

Workato Orchestrate Case Studies

Unlock Risk Reduction, Efficiency, Agility and Growth with Workato

SEATGEEK

90%

Of bank transactions automated to free up .5 FTE for efficiency

NAVAN

4X

Faster processes recruiting, interviewing and onboarding new hires

avidxchange®

\$100K

Saved per year digitally transforming marketing and online payments

vituity®

At the heart of better care.

30%

Higher organizational productivity to improve patient experience



Intelligently Defining Aviation®

195K

Hours saved by orchestrating partner orders and tickets

Unlock Risk Reduction, Efficiency, Agility and Growth with Workato

 **ATLASSIAN**

100K+

hours saved in Year 1 across IT, Finance, HR.



2 months to first value

 **BROADCOM®**

6 secs

to onboard 10k+ employees and provision apps after M&A.



2 weeks to first value

 **DOORDASH**

90%

faster finance processes while driving SOX compliance.



1 month to first value

 **snowflake**

3x

pipeline generated through ABM and lead to opp orchestration.



3 months to first value

 **EPICOR**

80%

reduction in development time.



1 week to first value

Workato One/Agentic Customer Stories



samsara

Agents in prod	1 (IT)
Requests processed by Agents/month	4,392
% of requests handled autonomously	85%
CSAT	94.9%

85% IT requests handled autonomously with ITGenie

The Challenge

- They were using Moveworks for IT Helpdesk automation and could not go beyond 20% ticket deflection rate.
- Any automation and use case they wanted, required months as it required the vendor to prioritize those items in their roadmap
- Not a true agentic platform they could scale with and build additional agents for various lines of business, like Sales, Marketing.

The Solution – ITGenie + Workato ONE

- ITGenie powered by the Workato ONE platform enables Samsara to keep adding additional Skills to ITGenie to continuously improve ticket deflection rate
- A true agentic platform to build additional Agents and scale to other lines of business

The Workato Advantage:

- An **extensible platform** to build various purpose-specific agents
- Agents with Deep Action that can **orchestrate complex workflows** end-to-end
- Enterprise skills capability enabling the team to keep automating various use cases and **continuously improve** deflection rates



Drive efficiency with wall-to-wall Agents across IT, Finance, Marketing, and more

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- Wanted to go wall-to-wall Agentic but the platforms available could not meet their enterprise requirements or scale to support the ability for business teams to build agents with security and governance

The Solution - Workato ONE and AgentX Apps

- An Agentic platform that integrated with all their apps, data
- Agents that could orchestrate core business processes across their apps, data
- Pre-packaged agents that they could customize to their needs to realize faster ROI
- LCNC Agent Studio to enable their business teams to build agents with security and governance

The Workato Advantage:

- **Speed:** Rolled out 3 agents to production in the past 5 months and on pace to rollout 4 more in the next 4 months.
- **3500+** hours saved/month
- Meeting SLAs **99%** of the time
- **Continuously improving** deflection rates with autonomous agents
- Great **customer experience** - from initial discussions to rolling out agents in production

Agents in prod	3 (IT, MOps, FinOps)
Requests processed by Agents/month	1,580
% of requests handled autonomously	95%
Impact	3500+ hours saved/month
CSAT	87%



1 CPQ Agent in prod

880 requests processed by Agents/month

91% of requests handled autonomously

400+ Hours saved per month

95% CSAT

CPQGenie improves sales quoting process by 10x

The Challenge

- Highly complex CPQ with a number of SKUs, different pricing models, discounting thresholds, and more.
- Creating quotes was a painful process for the sales team taking an average of 30-40mins and sometimes hours. This was a major concern in the sales leadership team.
- They wanted to form an Agentic COE around a platform, but most solutions were point solutions and could not scale to solving problems across various lines of business

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- **Extensible platform** to build purpose-specific agents across various LOBs. Looking to rollout ITGenie and HRGenie in the next few months.
- **400+** hours saved/month, which gives the sales teams more time to sell



Industry	Distribution
Revenue	\$1B
Region	USA
Employee size	2000

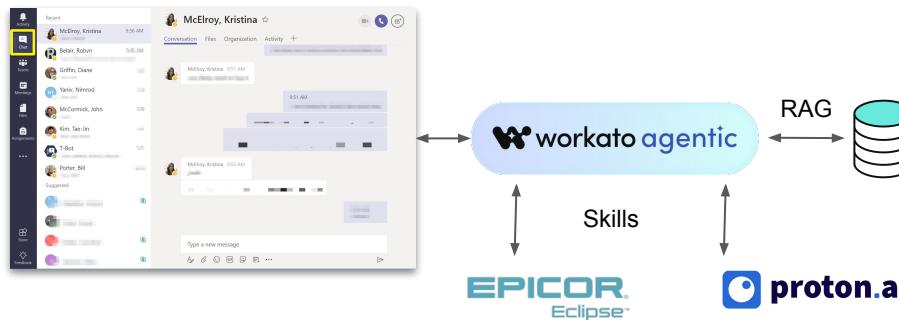
Branch Office AI Agent to revolutionize the Distribution industry

The Challenge

USES I is having a resource drain in its branch offices which could result in poor customer experience

The Solution - Digital Branch Office Clerk

- Acts as a technical advisor
- Provides personalized service based on customer's history that is available in their CRM ([proton.ai](#))
- Lookup the inventory and create a complete order in their ERP (Eclipse)
- Propose alternative products as needed
- Link an order to helpful training content



- Inventory lookup
- Order shopping cart
- Create order
- Customer lookup

B2B Technology

(segment agnostic)

Speed Past The Competition



100K+

hours saved in Year 1 across IT, Finance, and HR through creating a centralized IT team.

Key Apps Connected



50%

reduced marketing list upload time by automating preparation and validation..

Key Apps Connected



80x

faster speed to deliver integrations by using Workato as an integration nervous system.

Key Apps Connected





Orchestrating: Legacy System Migration

Connecting: SAP, Azure SQL DB, Marketo, Fusion, Workfront

Industry: Professional Services, IT Infrastructure

Region: North America

Size: 90,000 employees

Infrastructure Consolidation Leads to \$1M in Cost Savings

The Challenge

After the spin-off from IBM, Kyndryl's GTM teams managed 150+ out of 1,800 inherited sales and marketing applications, many misaligned with business strategies, creating silos and inefficiencies. High infrastructure overhead (\$1M+ per month) and lack of application ownership compounded issues, making security and governance unsustainable.

The Solution

The CIO initiated a project to address these problems with a two year timeline to simplify their technology landscape, which included migrating from legacy systems, realigning to a strategic platform, reducing costs, and integrating 30+ applications for sales and marketing.

The Workato Advantage:

- Increased **speed of integration** development by **80x**
- Improved **business efficiency** by cleaning up 30 overlapping practices
- **Reduced the cost** of infrastructure

"Workato allows us to integrate all our SaaS solutions and evolve quickly whenever a change happens anywhere in our organization."

**Vishwas Chouhan,
Senior Lead, Enterprise Architect**



Orchestrating: Marketing Operations

Connecting: Marketo, Salesforce

Industry: Software

Region: North America

Size: 2,000 employees

How 6sense Cut Hours and Costs

The Challenge

The Marketing Operations team at 6sense faced significant challenges in running customer training sessions. Each session required the creation of multiple assets: 3 emails, 3 static lists, 4 smart campaigns, and 1 Salesforce campaign. With 100 sessions being run each month, this amounted to a total of 87 hours of manual work, often requiring additional support from an agency, costing \$60,000 per year.

The Solution

The Marketing Operations team at 6sense sought to automate the entire process through creating a Workato recipe in an iterative process. They began with automating the updating of Marketo tokens, then the cloning of Marketo programs, and finally the creation of Salesforce campaigns. The results were amazing, as 6sense reduced the customer session creation process from 87 hours to just 38 minutes.

The Workato Advantage:

- Sped up customer session creation process by **137x**
- Eliminated the need for agency support, **saving \$60,000 annually**
- **Saved 2,800 total hours** in 2023

"I loved seeing my team get to try new things. The biggest thing for me was to allow my team more time to follow their interests, to make marketing fun."

Julz James, Senior Manager of MarOps



Orchestrating: iPaaS Consolidation

Connecting: NetSuite, Salesforce, Asana, Anaplan

Industry: Software

Region: North America

Size: 1,000 employees

iPaaS Consolidation Leads to over \$100,000 in Cost Savings Annually

The Challenge

Amplitude, at one point, was using 4 separate iPaaS platforms. Due to this, they were being forced to pay heavy overcharge fees of up to \$300,000 total, negatively affecting the bottom line. Amplitude was also facing a number of challenges in its Finance and Accounting teams, especially its order-to-cash process. This inefficiency was leading to a requisition process that took 8 days.

The Solution

Enter Workato. Technical leadership at Amplitude were impressed by Workato's features, such as LC/NC, speedy time-to-market, GEARS framework, scalability, and reliability. Implementation was a breeze with Workato's 1000+ connectors. Amplitude were able to reduce their requisition approval cycle from 8 to 3 days.

The Workato Advantage:

- Decommissioned 2 iPaaS platforms, **saving over \$100,000 annually**
- **3000+** labor **hours saved** every year
- Reduced requisition approval cycle by **63%**

"By leveraging Workato, we are investing in a future where we will operate more cohesively, efficiently, and effectively."

**Devesh Gupta,
Director of Enterprise Technology**



Orchestrating: Customer Experience

Connecting: Zendesk, SurveyMonkey, Slack, Microsoft Azure Cognitive Services

Industry: Software

Region: North America

Size: 3,000 employees

GitHub Leverages Automation to Enhance Customer Experience

The Challenge

GitHub's customer support team was facing difficulties in delivering a seamless customer experience. Key customer support systems, such as Zendesk and GitHub, were not integrated, leading to inefficient workflows and missed insights. The team had a large backlog of support items, slowing down response times and negatively impacting customer satisfaction. The engineering team was spread thin.

The Solution

GitHub leveraged Workato's automation platform to streamline and connect their disparate support systems. They were able to capture and automatically route customer feedback collected through SurveyMonkey. Additionally, GitHub directly linked survey responses to Zendesk tickets and GitHub issues, allowing the team to act on feedback faster.

The Workato Advantage:

- **Reduced resolution time** – customer problems that took months to resolve now take hours.
- **Improved satisfaction** – customers feel seen and heard.
- **Cleared backlog** – Automated workflows helped the team clear the backlog, allowing developers to focus more on product development.

"The core focus is on visibility and surfacing insights with different platforms. Workato helps us better understand our customers by tying data in from multiple platforms."

**Matt Salem ,
Sr. Program Manager, Voice of the Customer**

Workato Proprietary and Confidential



Malwarebytes®

Orchestrating: Customer Experience

Connecting: Snowflake, Zuora, bill.com, Tableau, Salesforce, NetSuite, Logisense, etc.

Industry: Cyber Security

Region: North America

Size: 800 employees

Malwarebytes Automate Financial Processes, 66 Days Saved Annually

The Challenge

Teams had to reinvent the wheel each time they needed to leverage data and would manually organize data per project/request. Siloed financial and customer data obscured the CFO's visibility into the business, negatively impacting both accounting and operations teams. Generally, manual processes slowed contract renewals, monitoring of usage-based billing, seat requests and more.

The Solution

To solve these problems, Malwarebytes undertook multiple projects. Firstly, they automated data flows to Snowflake. Secondly, they automated financial reporting, contract renewals and usage-based billing, and expanded automation into places in the organization where a process is highly labor-intensive.

The Workato Advantage:

- **66 full-time days saved** every year by automating processes.
- Increased customer lifetime value and **reduced acquisition costs** via contract auto renewals.
- Robust financial reporting uncovers **critical profit- and growth-driving insights**.

"We're moving a lot of business logic into Workato, so it has become the orchestration engine for our processes."

**Bill VanderWall,
VP, Business Applications (Alum)**



Orchestrating: Legacy System Migration, Workday Migration

Connecting: Salesforce, AWS, Datadog, Workday, Netsuite

Industry: Software

Region: North America

Size: 800 employees

Alation Reduces TCO and Increases Agility Through Workato

The Challenge

Alation faced rapid growth challenges compounded by legacy iPaaS solutions, manual processes, connectivity limitations, and high operational costs. These obstacles hindered visibility and resulted in missed business opportunities.

The Solution

Alation initiated a rapid rollout with Workato, eliminating their legacy iPaaS and rolling out critical NetSuite use cases within just two weeks. The journey quickly scaled, automating HR processes like a Workday migration in 2024.

The Workato Advantage:

- Productivity Gains:** Eliminated over-reliance on manual ticketing systems, reducing turnaround from 1–3 days to under an hour.
- Cost Savings:** Achieved over 3X reduction in TCO through optimized licensing and automation.
- Speed Gains:** 97% faster product provisioning.

"We've scaled Workato for efficiency gains across the entire company. It pays for itself."

Eric Luehmann
VP of Enterprise Technology



samsara

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Workato Proprietary and Confidential

Agents in prod

3 (IT, MOps,
FinOps)

Requests processed by
Agents/month

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autonomously

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Impact

3500+ hours
saved/month

CSAT

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Requests processed by Agents/month	880
% of requests handled autonomously	91%
Impact	400+ hours saved/month
CSAT	95%

Retail / Entertainment / Hospitality /
Social Platforms
(segment agnostic)

Unleash Speed and Power

DAVID JONES

800+

Retail locations managed with 24/7 visibility.

Key Apps Connected



67%

Reduction in Integration build time.

Key Apps Connected



THREDUP

53%

Reduction in Total Cost of Ownership.

Key Apps Connected



amazon

NIKE

Michaels

MERCARI

H&M



Orchestrating:
Finance Transformation, APIM,
Boomi and Zapier replacement

Connecting: NetSuite, Coupa,
Airflow

Industry: Retail

Region: North America

Size: 2,500 employees

How ThredUp Accelerated Beyond Boomi

The Challenge

The integration team at ThredUp used Boomi for two years but found it too complex and difficult to scale because it required specialized resources, the team had to rely on expensive professional services, and custom coding in NetSuite. They sought a low-code solution to streamline processes, as manual Excel-to-NetSuite postings during month-end closings posed inefficiencies and compliance issues. Zapier provided basic automation but lacked scalability and ownership, adding further challenges for the team.

The Solution

With Workato the team **no longer requires professional services** to manage integrations with NetSuite and their internal app to automate monthly close processes, including GL accounts and JE entries. They also use Workato for Coupa integrations, syncing POs with their internal database for reconciliation and BI reporting. With Workato handling data transfers between systems, their lean six-person team focused on delivering business value without custom code or API management, crucial for their public fintech company. **What took six months to build in Boomi, and failed, was achieved with Workato in a single month.**

The Workato Advantage:

- **5-6x faster agility** compared to Boomi
- **53% lower TCO** compared to Boomi and the professional services it required
- Books **closed 8 hours faster** every month

"Workato gives my team peace of mind and gives the business time back to be more strategic"

Aniket Mane, VP Engineering

Workato Proprietary and Confidential



Orchestrating: Customer Experience

Connecting: Doordash, Punchh

Industry: Retail

Region: North America

Size: 8,000 employees

RaceTrac Transforms Retail Operations for Competitive Edge

The Challenge

Racetrack was facing low "foot traffic" to their retail locations, and sought to transform the revolving door experience for the retail side of the business to become more customer centric. This in turn will aim to provide Racetrac with a competitive advantage and an alternative way to shop the inside of the store.

The Solution

Racetrac's solution was to automate the delivery of the retail side of the business, while integrating with marketing operations and a customer rewards loyalty program.

The Workato Advantage:

- Growing revenue stream – sell more groceries and family-size goods
- Faster shopping & checkout process
- Better rewards for loyal customers

"Racetrac Petroleum is always trying to meet customers where they want to be met...our hope is that guests who were more strictly gasoline guests previously and maybe high gas users can now earn points and become 'inside' guests as well."

Natalie Morhouse, President



Orchestrating: Finance Operations, Analytics Operations

Connecting: Salesforce, Workday, Stripe, Adaptive Insights

Industry: Social Platform

Region: North America

Size: 600 employees

Nextdoor Moves Toward Autonomous Operations in Finance, Analytics, and HR

The Challenge

Nextdoor lacked an enterprise-grade HRIS or ERP system and struggled with high operational inefficiencies, manual data processes, and disconnected systems. This resulted in delayed financial closes, recruitment bottlenecks, and billing errors that hindered scalability and growth.

The Solution

Nextdoor implemented Workato to connect its systems, orchestrate data workflows, and automate manual tasks across finance, HR, and analytics. The solution integrated seamlessly with Workday and other adjacent applications like Salesforce, Prism Analytics, and Looker to streamline processes and drive automation.

The Workato Advantage:

- **22% Faster Month-end Close:** Reduced financial close from 9 to 7 days.
- **240 Hours Saved Annually:** Automated manual customer updates and data tasks.
- **Real-time Recruiting Analytics:** Empowered HR teams with on-demand dashboards to track recruiter performance.



Orchestrating: Legacy System Migration

Connecting: Sales

Industry: Entertainment

Region: North America

Size: 4,200 employees

MGM Migrates from Legacy System to Workato

The Challenge

Legacy on-premise systems resulted in disjointed and inefficient processes. MGM was unable to calculate important metrics like content performance with precision. Moving content through MGM's supply chain was slow and risked missing deadlines.

The Solution

MGM migrated to a cloud platform, adopted business-friendly SaaS technologies, and orchestrated much of the data transfer between these systems with Workato.

The Workato Advantage:

- Eliminated 2500 manual spreadsheet processes
- Improved business decisions with insights driven from advanced analytics from across 2.5M records synced with IP data
- Faster, more streamlined content supply chain (i.e. 115 mission critical recipes, reduced key studio capabilities from 1 hour to <1 min)
- Increased transparency and trust in data.

"Workato is a core product for us that allows us to do the data transformation from one system to the other without breaking the data flow."

Manoj Parakkal, Senior Architect



Orchestrating: Finance Workflows

Connecting: Coupa, NetSuite, Kyriba, Workiva, Workday

Industry: Entertainment

Region: North America

Size: 1000 employees

SeatGeek Drives Financial Automation With Workato

The Challenge

SeatGeek, a leading global ticketing platform, faced significant challenges in managing the financial complexity of primary and secondary ticket sales. With millions of dollars in transactions flowing through various partners, sellers, and clients, manual processes led to inefficiencies, high error rates, and scalability issues.

The Solution

SeatGeek adopted Workato to build a robust financial automation framework, streamlining workflows across billing, revenue recognition, and payments. The integration of Workato with systems like NetSuite, Kyriba, and custom-built applications eliminated bottlenecks, ensuring accuracy and scalability.

The Workato Advantage:

- **Automated \$2B+ in payouts** across clients and sellers annually
- **Saved 5,000 hours per year** by eliminating manual processes
- **Reduced month-end close by 4 days**, improving operational efficiency



VILLAGE ROADSHOW

Orchestrating: Legacy System Migration

Connecting: SAP

Industry: Entertainment

Region: APJ

Size: 5,000 employees

Village Roadshow Modernizes Integrations with Workato

The Challenge

Village Roadshow struggled with an outdated integration platform, leading to high costs, slow market responses, and frequent outages during peak seasons. Costly, rigid integrations offered little control over governance and security, putting revenue and reputation at risk.

The Solution

Workato integrated the guest experience and POS systems to eliminate intermediaries and streamlined SAP data exchange using existing connectors. Workato also built custom integrations to improve property management workflows and enhanced security with encryption protocols to safeguard payment data.

The Workato Advantage:

- **Zero outages** post-implementation, even under 4x historical load.
- **66% reduction in operating costs**, with work previously done by 5 integration developers now handled by half a DevOps team member.
- **4x increase in speed to market**, migrating 3 divisions to Workato in 12 weeks

"No spikes, no outages. Workato didn't even break a sweat with major blockbuster releases like Barbenheimer, the biggest weekend for Australian cinema since 2019."

Arul Arogyanathan
Chief Information Officer

Workato Proprietary and Confidential

Manufacturing & Industrial

(segment agnostic)

Transform Manufacturing with Workato



6500

hours saved each month through
Workato.

Key Apps Connected



logitech

3x

productivity, going live with solution
in 9 weeks vs. 6 months.

Key Apps Connected



3

separate departments using
Workato for their automations.

Key Apps Connected





Orchestrating: eCommerce Platform Migration

Connecting: Oracle, Snowflake, Anaplan, Salesforce, TransferWise, UPS

Industry: Manufacturing

Region: North America

Size: 8,200 employees

Logitech's Journey to Efficiency & Satisfaction

The Challenge

Logitech's original customer support platform, running on Salesforce APEX, powered by Azuqua, was too slow and expensive due to Salesforce Lightning. Additionally, traditional iPaaS solutions were pulled due to Okta's acquisition, necessitating a change in the support system architecture.

The Solution

Logitech centralized product, pricing, and transactional data from Snowflake and Oracle into Anaplan for sales planning. Additionally, they bridged Salesforce and customer accounts to eliminate manual data management. Finally, Logitech automated ticket creation from Sunshine conversations and attached it to a Zendesk ticket. With Workato, Logitech were able to go live in 9 weeks versus 6 months.

The Workato Advantage:

- **50% better agent utilization;** convert 50% web-based volume through chat
- **3x higher productivity**
- **Happier customers & employees** resulting from faster high-value support

"We wanted to be able to provide something that's completely different to innovate and create better experiences, [and ultimately] enhance the augmentation of the brand."

**Massimo Rapparini,
Chief Information Officer**

Workato Proprietary and Confidential



Orchestrating: Company Acquisitions and Employee Onboarding

Connecting: Workday, Servicenow, Box

Industry: Manufacturing

Region: North America

Size: 21,000 employees

Broadcom's Rapid Growth with Workato

The Challenge

Forthcoming acquisitions and growing demands on IT was a forcing function for IT to reconsider how they could make processes more efficient and accurate without adding headcount.

The Solution

Adopt the Workato automation platform to not only replace manual tasks with automation, but to help orchestrate newly-designed processes, specifically around onboarding/offboarding and compliance training. With Workato, Broadcom experienced a multitude of benefits, including bringing down the time to fulfill VPN requests from 2+ hours to 9 seconds.

The Workato Advantage:

- **6,500 hours** saved per month.
- Increase in workforce by 43%, but the **IT team didn't need to grow** to meet increased needs due to automation.
- Sped up VPN request fulfillment process by **800x**.

"Right now, we have over 300 automations running between 105,000 to 120,000 jobs a month...we save about 6,500 human hours a month. That is efficiency."

Stanley Toh
Head of Enterprise End-user Services & Experience



Orchestrating: Purchase Orders and Invoices

Connecting: NetSuite, Marketo, Shopify, Google Workspace

Industry: Packaging and Containers Manufacturing

Region: APAC & UK

Size: 200 employees

BioPak's Rapid Growth with Workato

The Challenge

BioPak's sales team was overwhelmed by the manual processing of hundreds of purchase orders and invoices daily—sometimes thousands weekly. Each order could take up to 30 minutes to process, leading to significant inefficiencies and bottlenecks.

The Solution

Seeking a more efficient approach, the IT organization implemented Workato and document processing to automate the handling of purchase orders and invoices. Data was seamlessly passed from the document processing tool into Workato to handle a growing volume of orders more efficiently with minimal manual intervention.

The Workato Advantage:

- **90%** faster order and invoice processing
- **~450** hours saved for the sales team each month
- Unlocked **efficient growth**, now more orders can be handled by the existing sales team members

"We were able to cut down the processing time by 90% using Workato. It was truly amazing to see the scalability of using Workato as an automation and integration platform."

Jan Cerny
Chief Technology Officer



Orchestrating: HR and Sales Processes

Connecting: SAP SuccessFactors, Ceridian Dayforce, Greenhouse, Beeline, Azure AD

Industry: Automotive

Region: North America

Size: 6,800 employees

Lucid Motors Builds a Seamless Sales-to-Fulfillment Pipeline With Workato

The Challenge

Lucid Motors faced integration challenges in HR and sales operations, with manual processes causing data inconsistencies across systems like SAP SuccessFactors, Greenhouse, and Ceridian Dayforce. Their sales pipeline relied on a restrictive proprietary platform, limiting scalability and internal control.

The Solution

Lucid leveraged DynPro to implement Workato as their orchestration backbone, automating synchronization across HR systems and streamlining their sales-to-fulfillment pipeline. This API-driven strategy ensured real-time data accuracy and automated workflows in sales orders, customer management, payroll, and workforce operations.

The Workato + DynPro Advantage:

- Eliminated over **90%** of manual HR and Sales processes.
- **80%** reduction in order processing errors.
- Scalable integration architecture is supporting an anticipated **2x** growth.

"The Workato integration platform has transformed our sales operations from manual, disconnected processes to a seamless, automated pipeline. Our customers now experience the premium, technology-forward service that defines the Lucid brand."



Orchestrating: Order-to-Cash, API Management, ESG data, Real-time Route Management, and Cost Optimization, AI/ML

Connecting: Salesforce, SAP, AWS

Industry: Supply Chain Management, SFTP

Region: North America

Size: 300 employees

Network Distribution Accelerates Innovation

The Challenge

The Network Distribution team relied on a legacy Mulesoft platform with 65 integrations, which created heavy maintenance and put critical order-to-cash and logistics processes at risk. Slow development, opaque error handling, and limited visibility hindered issue resolution. Performance bottlenecks—like an 18-hour annual batch—added strain. Complex integrations across Salesforce, SAP, AWS, and APIs lacked actionable insights, while high maintenance and limited enablement restricted innovation, all amid pressure to modernize without disrupting operations.

The Solution

The team implemented Workato with Dynpro as the system integrator to re-architect key processes for scalability. The migration was completed four weeks early with zero disruption, successfully moving all integrations and building new APIs. Workato reduced an annual batch process from 18 hours to 45 minutes, enhanced error handling and monitoring for greater visibility. While Workato insights enabled process improvements and empowered client-led innovation, Dynpro contributed by streamlining user interface workflows and improving operational efficiency.

The Workato + DynPro Advantage:

- Migrated **65+** integrations off of MuleSoft to Workato in just **3** months
- Reduced integration costs
- Significantly improved order-to-cash among other workflows
- Increased efficiencies, e.g. **96%** faster annual batch processing



Industry	Distribution
Revenue	\$1B
Region	USA
Employee size	2000

Branch Office AI Agent to revolutionize the Distribution industry

The Challenge

USES I is having a resource drain in its branch offices which could result in poor customer experience

The Solution - Digital Branch Office Clerk

- Acts as a technical advisor
- Provides personalized service based on customer's history that is available in their CRM ([proton.ai](#))
- Lookup the inventory and create a complete order in their ERP (Eclipse)
- Propose alternative products as needed
- Link an order to helpful training content



- Inventory lookup
- Order shopping cart
- Create order
- Customer lookup

Financial Services

Modernize and Transform with Workato



6x

faster development times of automations.

Key Apps Connected



1000+

recipes currently in production across 5 teams.

Key Apps Connected



84%

reduction in merchant acquisition timeline.

Key Apps Connected



**Orchestrating:**

Azure migrations, Data Ops, API Management, BPA, and RPA.

Connecting: Salesforce, Workday, ServiceNow, SQL Server, Snowflake, Oracle

Industry: Financial Services

Region: North America

Size: 6,000 employees

Providing Customer Value

The Challenge

Voya, an ING subsidiary, was facing a number of issues; poor customer experience on its website, a large-scale cloud migration to Azure, many on-prem legacy scripts, and heavy ITSM processes, leading to heavy financial and time-related expenses.

The Solution

Through Workato, Voya adopted real-time integration with prebuilt capabilities, democratizing automation beyond IT. This scalable approach using on-prem agents, APIs, data hubs, and events enhances customer experience, reduces back-office costs, and allows staff to focus on higher-level tasks.

The Workato Advantage:

- 70%+ connected with on-prem agent.
- 1000+ recipes in production spread across multiple functions (data warehouse integration, ITSM, sales and marketing, and finance).
- 100s of apps and data connected.



Orchestrating:
Growth Processes

Connecting: Hubspot,
Salesforce, Snowflake

Industry: Financial Technology

Region: North America

Size: 1,000 employees

How Ramp Supercharged Efficiency

The Challenge

Ramp was facing multiple challenges across multiple teams that were hampering their growth. Specifically, they were struggling with manual errors in campaign creation, delays caused by native Hubspot/Salesforce dependencies, and difficulties in debugging.

The Solution

Ramp's vision was to move on from their point-to-point integration solution and pivot to an API-led approach, ultimately building to a scalable logging framework with superior retry processes. They were able to achieve that through Workato's shortened build time, numerous connectors, and SQL Collection.

The Workato Advantage:

- Reduced time to generate opportunities by 97%.
- Decreased L1 tickets by 80%.
- Accelerated debugging process, making it 12x faster.

"Through Workato, we were able to transform what was a 150 step process using Node JS Block into a 25 step process using SQL, leading to a significant increase in efficiency."

Kunal Singh
Biz Systems Engineering Lead



Orchestrating:
Customer Onboarding

Connecting:
Salesforce, Docusign

Industry: Financial Technology

Region: North America

Size: 7,000 employees

Bread Financial Supercharges Customer Onboarding

The Challenge

Bread Financial's Revenue Ops team, supporting multiple departments, faced significant challenges in acquiring and managing customer information effectively. Manual processes, disparate systems, and lack of data integration made it difficult to maintain a cohesive view of customers, hindering scalability and efficiency.

The Solution

Bread Financial leveraged Workato's advanced connectors and community recipes to automate workflows, replacing manual handoffs between teams (e.g., sales, compliance, legal, implementation, and success). They implemented a robust API-led approach, streamlining data movement across five systems and automating customer onboarding processes.

The Workato Advantage:

- Reduced customer onboarding time by 84%.
- Eliminated manual data entry, saving 30 minutes per customer for sales reps.
- Enhanced scalability and customer acquisition capabilities.

"If we didn't go down this journey, we wouldn't have the opportunity to expand our business in this short amount of time."

Kristin Fretz
Director of RevOps

Healthcare

(segment agnostic)

Unlock Speed and Power with Workato



30%

boost in Virtuity's team productivity through Workato.

Key Apps Connected



⋮ one medical

8000

hours saved in One Medical's hiring process annually.

Key Apps Connected



100%

HIPAA and OSHA compliance by integrating HR system with Salesforce.

Key Apps Connected



MCKESSON

F FRESENIUS

GILEAD

labcorp

KAISER PERMANENTE



Memorial Sloan Kettering
Cancer Center



Orchestrating: Digital Transformation

Connecting: Oracle HCM, NetSuite, Taleo, Teams

Industry: Healthcare

Region: North America

Size: 1,800 employees

Empowering Vituity With Workato

The Challenge

Vituity was facing a serious challenge. Their IT landscape was precarious, 300+ interfaces poorly cobbled together to support legacy and new cloud applications across the organization.

The Solution

Through Workato, Vituity standardized and centralized integration automation across the entire enterprise.

The Workato Advantage:

- Boost team productivity by 30%.
- Speed up the hiring process by 3+ weeks.
- Streamline workflows across all departments, including IT, HR, Finance, and more.

"Our vision is to integrate data across all the applications and reduce redundancy and get away from legacy applications as much as we can. We're planning to build a huge hub-and-spoke data architecture, where all of our systems will connect to Workato."

Reetika Singh, Senior Engineering Manager, Applications and Integrations

Education

(segment agnostic)



Orchestrating: Legacy Migration

Connecting: Banner, Slate, LSAC, Canvas, zoom, Cashnet, GU Data Warehouse, Salesforce, Evertrue, TeamDynamix, Onbase, etc.

Industry: Higher Education

Region: North America

Size: 3,000 employees

Gonzaga delivers integrations 60% faster with Workato

Gonzaga University implemented an Enterprise CRM and an iPaaS solution six years ago. However, after five years, they faced significant challenges with the original vendors. The CRM needed replacement, which was the catalyst to replace their incumbent iPaaS. They needed something with robust documentation, training, and a stable environment.

By switching from their legacy iPaaS to Workato, Gonzaga University:

- Cut integration creation time from **10 days to 4 days**
- Accelerated efficiency by **increasing the employees creating automations by 2X**, facilitating the onboarding of citizen developers
- Enhanced error detection and notification systems, significantly **reducing time spent on log analysis**

"Workato stands out for its quick adoption and exceptional support, enabling seamless integration with impressive speed and simplicity."

**Preeti Gosavi,
Integrations Architect**



CSU GLOBAL

Orchestrating: Legacy Migration

Connecting: CampusNexus,
Canvas, Salesforce

Industry: Higher Education

Region: North America

Size: 650 employees

CSU Global Reduces Enrollment Setup Time by 96% with Workato

The Challenge

CSU Global faced challenges with fragmented student data across multiple systems. Their legacy solution required up to two weeks for enrollment setup and had limited flexibility, impacting their IT department and academic staff. CSU needed a faster, more reliable integration platform to streamline their Student Information System (SIS) and Learning Management System (LMS) workflows.

The Solution

By switching to Workato, CSU Global automated key workflows between their SIS and LMS, streamlining course creation, faculty assignment, and student enrollment. Workato's intuitive platform allowed the team to take full control of their integrations, enabling faster setup times and improved system reliability.

The Workato Advantage

- 96% reduction in enrollment setup time.
- **Increased efficiency** with automated workflows, reducing IT interventions
- **Enhanced confidence and ownership** of the integration architecture, with the team fully trained and operational within six months

"Workato will get us to market very quickly... porting legacy stuff into a more manageable architecture. In 6 months we're finally trained on it. We own it. We can do it."

Brian Braido,
Assistant Director, Software & Systems Integration

Replace Boomi Case Studies (Enterprise)



Orchestrating: Legacy Migration

Connecting: Banner, Slate, LSAC, Canvas, zoom, Cashnet, GU Data Warehouse, Salesforce, Evertrue, TeamDynamix, Onbase, etc.

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**Preeti Gosavi,
Integrations Architect**



Orchestrating:
Finance Transformation, APIM,
Boomi and Zapier replacement

Connecting: NetSuite, Coupa,
Airflow

Industry: Retail

Region: North America

Size: 2,500 employees

How ThredUp Accelerated Beyond Boomi

The Challenge

The integration team at ThredUp used Boomi for two years but found it too complex and difficult to scale because it required specialized resources, the team had to rely on expensive professional services, and custom coding in NetSuite. They sought a low-code solution to streamline processes, as manual Excel-to-NetSuite postings during month-end closings posed inefficiencies and compliance issues. Zapier provided basic automation but lacked scalability and ownership, adding further challenges for the team.

The Solution

With Workato the team **no longer requires professional services** to manage integrations with NetSuite and their internal app to automate monthly close processes, including GL accounts and JE entries. They also use Workato for Coupa integrations, syncing POs with their internal database for reconciliation and BI reporting. With Workato handling data transfers between systems, their lean six-person team focused on delivering business value without custom code or API management, crucial for their public fintech company. **What took six months to build in Boomi, and failed, was achieved with Workato in a single month.**

The Workato Advantage:

- **5-6x faster agility** compared to Boomi
- **53% lower TCO** compared to Boomi and the professional services it required
- Books **closed 8 hours faster** every month

"Workato gives my team peace of mind and gives the business time back to be more strategic"

Aniket Mane, VP Engineering

Workato Proprietary and Confidential

precisely

Orchestrating: Order to Cash, post-merger acquisition, consolidation

Connecting: NetSuite, Salesforce

Industry: Data Software

Region: North America

Size: 3,000+ Employees

Infrastructure Consolidation Leads to \$1M in Cost Savings

The Challenge

After the spin-off from IBM, Kyndryl's GTM teams managed 150+ out of 1,800 inherited sales and marketing applications, many misaligned with business strategies, creating silos and inefficiencies. High infrastructure overhead (\$1M+ per month) and lack of application ownership compounded issues, making security and governance unsustainable.

The Solution

The CIO initiated a project to address these problems with a two year timeline to simplify their technology landscape, which included migrating from legacy systems, realigning to a strategic platform, reducing costs, and integrating 30+ applications for sales and marketing.

The Workato Advantage:

- Increased **speed of integration** development by **80x**
- Improved **business efficiency** by cleaning up 30 overlapping practices
- **Reduced the cost** of infrastructure



"Workato's support blows Boomi out of the water."
"Boomi's (connector support) is less comprehensive than Workato"

Dave Shuman | Sr. Director Data Operations & Enterprise Architecture

Replace - Mulesoft Case Studies (Enterprise)

MuleSoft Migrations



3 Weeks

To build and deploy, compared to 2-3 months previously

Orchestrating:

IT, Product, Finance, and HR

Connecting: Workday, Coupa, Atlassian Community API, Jira, Trello, and internal AI model

Delivering: 15 days to first value



6,500 Hrs

Saved every month after switching to Workato

Orchestrating:

HR & People Operations

Connecting: Okta, Workday, ServiceNow, Active Directory, Box, Slack, and others

Delivering: 25 days to first value



Crypto Wallet Company

50%

Reduction in build and deployment times

Orchestrating:

Organization-wide

Connecting: Netsuite, Workday, Snowflake, Greenhouse, Kyriba, Workiva, Anaplan, OneSource

Delivering: 37 days to first value



Orchestrating: ERP Migration

Connecting: Coupa, SAP Concur, Oracle, Workday

Industry: Software

Region: North America

Size: 12,000 employees

Atlassian Accelerates ERP Migration

The Challenge

Atlassian faced significant hurdles in their ERP migration project. Key challenges included managing over 800 NetSuite customizations, navigating external vendor dependencies, and ensuring data integrity. Limited visibility and slow development cycles with a MuleSoft further hindered progress.

The Solution

Atlassian began to transition from a legacy iPaaS solution to a scalable and flexible Workato platform. With the Workato platform, Atlassian delivered 73+ integrations handling complex workflows and automated finance processes such as AP invoice integrations, payroll journal synchronization, and general ledger balance extraction.

The Workato Advantage:

- Company wide, Workato saves Atlassian 100K+ hours per year
- Accelerated full ERP migration by 40%, from 15 down to 9 months.
- 67,000 hours saved across Atlassian's finance organization.
- Improved customer data refresh time by 90%.

"We've reduced ERP tech debt by 98%, cutting down from over 800 scripts to just 15. Fiscal closures are now 63% faster, shrinking from 8 days to only 3 for us."

Daivish Shah, Intelligent Automation Platform Architect

Enterprise Leadership at **ATLASSIAN**

"The transition from Mulesoft to Workato helped **meet the scalability needs of a \$10B business.**"



Daivish Shah

Intelligent Automation Platform Architect
at Atlassian

171 Systems Connected
2,130 Builders Trained
5,214 Active Recipes

886.7 Million
Annual transactions



Mulesoft Replacement Case Studies

Key Challenges

- Huge employee growth challenged IT and HR to innovate its traditional processes
- Manual processes slowing down the business

Use Cases

- Extending intelligent automation across Atlassian
- Centralize a team within IT dedicated to intelligent automation using Workato as a lynchpin technology

Business Impact

- 100,000 hours saved from intelligent automation
- New product insights strengthen offerings
- Happier Atlassian customers and employees
- Employee experience has dramatically improved; HR can deliver responses to employee inquiries in minutes
- Faster turnaround time on customer requests

“

This is a space where IA, when applied to the [Workato] automations, can...tackle ideas which normally would not be possible.”



Vinayak Varma
IT Development Senior
Team Lead

Mulesoft Replacement Case Studies

Key Challenges

- Tracking lead activity from emails
- Required expensive development staff
- Inability to scale company wide as Mulesoft is a high-code platform which requires high technical abilities

Use Cases

- Easy and faster access to conversations with leads in CRM
- Faster revenue recognition with CPQ integrations

Business Impact

- Streamlined Quote Approval Process
- Decreases Quotes with Pricing Errors
- 10X Faster Quote Generation
- Instant Leads Data Sync
- Easier Identification of Leads
- Increase Sales/Revenue

“

Our development lifecycle is halved, even with half of our previous manpower and resources.”



Greg Hetrick

Chief Technology Officer

Mulesoft Migration Story

Problem

Workato's customer faced scalability limitations with their existing legacy iPaaS provider due to issues with speed of development, cost & complexity of on-prem ownership, and ease of use by decentralized teams

Solution

Workato provided a solution that allowed rapid scale with supporting governance to meet the demand of decentralized business teams while lowering total cost of ownership and meeting the strict security requirements of their industry

Migration

Workato PS led a joint PS/partner strategy to migrate ~75 integrations - Workato PS migrated the initial set of critical integrations and enabled the partner on Workato best practices to complete the remaining integrations

Results

The full migration completed on-schedule in under 6 months, ahead of the customer's contract renewal with their previous iPaaS provider



Crypto Wallet Company

A U.S. based FinTech company that operates in 100+ countries with regional headquarters in Asia & Europe



First value achieved within **37 calendar days**. Full migration complete within 6 months



Reduced build and deployment **time by 2X**, allowing engineers to focus more on high judgement tasks



Reduced defect resolution time by **78.6%** and required infrastructure support by **66.7%** via Cloud-based self-service platform

Customer Testimonials

“

When we did the live session with Workato, I discovered that I don't need to be a developer to do it, unlike MuleSoft.”

“

Why code with Mulesoft when everyone can build integrations in English.”

“

The Ah-Ha moment came when I realized I can take two spreadsheets, slam them together, and put it anywhere I want. We figured that out in 15 mins in Workato. Even if I have to buy Mulesoft, we'll still buy Workato!”



Customer Testimonials

“

What you can build on Workato in days will take you months to build in MuleSoft.”

gusto

“

Despite MuleSoft offering their subscription for free at renewal, we started using Workato because they could not get things to work in MuleSoft.”

DATASTAX

“

“What Workato gives us is speed over MuleSoft.”

**Helen
of Troy**

Village Roadshow



Accelerating Business Outcomes:



VILLAGE ROADSHOW



4x

Speed to Market

3 divisions migrated to Workato in just 12 weeks

Industry: Entertainment
Size: 5,000+ employees
Founded: 1954



66% ↓

Operating Costs

The work of 5 specialized developers done by half of a DevOps team member & lines of code reduced by 98%

Orchestrating: Legacy Integration System Migration



0

Post-Implementation Outages

Even when stressed-tested against **4X** historical peak load

Handling: Over 10 million API calls per month



Challenge

- Query fatigue: Manual, repetitive inquiries draining team time
- Fragmented data: Scattered across disparate systems, slow decision-making
- Limited automation: Focused on tasks, lacked context & natural interaction

Solution

- Adopted an agentic approach to accelerate revenue and productivity
- Established IT as Agentic CoE, teaming with functional experts
- Built purpose-specific agents using agile, iterative implementation

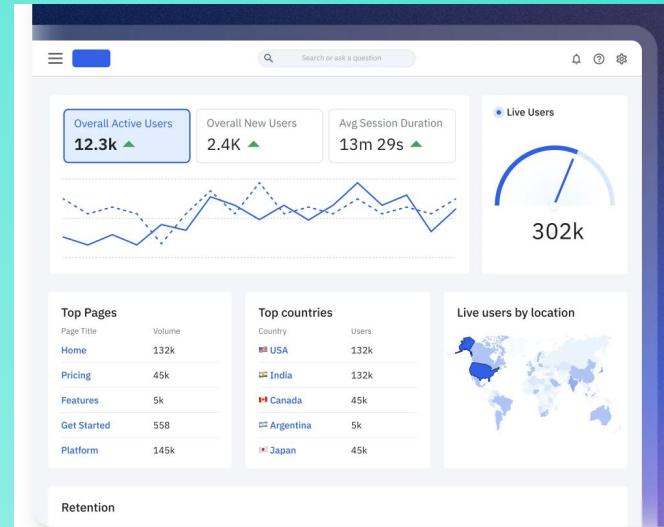
How Amplitude Saved 4,500+ Hours with AI-Powered Agents

"In just two and a half months, Amplitude rolled out five agents covering IT, finance, procurement, marketing, and HR. These agents answered over 60 complex queries, ran 24/7, and saved more than 4,500 hours—without adding headcount."

5 AI Agents deployed across IT, Finance, Marketing Ops, and more

60+ queries answered via 24/7 AI-powered agents

4,500+ hours saved by automating routine work



Devesh Gupta

Director, Enterprise Technology, Amplitude

Agent Architecture Blueprint



24/7
Available
Agents

