



GTM Automation Meetup

Workato on Workato



Box & Workato

July 2023

Introduction

- Who I am
- Automation matters – *150 in 2011 providers to over 9000 companies*
- Workato @ Box
 - *ES/IT/SOPs*
 - *Marketing Ops*

Workato Use Cases

Use Cases

List Validation Process

- Validate against mandatory fields
- Country
- Employee Size

Highlights & Results

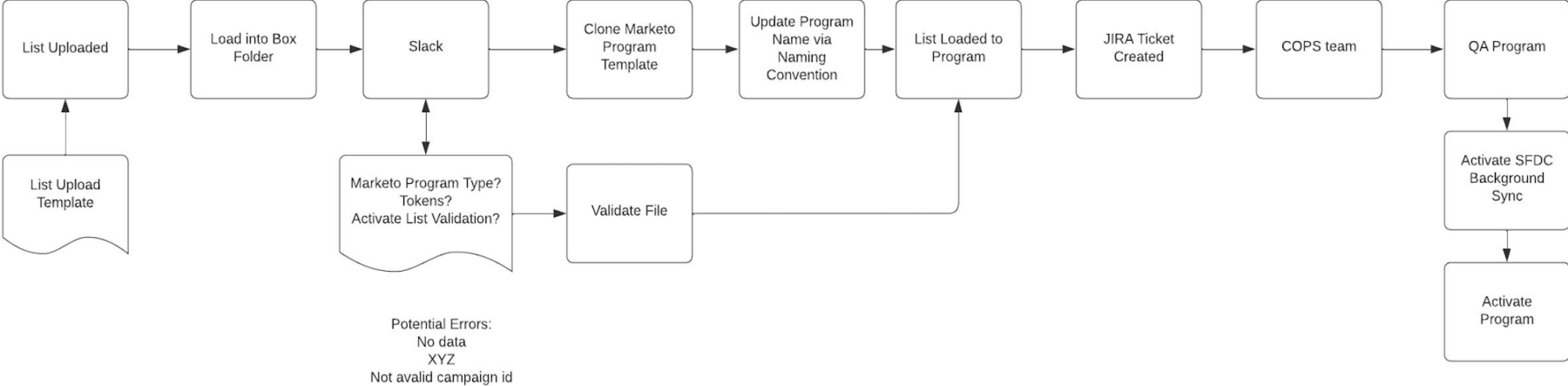
1. Cut list upload process time down by 50% - *Enabling sales to follow up faster*
2. Took errors in lead flow down to almost 0% (from list uploads) - *Minimizing the need for trouble shooting, faster lead flow time*

List Upload Automation – Launching soon!

- End to end automation
- Integration with Slack, Jira, Marketo & Box
- Notify MOPs team for QA & launch

1. Total List upload time will drop to ~ 2 hours from 2 business days
2. Free up a resource
3. Enable Marketing to load their own lists
4. Faster lead flow & follow up

List Upload Automation



Takeaways

- If you can imagine it, automate it!
- Partner with your Workato team
 - *On-site working sessions*
 - *Great resource for what other companies are doing*

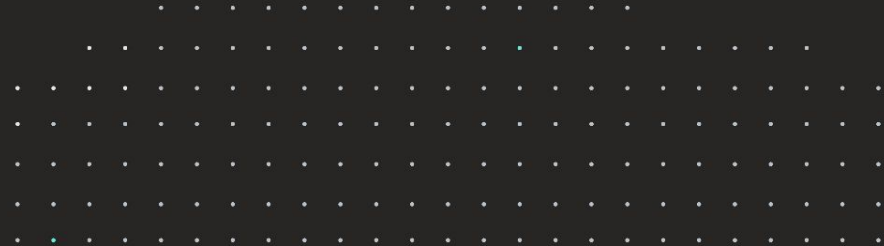


Michael Fan

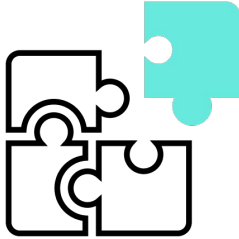
Sr. Manager, Marketing Ops & Growth

[Linkedin.com/in/fan-michael](https://www.linkedin.com/in/fan-michael)

michael.fan@workato.com



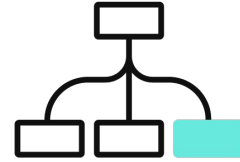
MOps as a Revenue Function vs. Support Function



**Internal & Institutional
Knowledge**



**Buy-in & Autonomy from
Leadership**



**iPaaS Tool &
Curiosity/Innovation**

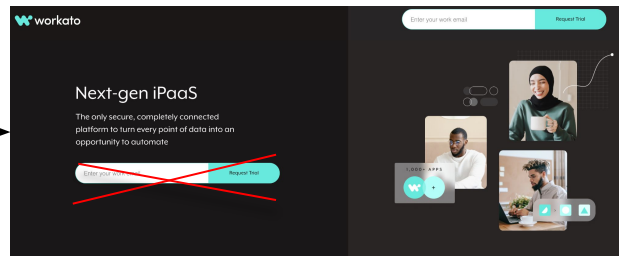
Google Interesting Moments

Google Interesting Moments Campaign



integration software|
integration software - Google Search

Existing Person in Marketo searches a keyword, and clicks on an ad we bid on in Google Ads



Hits Landing page, but does not fill out form

Subject {{custom21}}

Hi {{first_name}},

I saw that you've recently had some interest around {{custom21}}.

We help companies like Visa, Pixar and Slack increase productivity and agility by building custom integrations and automating key business processes across all their apps without code, allowing them to focus on business strategy and solving more complex problems.

We'd love the opportunity to discuss your needs in-depth and set you up with a free trial. Are you available sometime this week or next for an introductory call?

Best,
{{sender.first_name}}

Google Interesting Moments Campaign

Integration software

Hi Tolga,

I saw that you've recently had some interest around Integration software.

We help companies like Visa, Pixar and Slack increase productivity and agility by building custom integrations and automating key business processes across all their apps without code, allowing them to focus on business strategy and solving more complex problems.

We'd love the opportunity to discuss your needs in-depth and set you up with a free trial. Are you available sometime this week or next for an introductory call?

Best,
Chandon



*Automate the w*ork out of everything*

Chandon Camillo | Business Systems Automation Advisor | 609.285.6711 | [LinkedIn](#)

If you'd like me to stop sending you emails, please [click here](#)

Bamboohr connector

Hi There,

I saw that you've recently had some interest around Bamboohr connector.

We help companies like Visa, Pixar and Slack increase productivity and agility by building custom integrations and automating key business processes across all their apps without code, allowing them to focus on business strategy and solving more complex problems.

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Chandon



*Automate the w*ork out of everything*

Chandon Camillo | Business Systems Automation Advisor | 609.285.6711 | [LinkedIn](#)

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Re: Integration software

Hello,

How about meeting this Friday - in the afternoon?
I'm in Central Time.

Best,
Tolga Demirsar

RE: Bamboohr connector

Hi Chandon,

Thank you for your email. I can connect next Monday between 10am-12pm PST or Tuesday between 2pm-4:30pm PST. Let me know if any of these work for you.

Thank you,

Google Interesting Moments Campaign *Previous FY

68%

Open Rate

30%

Reply Rate

59

Meetings

34

Opportunities

\$2M

Pipeline


\$250k

Revenue
Will continue to grow

OpenAI + Gong

OpenAI Salesforce Notes Summarization

OpenAI Salesforce Notes Population

 New Gong Call Found! Please confirm summary to update Salesforce

[Direct link to Call](#)

Gong Transcript:

Transcript text

"Title: Workato Gong Transcript - Integration Automation

[Opening]

Sales Rep: Good afternoon! Thank you for joining today's Workato demo. My name is [Sales Rep Name], and I'll be guiding you through our integration automation platform.

With Workato, you can streamline your business processes and connect your apps, systems, and data. Let's get started!

[Agenda]

Sales Rep: In this session, we'll cover the challenges you may be facing with manual integrations, demonstrate how Workato simplifies the integration process, and highlight the key features and benefits of our platform. Sound good?

Prospect: Absolutely! I'm excited to see how Workato can help us automate our...

[Show more](#)

Date of Call

May 11th, 2023

External Attendees

bhaskar@open.ai - CMO

Internal Attendees

michael.fan@workato.com - Marketing Ops

Length of Call

39:23

Confirm Salesforce Notes

Confirm Notes Summary

Summarized Points from Call

Summary Points:

- Challenges with manual integrations can limit productivity
- [Workato](#) simplifies integration process with intuitive user interface
- Automate tasks like data synchronization, workflow automation and application integration
- Supports complex workflows with conditional logic, data transformations, and error handling
- Integrates with over 1,000 applications, including popular CRM, marketing, and finance systems

Summarized Next Steps

Next Steps:


1. Schedule a follow-up call with the prospect to discuss integration requirements in more detail.
2. Demonstrate how [Workato](#) can integrate with prospect's existing systems.
3. Answer any additional questions the prospect may have about [Workato](#).
4. Highlight the key features and benefits of [Workato's](#)

Cancel

Confirm Salesforce Notes

OpenAI Email Follow Up

OpenAI First Email Follow-Up

 **Copilot Wizard** APP 3:49 PM
New Gong Call Found! OpenAI - New Logo - 2023/8/19

[Direct link to Call](#)

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[Show more](#)




Date of Call
May 11th, 2023


Internal Attendees
michael.fan@workato.com - Marketing Ops
karuna.mukherjea@workato.com - VP of Enterprise Marketing
michelle.ng@workato.com - Director of Enterprise PMM
stephanie.liu@workato.com - Sr. Product Marketing Manager


External Attendees
bhaskar@open.ai - CMO

Length of Call
39:23

 1 reply Today at 3:50 PM

 **Draft Prospect Email**  

Type
 
Type of email.

Tone
 
Tone of email.

Recipient

Name of recipient.

Introduction/Recap from last meeting

Next steps

OpenAI First Email Follow-Up



Copilot Wizard APP 2 months ago

Here is the follow-up email I drafted

Prospect email drafted

Dear Bhaskar,

I hope you are doing well. I wanted to follow up from our last meeting and thank you for your interest in exploring how Workato can integrate with your existing systems.

Our last conversation covered a few key points. Workato is an integration automation platform that simplifies the integration process and provides automated recipes for data synchronization, workflow automation, and application integration. Our robust features allow users to create complex workflows, transform data, and handle errors. We also offer over 5,000 applications to integrate with.

Given your interest in Workato, it would be great to discuss your specific requirements in more detail. I'm available to provide more information and assistance for your research. Additionally, I can provide more demos or case studies to demonstrate the features and benefits of the platform. Let's set up some time next week? My chilipiper link is <https://workato.chilipiper.com/book/me/michael-fan>.

Thank you for considering Workato. I'm looking forward to our next call!

Best regards,

Michael

[Show less](#)

Sequence to Outreach



Copilot Wizard APP < 1 minute ago

[Outreach](#) Successfully sequenced under ID: 9820

Link to Outreach Sequence

<https://app1f.outreach.io/sequences/9820>

Thank you!

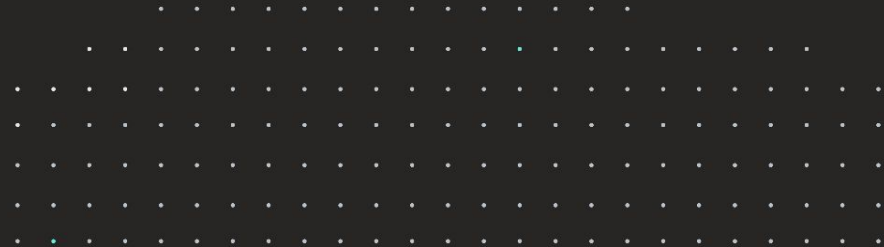


Josh Lucas

Head of GTM Automation Solutions

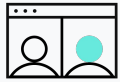
[Linkedin.com/in/joshlucas19](https://www.linkedin.com/in/joshlucas19)

joshua.lucas@workato.com



GTM Automation Assessments

Process



Executive kickoff

Workato RevOps experts kick off with department execs and ops leads to align your business objectives to high impact automation opportunities.



Process mapping

Use case deep dives with process leads and technical owners. Your Workato expert will help map out current vs. future state process maps with the associated impact of automation.



Education & execution

Product enablement and training with dedicated Workato support for each project team to learn Workato while implementing top priority automations.



Findings & recommendations

Regroup with exec sponsors to present initial success and plans for continued implementation of automation strategy relating to stated business objectives.

Outputs

Process maps documenting end-to-end workflows of current vs ideal future states

Scoring rubric for focus areas with projects identified for continued improvement

Automation roadmap detailing future projects identified during the assessment

Attendees

Execs & Dept Leaders

Ops Teams & Builders

Leaders & Ops

Discover the new automation mindset
at the #1 automation conference.

2023



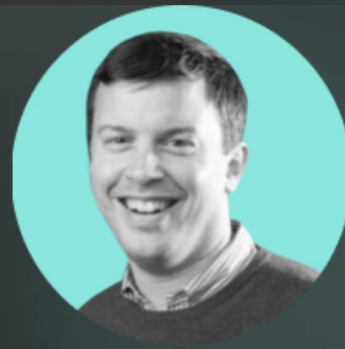
FEATURED SPEAKERS



Hillary Carpio
Sr. Director, ABM



SCOTT BRINKER
VP of Platform Ecosystem



STEFANO MAZZALAI
Sr. Manager of Marketing Operations





AUTOMATE

Discover the new automation mindset
at the #1 automation conference.

2023

IN-PERSON ANNUAL CONFERENCE

August 30th-31st

Location:

Computer History Museum in Mountain View

Register with the code

{{Systematic-July}}

for FREE tickets



- **3-day Event:**
 - Day 0: Certification training + Marketing Process Automation
 - Day 1 and 2: Full Day Conference
- Get Automation Pro certified from live instructor-led training
- Tracks featuring customers in IT, Product, and Line of Business (HR, Finance, GTM).
- Keynotes from industry experts and thought leaders
- The New Automation Mindset Premier book launch
- Hands-on workshops for a variety of use cases