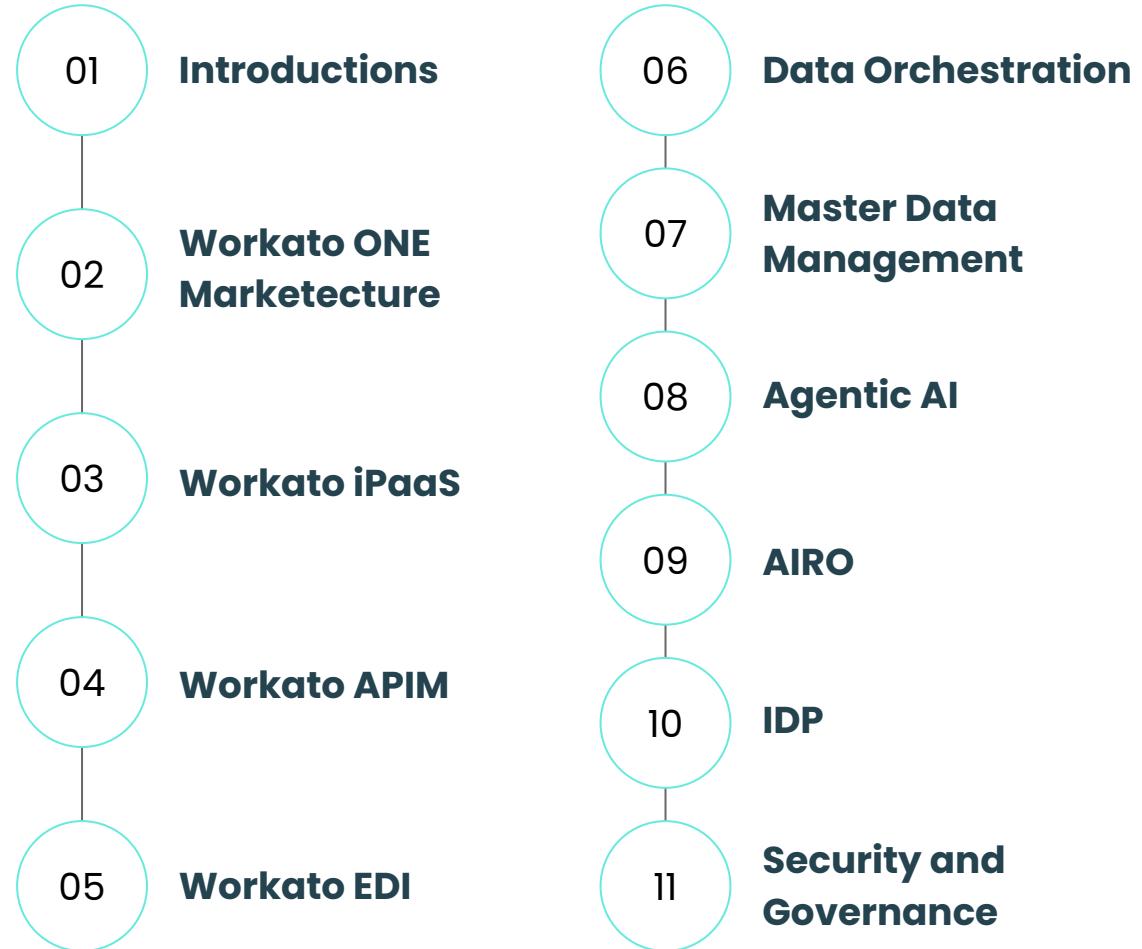


Workato Product Overview Presentation

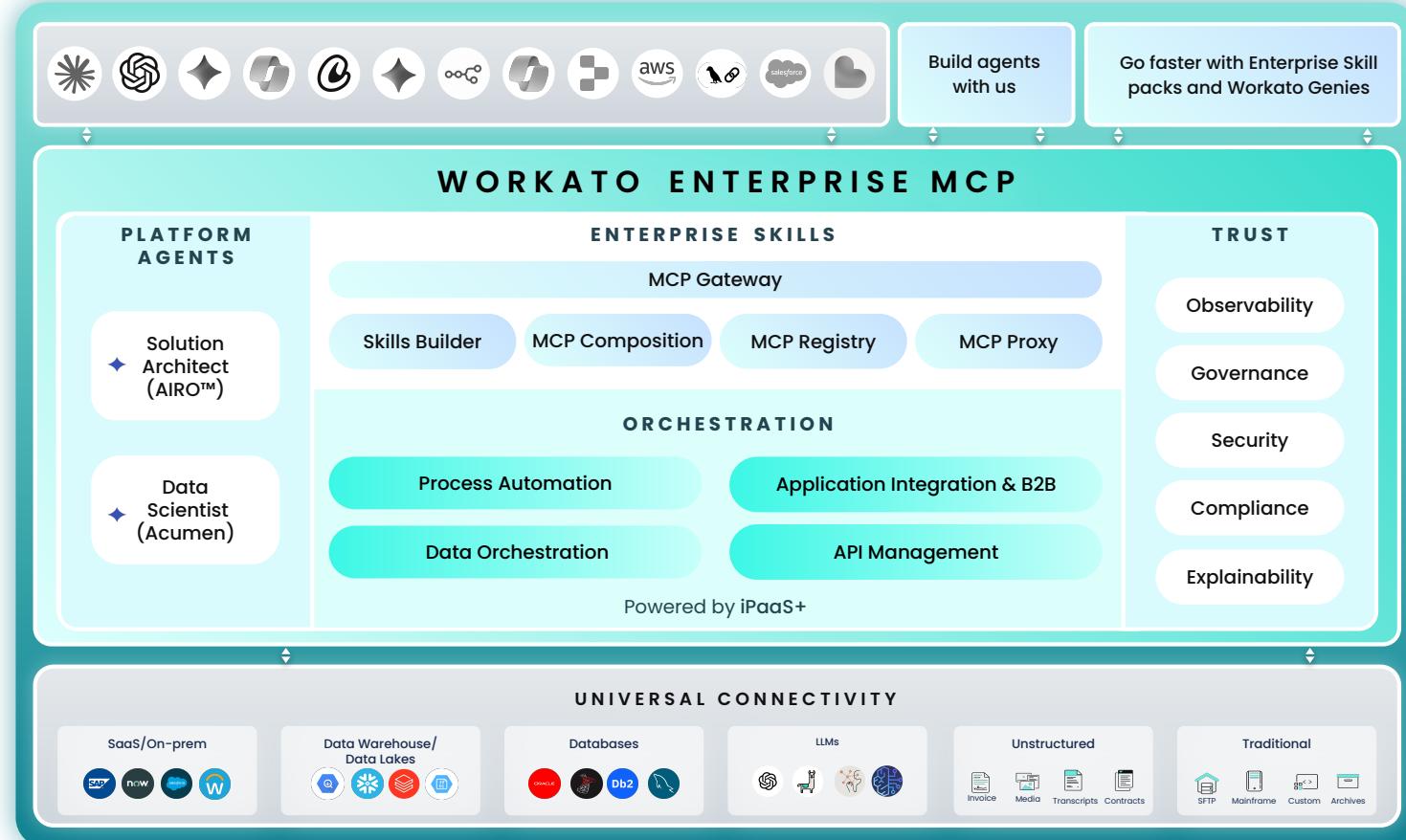


Agenda



workato ONE

Orchestration for the Agentic Era—Powered by the #1 iPaaS.



Workato iPaaS

Workato iPaaS

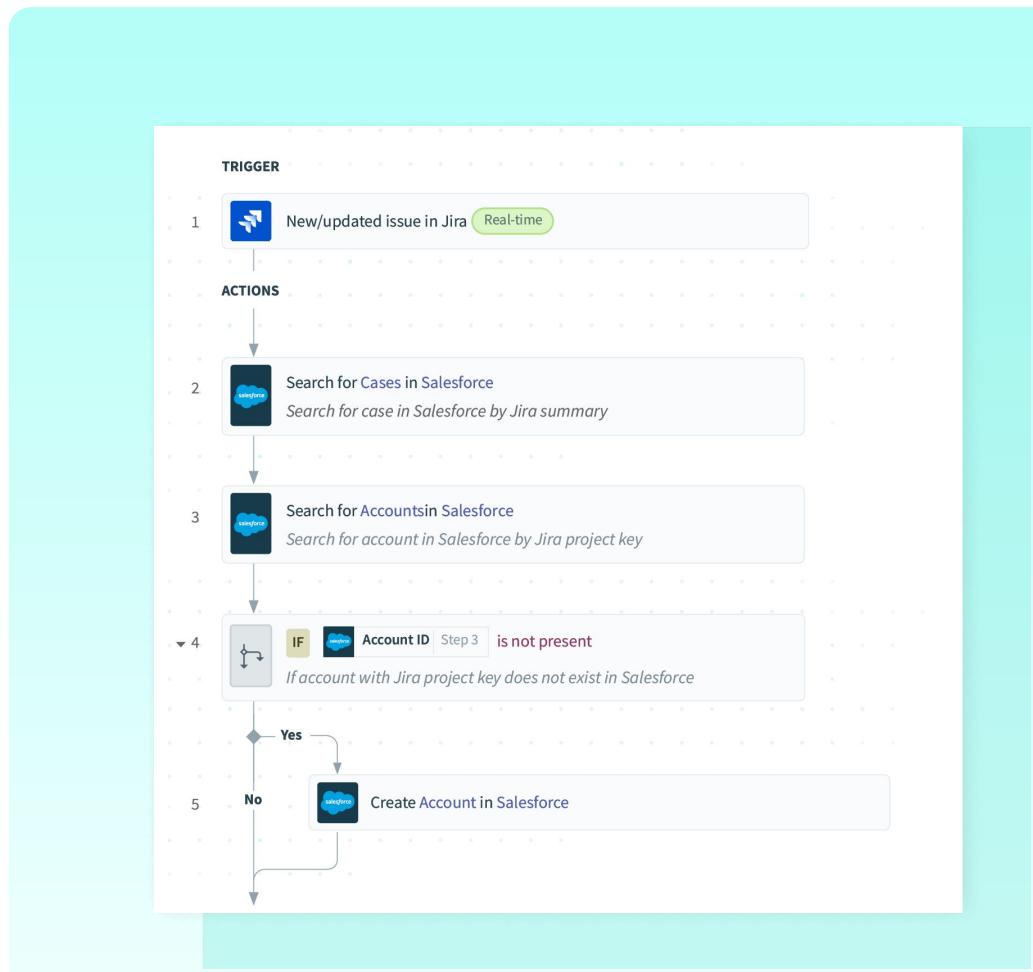
Orchestrate data, apps, and APIs through a single platform

Features

- Unified enterprise platform
- AI-assisted recipe development
- Connect to 12,000+ apps

Benefits

- Accelerate integration delivery
- Scale Securely with zero downtime
- Gain insight and visibility



Connectors and Recipes

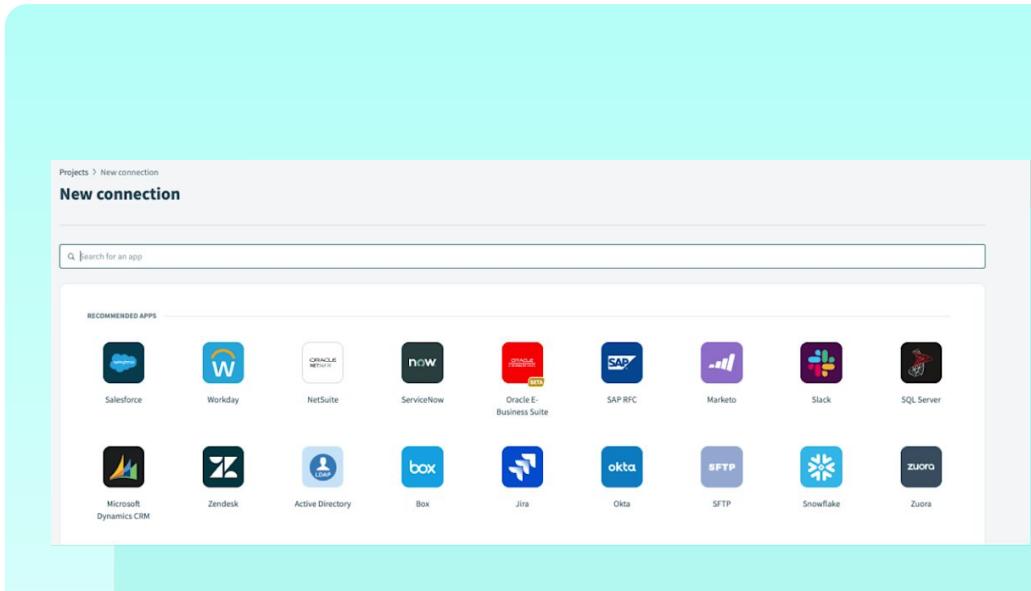
Quickly connect any app with pre-built connectors and recipes

Features

- 1200+ Pre-built connectors
- AI-powered guidance and copilots
- Reusable recipes and templates

Benefits

- Scale automations faster
- Empower business and IT collaboration
- Support enterprise-scale workloads



Decision Models

Transform complex business rules into consistent results.

Features

- Manage business rules in a clear, familiar format.
- Connect easily to recipes with audit support.
- Built for scale, compliance, and governance

Benefits

- Streamline decision-making for key processes.
- Maintain logic without disrupting workflows.

The screenshot displays two main components of a decision model interface:

Leads Routing Decision

Rule name	CONDITIONS			OUTCOMES	
	Industry	Company Size	Interest Level	Lead Priority	Sales Ready
1 Large Tech, high interest	Tech	> 500	> 4	High	True
2 Large Tech, low interest	Tech	> 500	< 2	Medium	False
3 Smaller Tech, high interest	Tech	any	> 4	Medium	True
4 Smaller Tech, moderate interest	Tech	any	> 3	Low	False
5 Large Financial firms, high interest	Financial Services	> 500	> 4	High	True
6 Large Financial firms, moderate interest	Financial Services	> 500	> 3	Medium	True
7 Mid-sized Financial firms	Financial Services	> 100	> 3	Medium	False
8 Small Financial firms	Financial Services	any	> 3	Low	False
9 Large Healthcare, high interest	Healthcare	> 200	> 4	High	True
10 Larger Healthcare, cautious buyers	Healthcare	> 200	< 3	Medium	False
11 Smaller Healthcare companies	Healthcare	any	< 3	Low	False
12 Large manufacturers, high interest	Manufacturing	> 1,000	> 4	Medium	True
13 Large manufacturers, moderate interest	Manufacturing	> 1,000	> 3	Medium	False
14 Smaller manufacturers	Manufacturing	any	> 3	Low	False
15 Large comp non-target ind, high interest	Any Other Industry	> 500	= 5	Medium	True

Workflow Diagram

```
graph TD
    Input[Input 3 nodes] --> Rule1[1: Baseline Eligibility & Risk]
    Rule1 --> Rule2[2: Risk & Compliance]
    Rule2 --> Promotions[Check for Promos]
    Promotions --> Promotions[Promo Code is present]
    Promotions --> Rule3[3: Promotions & Campaigns]
    Rule3 --> Rule4[4: Final Offer Assembly]
    Rule4 --> Output[Output 3 nodes]
```

The workflow starts with an input of 3 nodes, leading to a rule step "1: Baseline Eligibility & Risk". This leads to "2: Risk & Compliance", which then leads to a decision step "Check for Promos" with the condition "Promo Code is present". If true, it leads to "3: Promotions & Campaigns" (1 rule defined). Finally, it leads to "4: Final Offer Assembly", which then leads to an output of 3 nodes.

Low-Code Apps

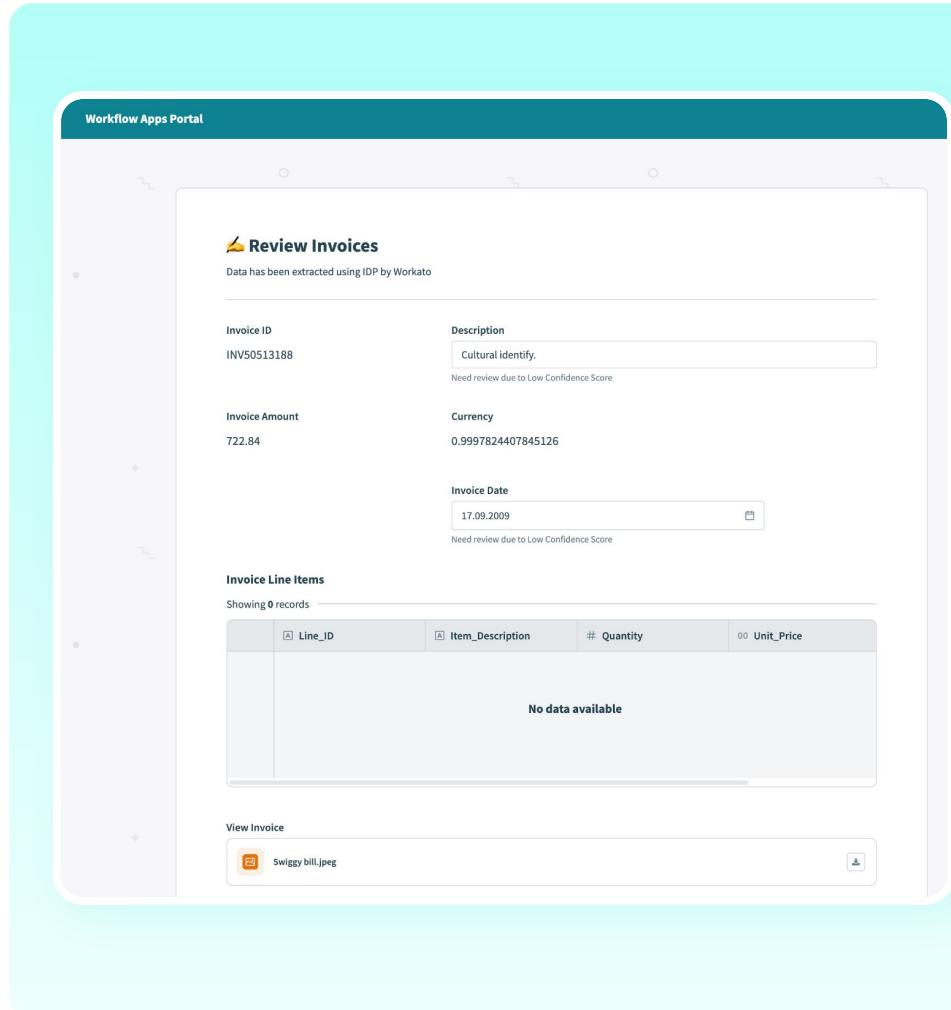
Quickly build powerful low code workflow apps

Features

- Drag-and-drop page editor
- Design custom user interfaces
- Connect interfaces with data across apps, business rules, human interaction, and AI

Benefits

- Turn complex workflows into enterprise-friendly applications – without code.
- Efficient and timely task completion through automatically assigned tasks and notifications.



APIM

APIM

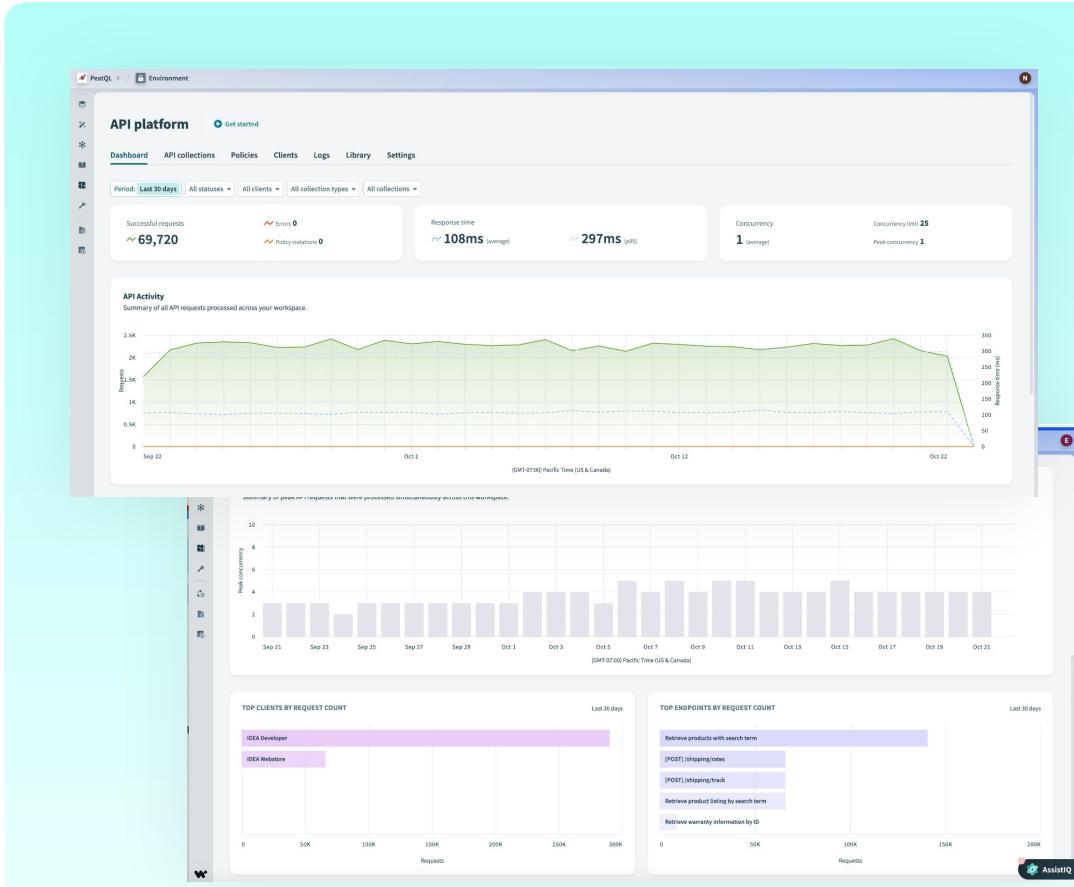
Easily create, manage, secure, and Socialize your APIs in one place

Features

- Create and proxy APIs effortlessly
- Enterprise security and governance
- Developer portal for easy API discovery and access

Benefits

- Accelerate AI and automation in one unified platform
- Enterprise grade security and governance at scale
- Self-service discovery and reuse of APIs

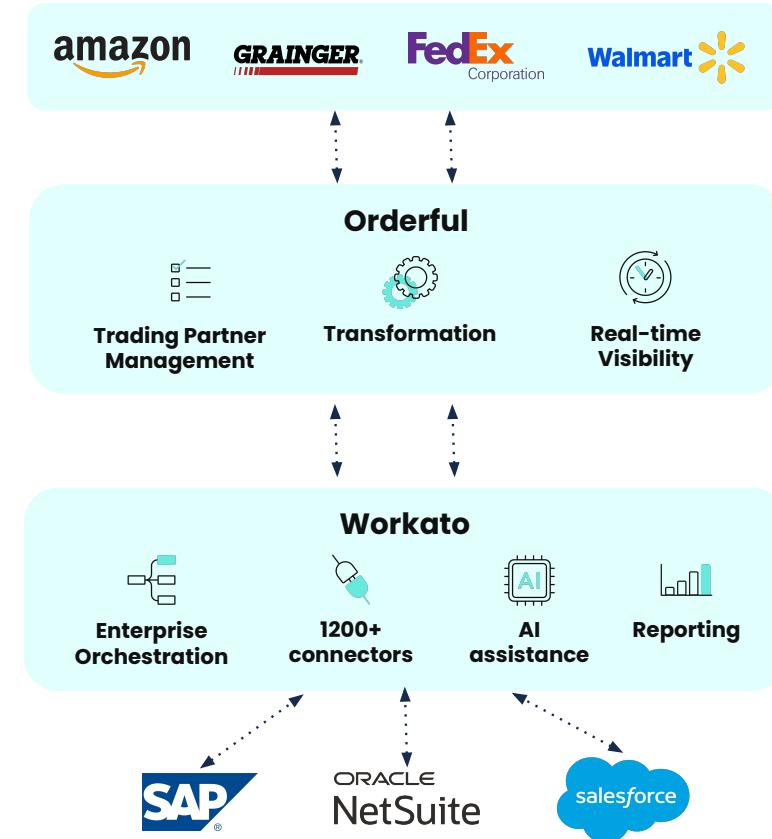


Workato EDI

Workato EDI powered by Orderful

Features

- Pre-built trading partner configurations
- Real-time validation and visibility
- End-to-end automation and orchestration
- EDI Genie for AI-assisted troubleshooting
- Formats: X12, EDIFACT, XML, API, JSON
Protocols: AS2, MFT, OFTP, FTP, VAN



Benefits

- 90% reduction in custom mapping and IT overhead
- Faster partner onboarding—go live in days, not months
- Smarter, more resilient EDI operations with AI

One Seamless Experience from Start to Scale

Single Contract

Purchase through Workato, streamlined vendor management

Unified Onboarding

Setup led by Workato aligned with your integration and orchestration goals

Single Point of Support

One team, full visibility, faster issue resolution

Workato EDI powered by Orderful

EDI Connector

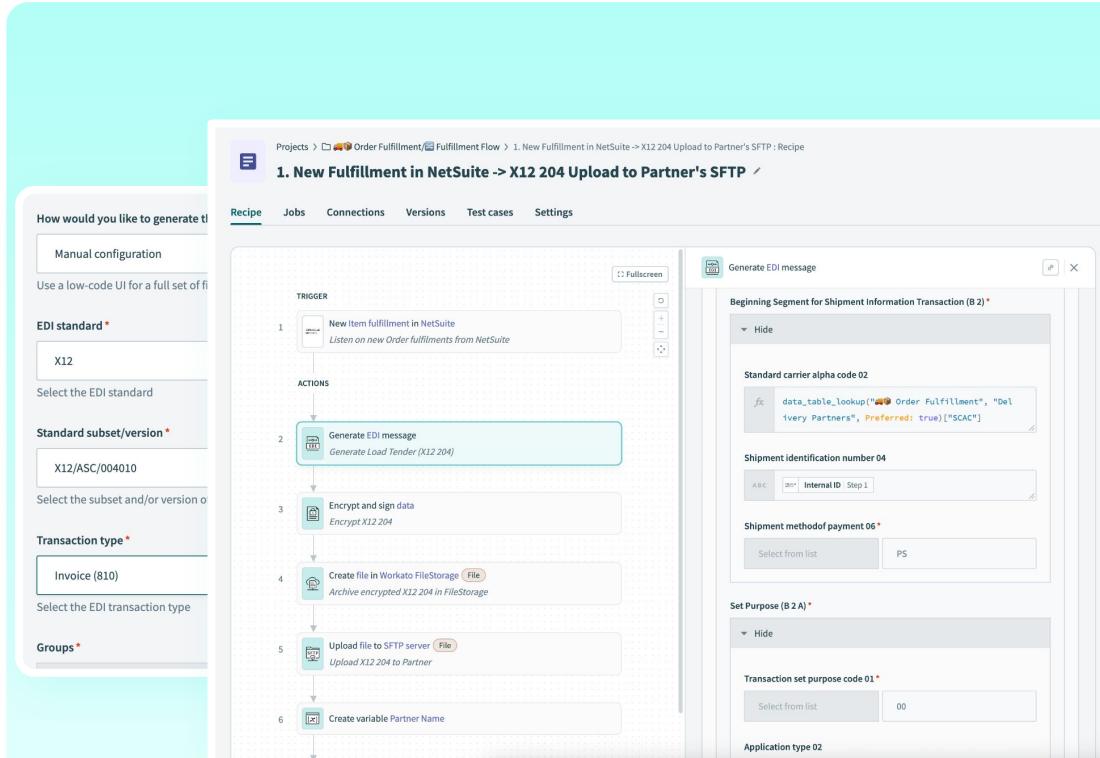
Bring EDI data into your automations

Features

- EDI file creation and reading
- Low-code mapping interface
- Supports X12, EDIFACT and HL7

Benefits

- Simplify mapping process & reduce errors
- Streamline B2B communications
- Connect EDI to core systems



Data Orchestration

Data Orchestration

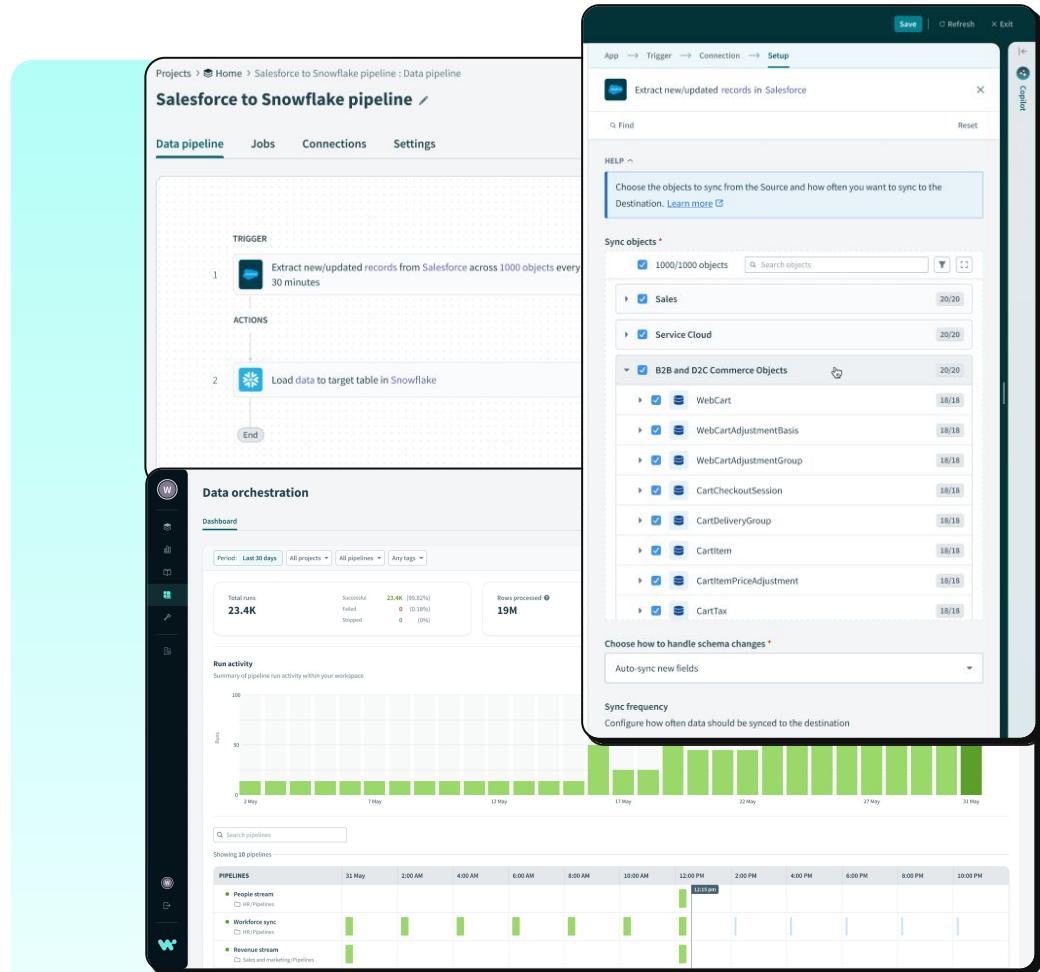
All your data flows, one unified platform

Features

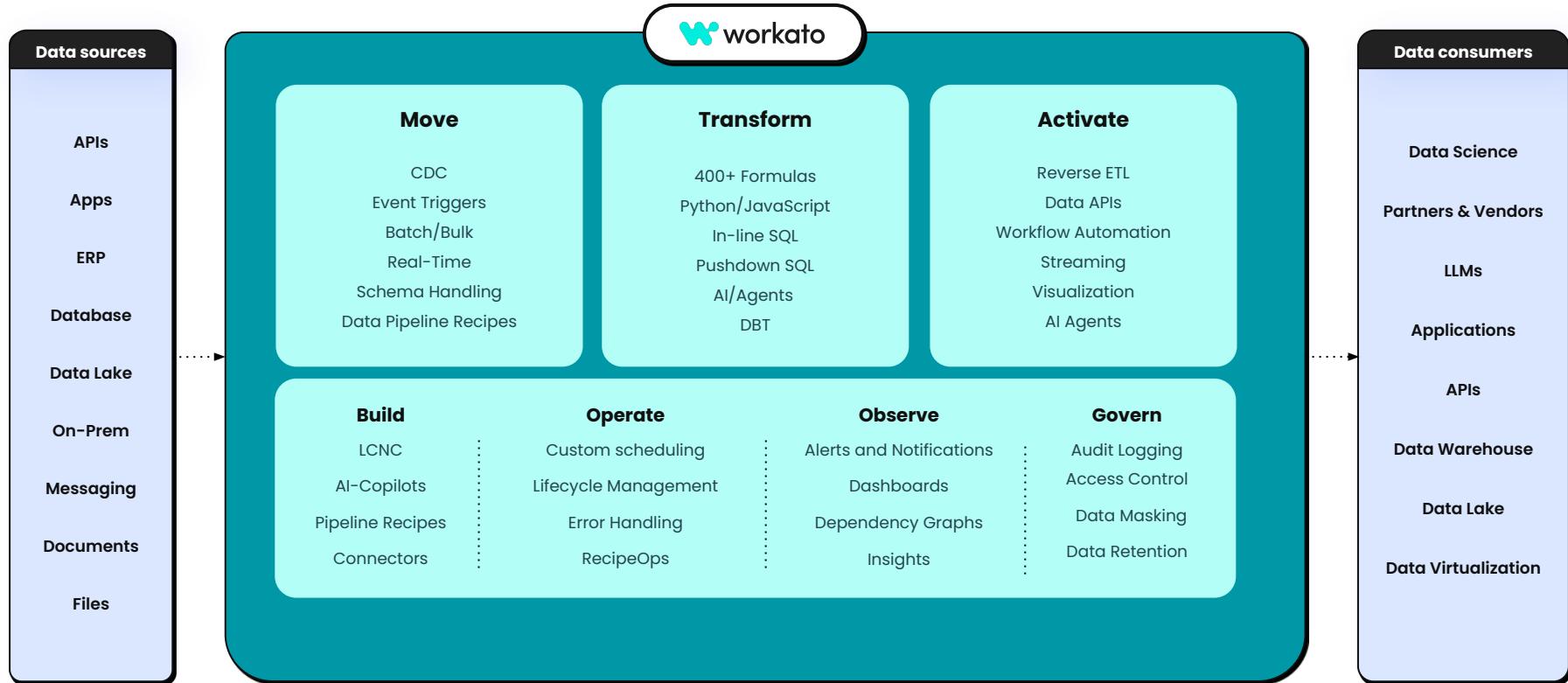
- Supports all patterns (ETL, ELT, Reverse ETL)
- Data ingestion, transformation, activation
- Resilient data pipelines
- End-to-end observability and governance

Benefits

- Activate data and data products across the organizations
- Rapidly deliver AI and Agentic-ready data
- Eliminate Data Silos, Reduce Engineering Burden



Workato Data Orchestration



Master Data Management (MDM)

Workato Data Hub powered by Reltio

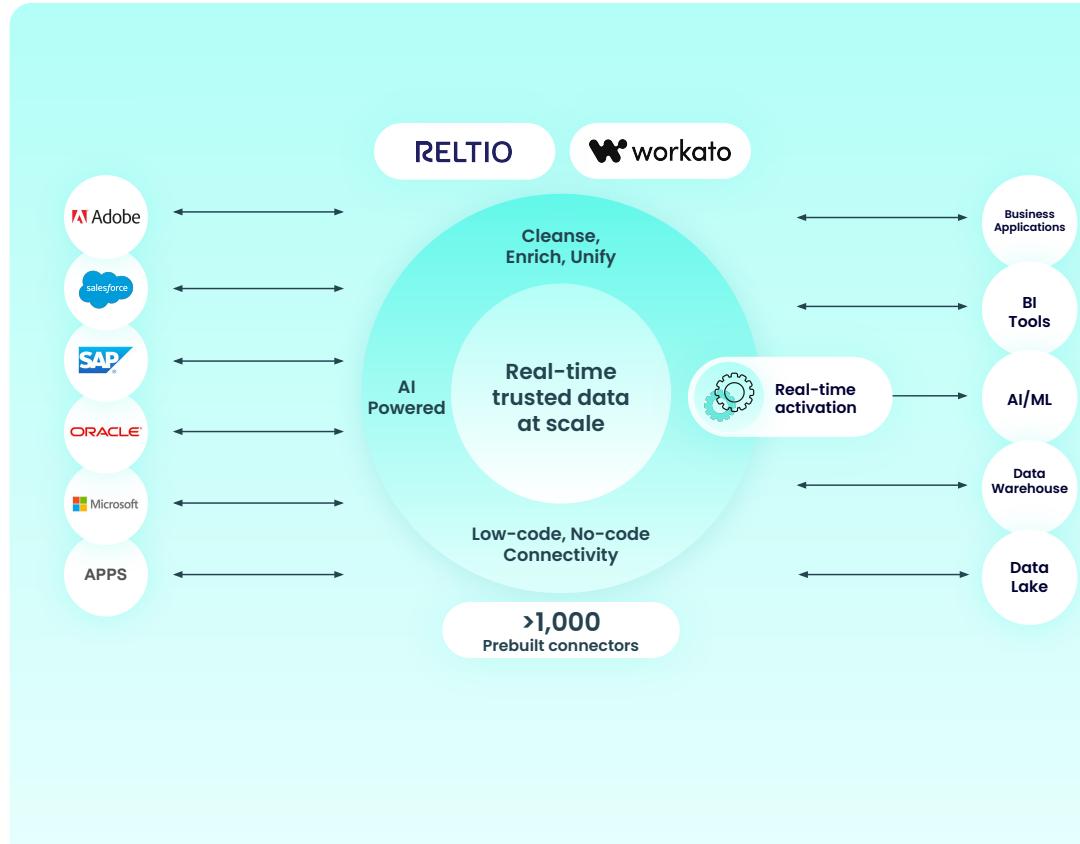
Unified, trusted data and real-time activation

Features

- Unify, standardize, and activate data across business domains
- AI-Powered Match & Merge
- Data Quality & Governance

Benefits

- Turn real-time insights into action
- Personalize customer engagements and experiences
- Automate integration processes and reduce manual effort
- Streamline governance and ensure compliance



Agentic AI

Workato: Three Paths to Value with AI Agents

Workato Genies

Pre-built AI Agents
for lines of business

Agent Studio

Low code agent
builder for IT teams

Enterprise MCP

Manage and
extend any agent

Full Enterprise Context – 10k apps and data sources

Enterprise Skills

Orchestration

Unified Governance and Security

Single End User Experience

Built and Deployed on Workato ONE

Workato Genies

AI Agents that work

- **Pre-built and ready to deploy:** Deploy pre-packaged Genies quickly, accelerating time to value and reducing technical complexity.
- **Fully Extensible:** Customize each Genie for your unique KPIs and equip Genies with the skills, actions, and knowledge needed to achieve business goals.
- **Powered by Deep Action™:** Save hours on complex workflows that span multiple steps and applications.
- **Full Enterprise Context:** Connect to 10,000+ applications, knowledge bases, enterprise data sources, and more.
- **Secure and Enterprise Ready:** Workato Genies are trusted and secure, with robust governance, compliance and observability, and precise IT control.



Agent Studio

Build, Deploy and Manage Genies

- **Enterprise-Ready Agents:** Define roles, train on policies, and set KPIs, with built-in monitoring and testing.
- **Deep Action™ at Scale:** Agents perform multi-step actions with Enterprise Skills across 1,000+ apps.
- **Grounded in Your Business:** Knowledge bases anchor responses in your company's data and context for accuracy.
- **Secure & Compliant:** Patented real-time authorization, SSO, and access controls with full observability and audit trails.
- **Seamless Integration:** Connects to all apps and data—no code needed.

DataVault Sales CPQ Genie

Powered by * Chat interface

Anthropic Claude Slack ⚙ Disconnect Reconfigure

Job description

Prompt that will be sent to the AI model powering this genie [Edit](#)

You are Sales Genie, an AI assistant dedicated to helping sales teams maximize their productivity by efficiently managing Salesforce data and conducting prospect research. Your primary goal is to enable sales professionals to spend more time engaging with customers and closing deals by automating routine tasks and providing actionable insights.

Core Responsibilities

- Salesforce Data Management: Help users find, update, and analyze customer and prospect information within Salesforce
- External Research: Supplement Salesforce data with relevant online research about companies and prospects
- Proactive Maintenance: Identify and suggest improvements to Salesforce data quality and completeness
- Sales Intelligence: Provide insights and analysis to support sales strategies and decision-making

Operating Principles

- Be Proactive and Autonomous
- Skills (7)** What this genie can do [+ Add](#)
- Search skills
- Search Salesforce using SOQL** Use when: This skill as a function to search/query Salesforce records (SOQL query capability), for example when information about Leads is requested.
- Get list of Salesforce Objects** Use when: Get list of Salesforce Objects
- Get Salesforce Object metadata** Use when: Retrieves the Salesforce fields for a specific object. Provide a reason so that the list of fields is filtered based on your reason.
- Update Object in Salesforce** Use when: Use this to update an object in Salesforce. Provide a valid object name by calling the "Get list of Salesforce Objects" tool. Provide a valid SFDC object ID by using the "Search Salesforce using SOQL" tool. Then...
- Create object in Salesforce** Use when: Use this to create an object in Salesforce. Provide a valid object name by calling the "Get list of Salesforce Objects" tool. Then provide valid fields by calling the "Get Salesforce Object metadata" tool and usin...
- Create Quote** Use when: When requestor asks for a quote to be created
- think** Use when: Use the tool to think about something. It will not obtain new information or make any changes to the repository, but just log the thought. Use it when complex reasoning or brainstorming is needed. For example, if...

Workato Enterprise MCP

Give AI agents secure, contextual access to act across the enterprise.

AI That Acts, Not Just Chats

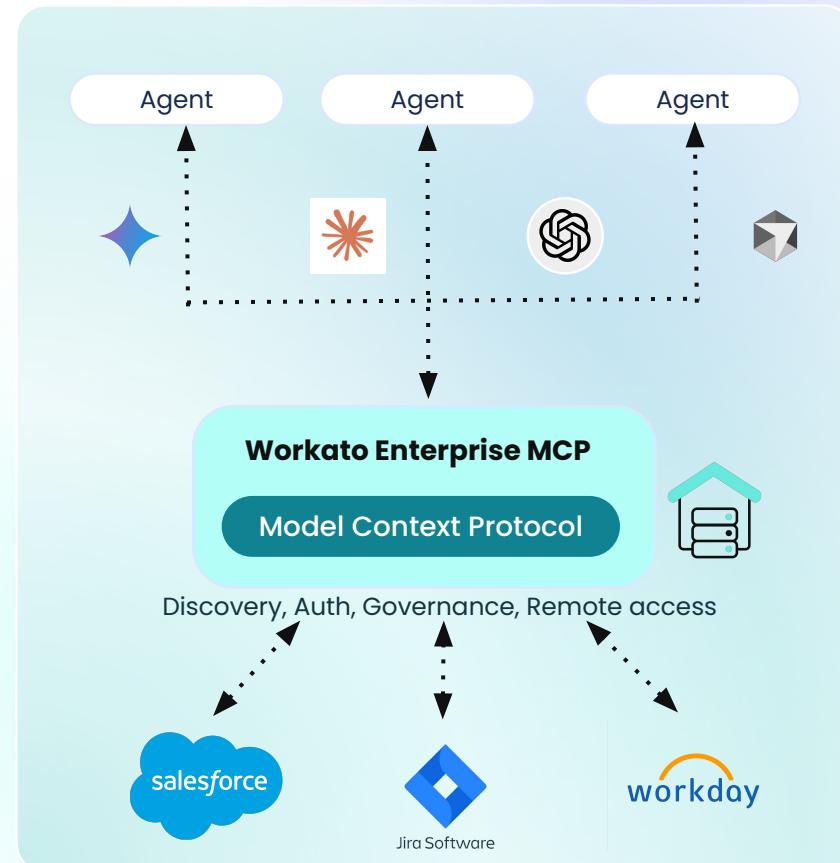
Turn any recipe into a secure MCP server — or connect instantly with 100+ pre-built ones.

Enterprise Skills, Powered by Workato

Compose MCP servers across 12,000+ apps for reliable, governed enterprise actions.

Deploy, Scale, and Govern Instantly

Fully managed and serverless — no code, no token juggling, no maintenance.



Workato GO

The First Enterprise Search with Deep Action™

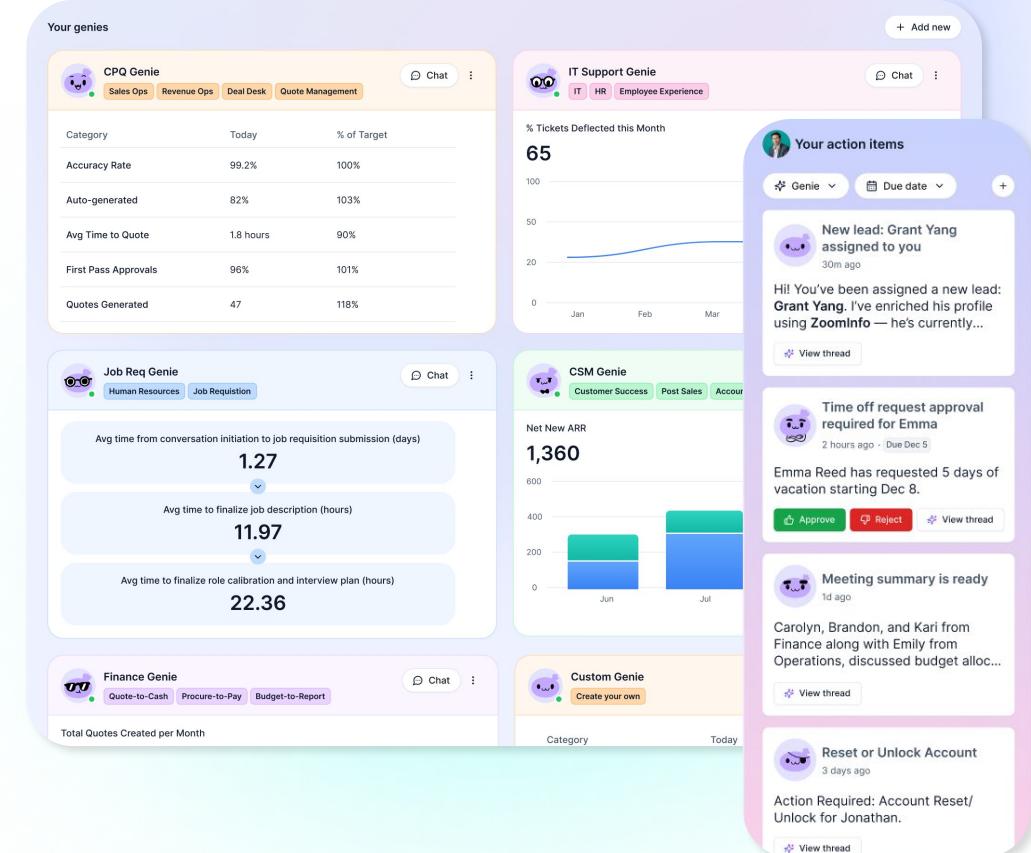
- **Enterprise Search:** Search everything – docs, data, apps – with security and control
- **Powered by Deep Action™:** Save hours on complex workflows that span multiple steps and applications
- **Action Board:** Track Genie-driven outcomes and business KPIs in customizable views to understand performance and ROI
- **Single User Interface:** A single place for employees to go to find what they need and use Genies to get their work done

The screenshot displays the Workato GO interface. At the top, a purple header bar features the text "How can I help you today, Alec?". Below this is a search bar with the placeholder "Ask anything about Workato". To the right of the search bar are several buttons: "Ask" (with a dropdown arrow), "Find", "All sources" (with a dropdown arrow), and a magnifying glass icon. Below the search bar is a row of action buttons: "Create Opportunity", "Update Opportunity", "Create Account", "Raise Request", "View Request", and "Refresh". The main content area is divided into sections: "Thread updates" (listing items like "Request access to Jira" and "Reset my Okta MFA or unlock my account"), "Suggested" (listing items like "Gmail", "PROD Projects", "Onboarding document", "Intercom", "Onboarding document", "Pinning Design Explorations", "PROD Projects", "Mega Corporation Document", and "Sales Team Document"), and a "Today" section (listing a "Proposal Review with Mega Corporation" scheduled for 11:00 AM - 12:00 PM and a "Kevin/Cindy 1:1" meeting from 2:00 PM - 3:00 PM). The bottom right corner shows a "Join" button.

Action Board

Your Genie command center to measure impact, prove ROI, and act on what matters

- Measure what matters:** Correlate Genie performance with operational KPIs in real time to prove ROI and business impact
- Personalize your view:** Configure insights and visualizations for your team or role to highlight the metrics that drive smarter decisions
- Act instantly:** Manage alerts, approvals, and tasks or trigger Genie workflows directly within one workspace to resolve issues faster and keep work moving





Workato AIRO and Acumen

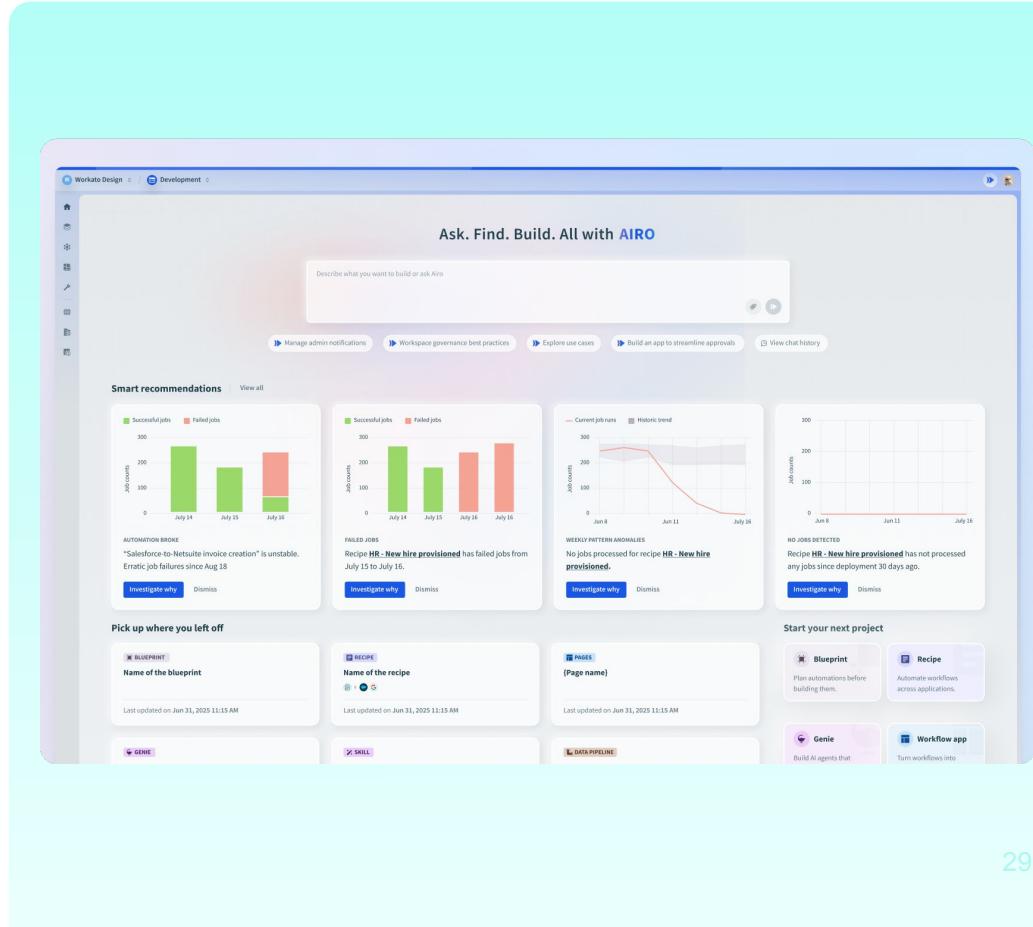
AI-driven, Intent-based, real-time orchestrator

Features

- Knows your role and workspace for personalized help.
- Unified homepage with tailored suggestions.
- Chat with AIRO anywhere.
- Goal-driven design, optimized recipes, and auto-generated solutions for the best results.

Benefits

- Fast, relevant answers.
- Seamlessly resume work, fix issues, or start new projects.
- Proactive issue monitoring.



IDP

Workato IDP (Intelligent Document Processing)

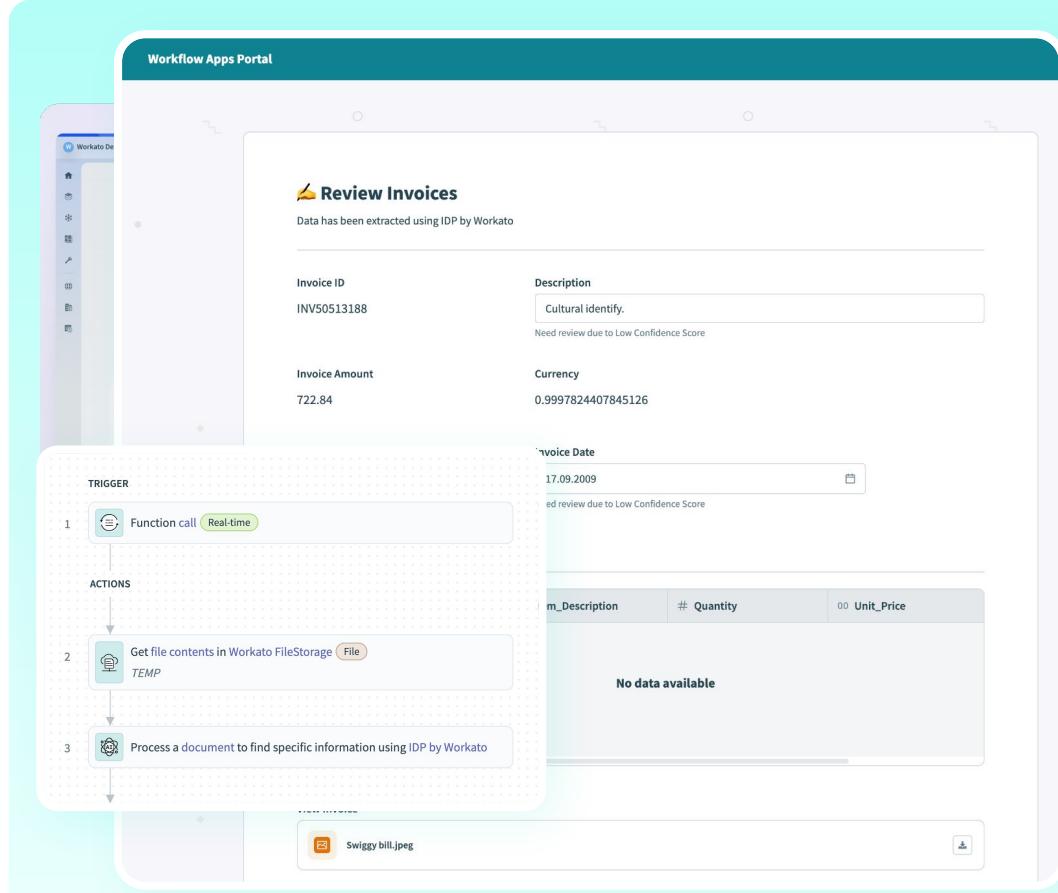
Automate workflows from any document – instantly / intelligently

Features

- Multi format support
- Embed IDP into recipes
- Pre-trained, multi-language models

Benefits

- Eliminate manual data entry
- Detect inconsistencies, flag missing data
- Ready to use out of the box—no training required



Security & Governance

Enterprise-Grade by Default

Governance	Security	Compliance	Operational Excellence
<ul style="list-style-type: none">✓ AHQ Governance and Workspace Federation✓ Log streaming✓ Real-time audit✓ RBAC✓ Data retention control✓ SAML JITP, SCIM✓ Environment separation	<ul style="list-style-type: none">✓ EKM, BYOK✓ Hourly Key rotation✓ Secrets manager✓ Data masking✓ TLS 1.2 encrypted✓ 2FA✓ SAML SSO✓ OAuth 2.0✓ API Traffic Mirroring	<ul style="list-style-type: none">✓ GDPR✓ ISO 27001 and ISO 27701✓ HIPAA, PCI✓ SOX ready✓ Regional DCs✓ IRAP	<ul style="list-style-type: none">✓ Cloud & OPA deployments✓ Elastic scaling✓ Fault tolerance✓ Load balancing✓ 99.9% uptime✓ Private link connectivity

Deployment options

Commercial cloud, VPW, private connectivity, GovCloud, and OPA

Thank you

