love to talk further about the advantages that Workato can provide and how we can exceed your expectations for EDI. We would be happy to arrange a call to further discuss this and answer any questions you have. We look forward to hearing from you
Show less

Closed Lost Date
August 31st, 2023

Primary Contact
Elrich Bachman - Venture Capitalist

Primary Competitor
ACME

Competitors
ZING

Confirm Email to Sequence

Sequence to Outreach

Owner

Michael Fan (you) Michael Fan

Assignee.

Input Sequence

1234

Confirm Email Recap

Dear [Prospect],

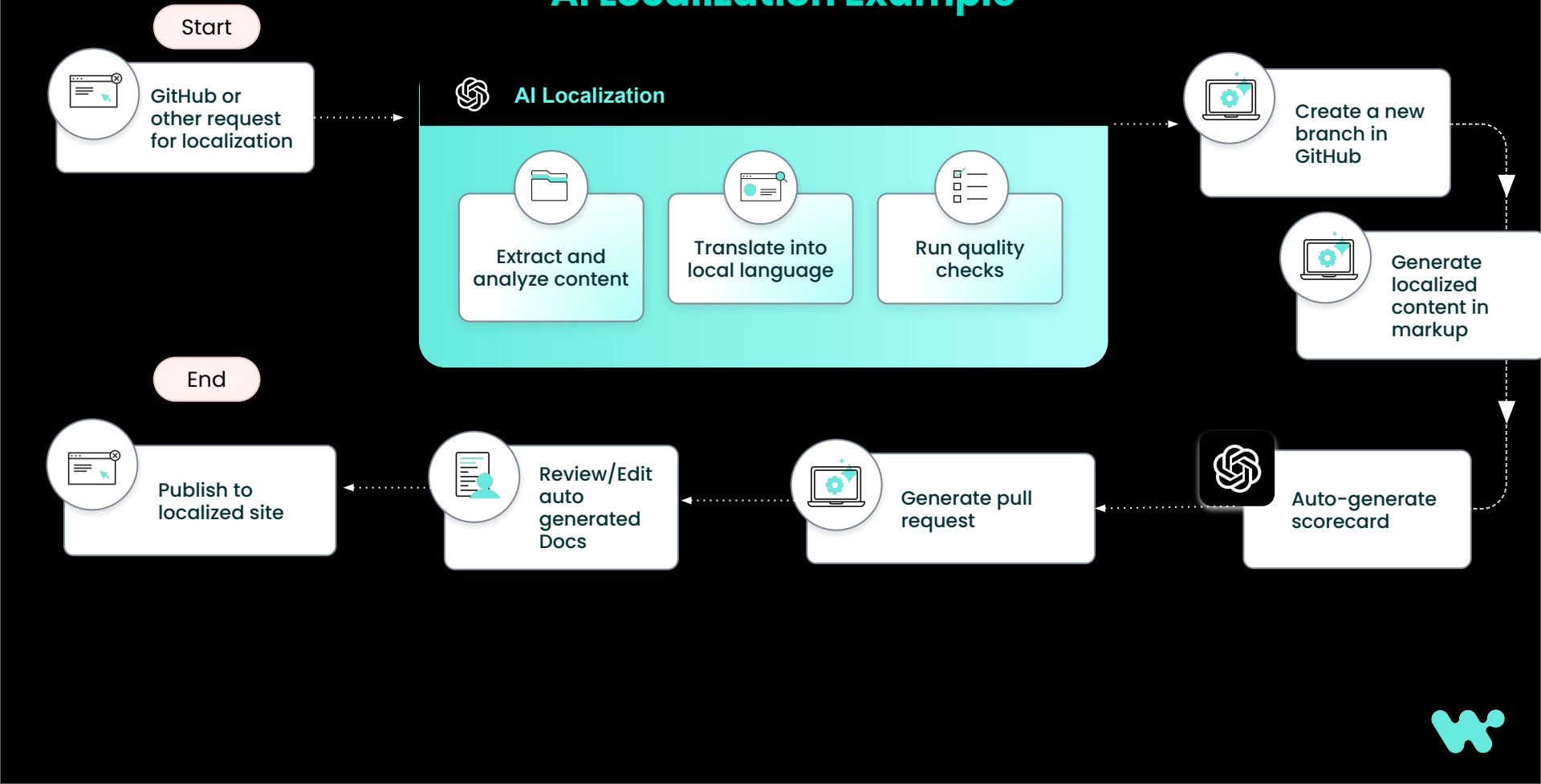
We understand why you chose Dell Boomi for your EDI needs and we wanted to reach out to see if there's anything we can do to re-engage in a conversation regarding our product, Workato.

Workato is a top-tier iPaaS platform that has been repeatedly recognized as a leader in the industry. As of 2023, we've been placed in the leader quadrant of Gartner's Magic Quadrant for Enterprise Integration Platform as a Service. Our platform provides a comprehensive automation solution, enabling organizations to operate more efficiently and eliminate legacy IT system silos.

Close Submit

Workato Proprietary and Confidential

AI Localization Example



AI Recruiter Example





Rishi Mallik

SVP, Marketing

Linkedin.com/in/rishimallik/

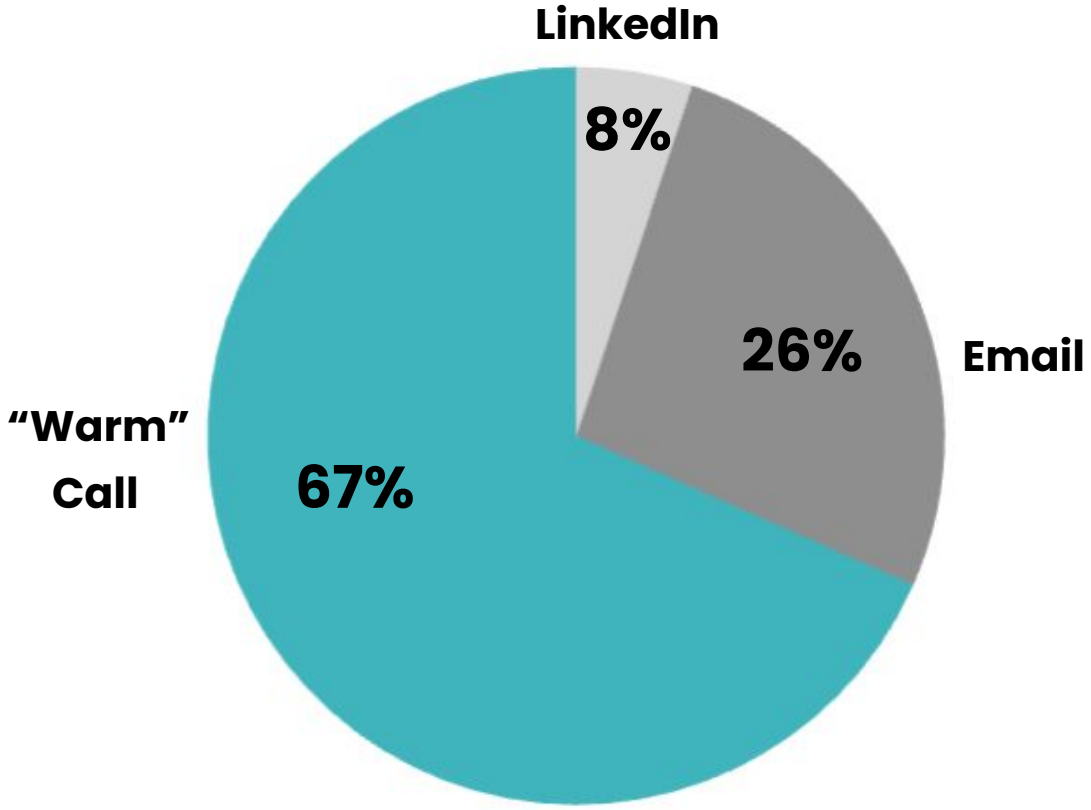
rishi@workato.com



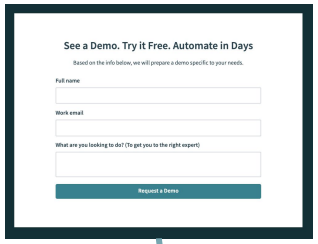
Appendix

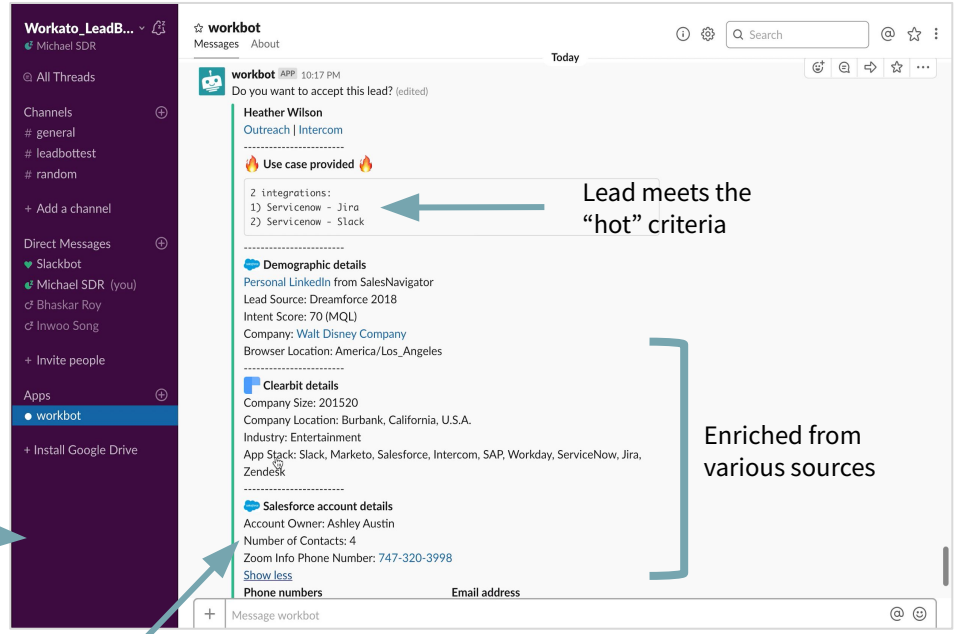
New Logo Meetings Booked by Source

US FY24
Up from 54%



Easily build a lead routing bot w/o buying apps

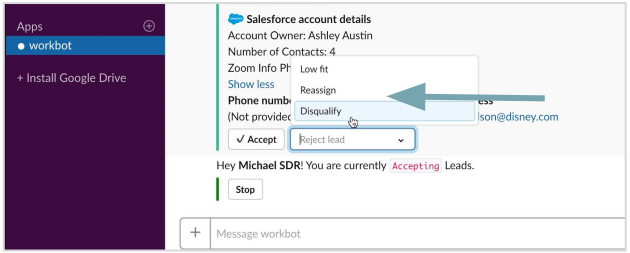




Lead meets the "hot" criteria

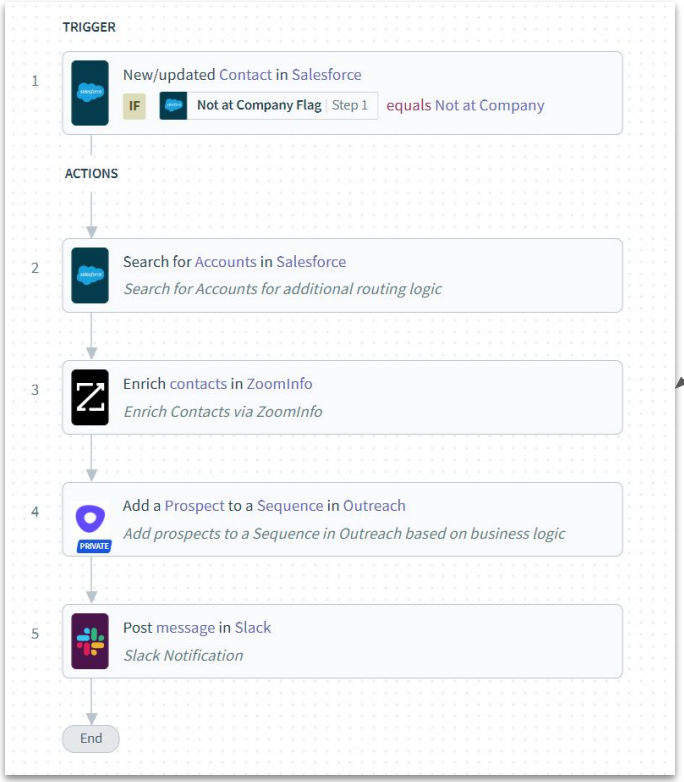
Enriched from various sources

Is there an active opportunity?



Take action without leaving Slack

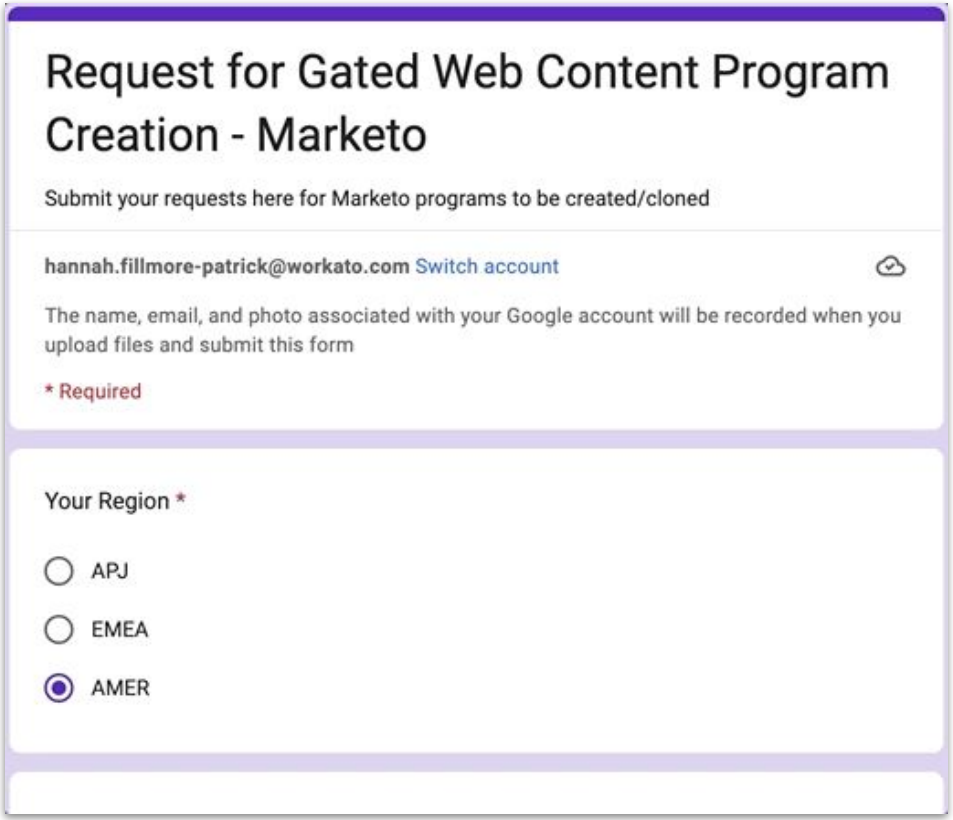
Automated Outreach for previous buyers that changed jobs



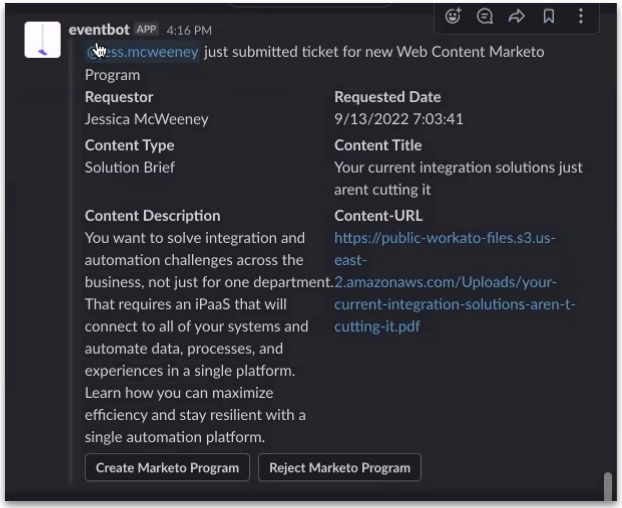
Workflow

- LinkedIn Sales Nav updates Salesforce of job change
- Search Accounts in Salesforce for business routing
- **Enrich contacts for new business email, and title**
- Sequence the lead into Outreach
- Post Slack Notification to SDR

Automated Campaign Launcher



- Fill out a form to to self-serve campaigns
- Automated program and asset creation with proper token mapping
- Auto creates all campaigns, and sends slack confirmation



Link to blog post

Prompt Engineering

workato

