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

List Upload Automation – Launching soon!

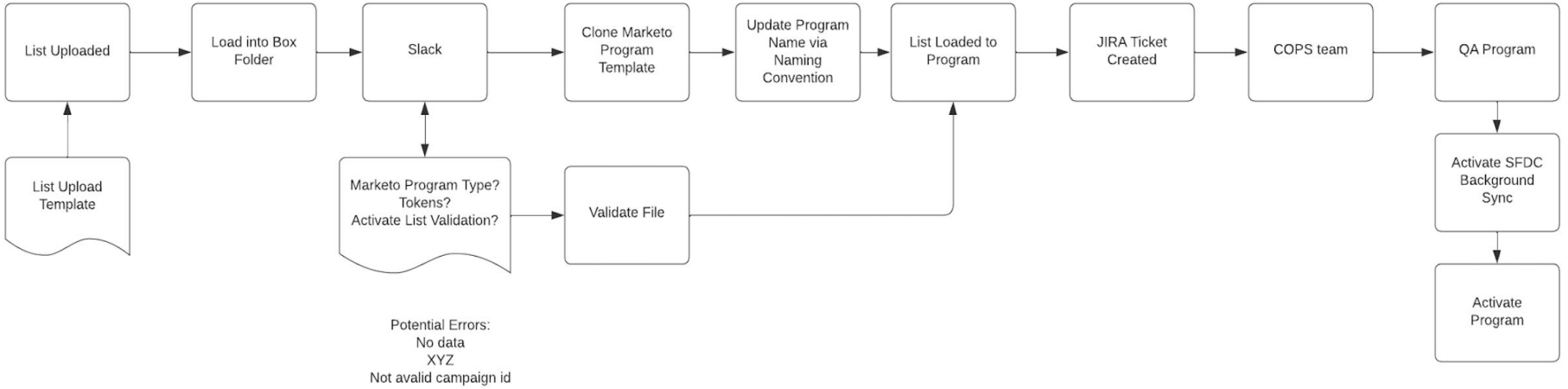
- End to end automation
- Integration with Slack, Jira, Marketo & Box
- Notify MOPs team for QA & launch

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*

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*

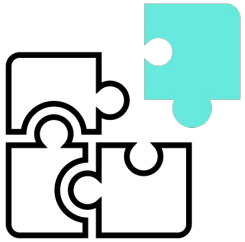
Michael Fan

Sr. Manager, Marketing Ops & Growth

Linkedin.com/in/fan-michael

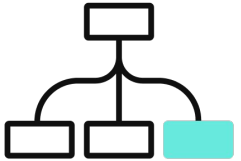
michael.fan@workato.com

MOps as a Revenue Function vs. Support Function



Internal & Institutional Knowledge

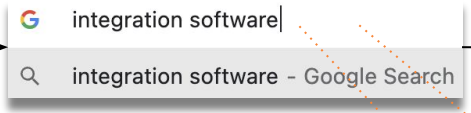
Buy-in & Autonomy from Leadership



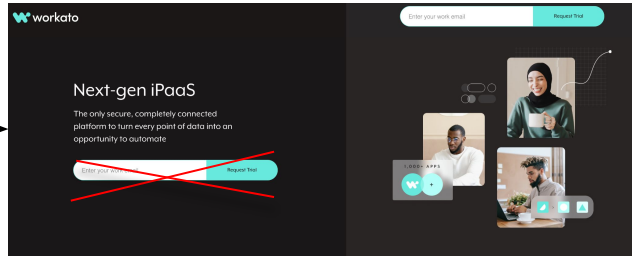
iPaaS Tool & Curiosity/Innovation

Google Interesting Moments

Google Interesting Moments Campaign



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}}

Auto sequence the exact keyword into the Outreach Sequence

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

workato
*Automate the w*ork out of everything*
Chandon Camillo I Business Systems Automation Advisor I 609.285.6711 I 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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Best,
Chandon

workato
*Automate the w*ork out of everything*
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If you'd like me to stop sending you emails, please click here

Re: Integration software

Hello,

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

Best,
Tolga Demirsar

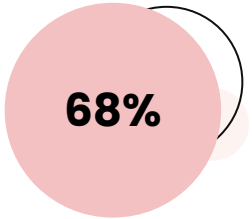
RE: Bamboohr connector

Hi Chandon,

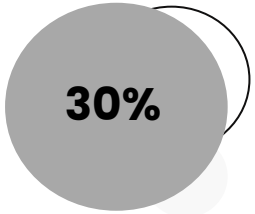
Thank you for your email. I can connect next Monday between 10am-12pm PST or Tuesday between 2pm-4:30pm PST. Let me know if any of these work for you.

Thank you,

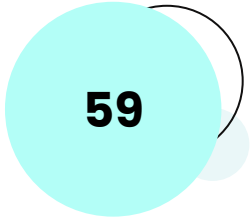
Google Interesting Moments Campaign *Previous FY



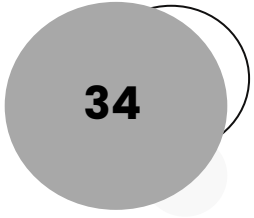
Open Rate



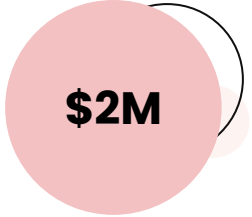
Reply Rate



Meetings



Opportunities



Pipeline

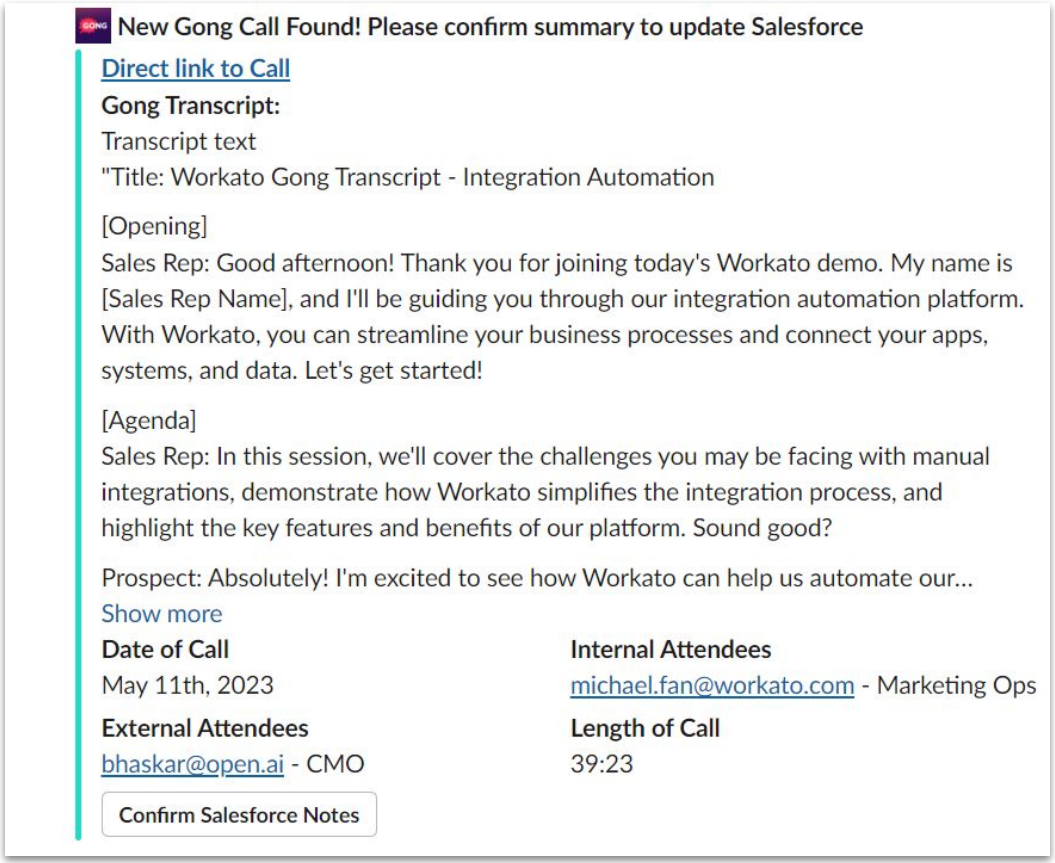
Revenue

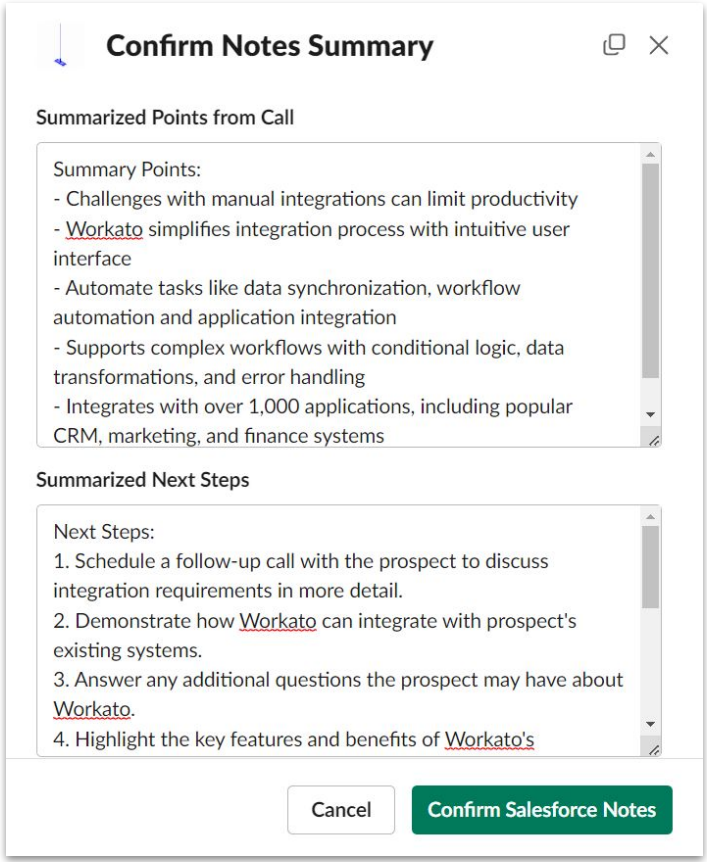
Will continue to grow

OpenAI + Gong

OpenAI Salesforce Notes Summarization

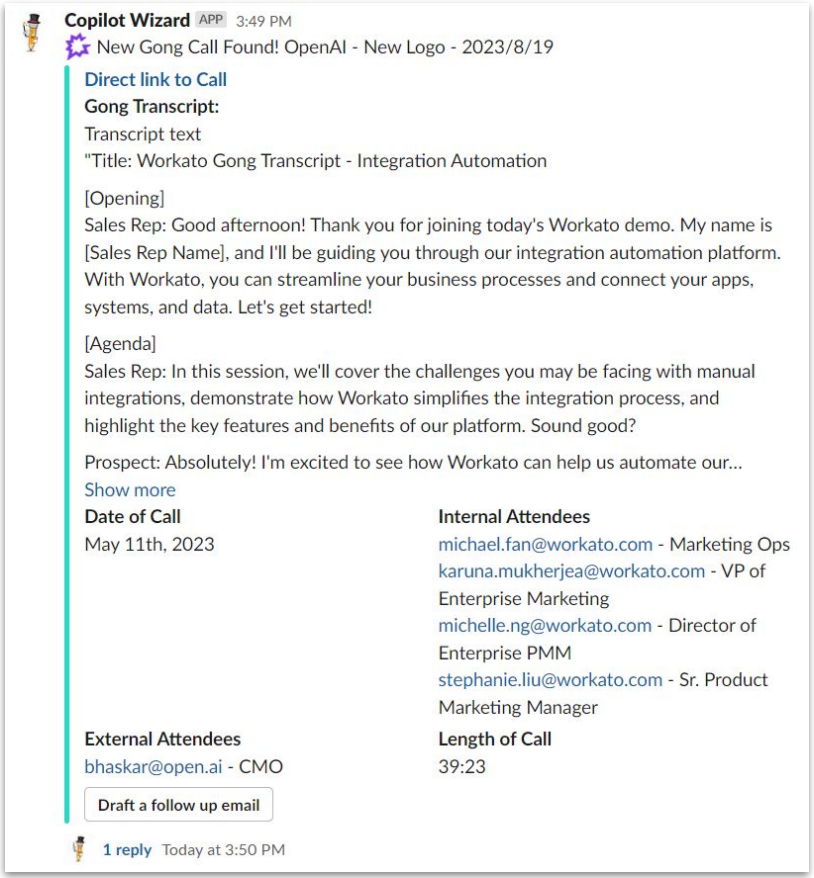
OpenAI Salesforce Notes Population

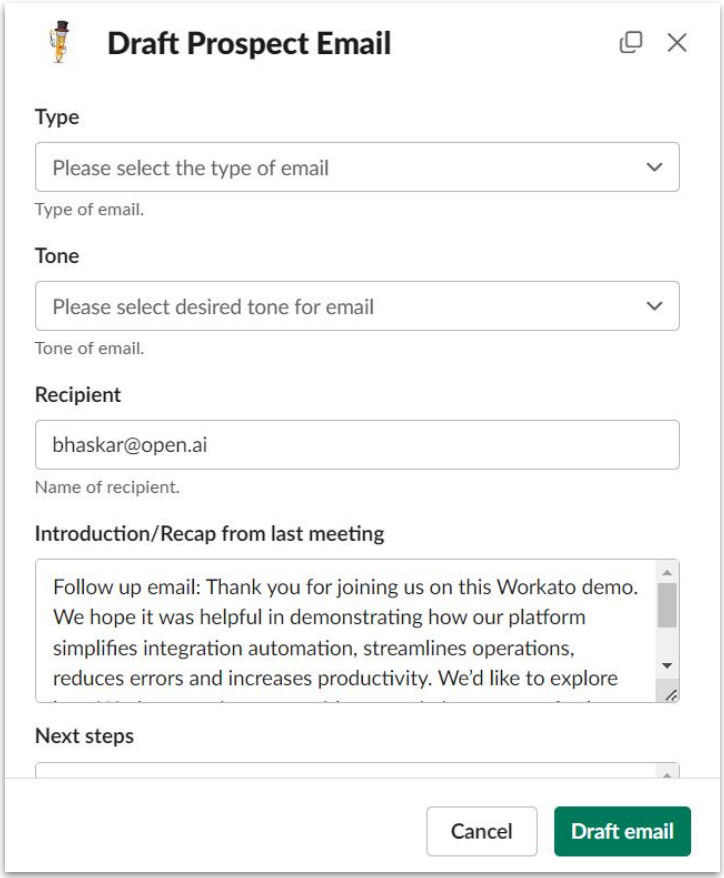




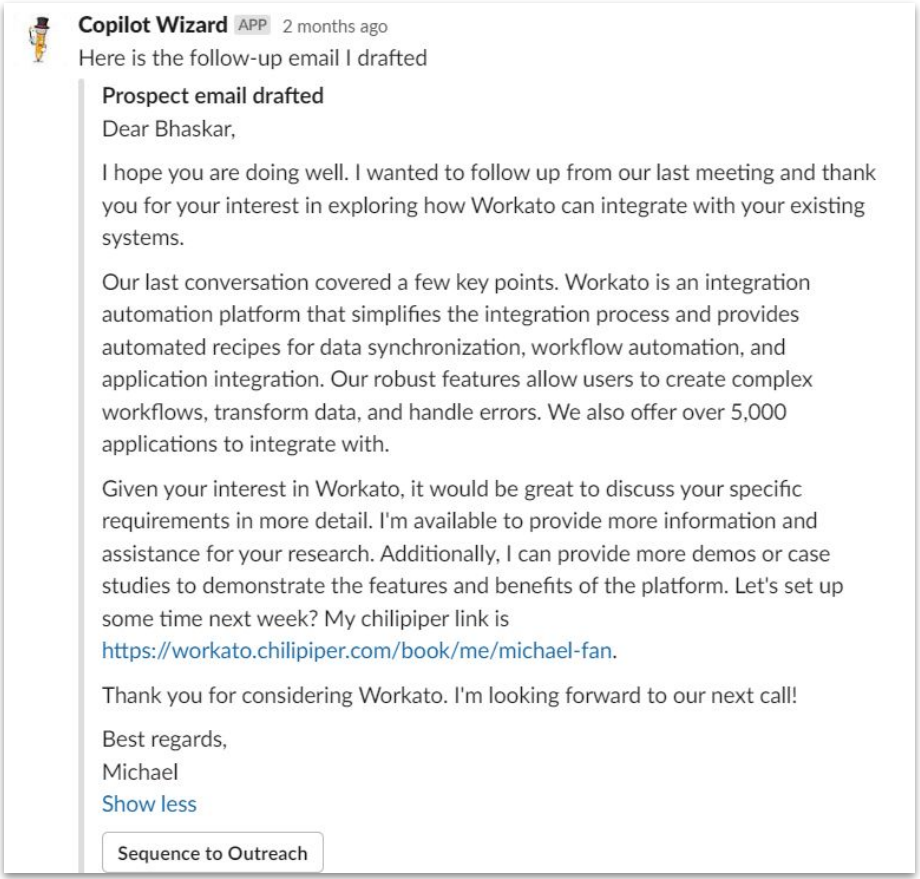
OpenAI Email Follow Up

OpenAI First Email Follow-Up





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.

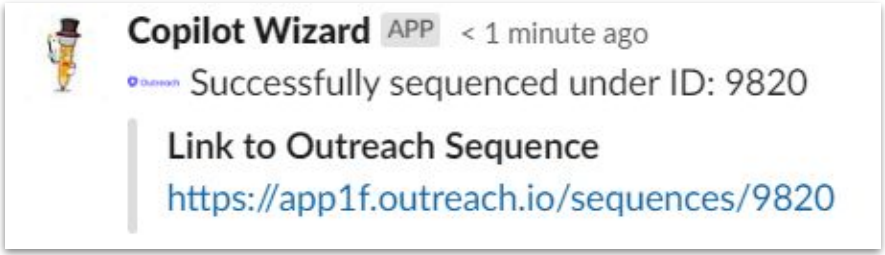
Given your interest in Workato, it would be great to discuss your specific requirements in more detail. I'm available to provide more information and assistance for your research. Additionally, I can provide more demos or case studies to demonstrate the features and benefits of the platform. Let's set 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

Successfully sequenced under ID: 9820

Link to Outreach Sequence

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

Thank you!

Josh Lucas

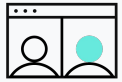
Head of GTM Automation Solutions

Linkedin.com/in/joshlucas19

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.

Attendees

Execs & Dept Leaders | Ops Teams & Builders | Leaders & Ops

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

Workato Proprietary and Confidential

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AUTOMATE 2023

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

FEATURED SPEAKERS

Hillary Carpio
Sr. Director, ABM

snowflake

SCOTT BRINKER
VP of Platform Ecosystem

HubSpot

STEFANO MAZZALAI
Sr. Manager of Marketing Operations

Demandbase

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AUTOMATE 2023

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

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