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workato

The relentless pursuit of making the complex simple

Summary & Overview

What are Customer's Value Drivers?

- These are factors that a prospect is likely proactively searching for or needing
- Value Drivers directly address customers' most pressing business challenges & pains
- Value drivers are top-of-mind topics that exist with or without Workato
- Value Drivers are typically associated with *increased revenue, decreased cost, reduction in risk*
- Value drivers support a consultative approach to selling

Customer Value Drivers help drive consultative conversations using:

- ***Current State*** and the ***Negative Effects*** & Pain of that state.
- ***Desired State***, and the ***Specific Business Outcomes*** that come from that state.
- The ***Solution Requirements***, and the ***Metrics*** to prove the success of the solution.
- How ***Workato Does 'It'***, and how ***Workato does 'It' Better*** than others.
- ***Proof Points***, such as customer testimonials & case studies (ref. example here)
- Discovery Questions, in order to drive a consultative conversation.

What are Workato's Differentiators?

- **Differentiators** help influence a buyer's decisions - technical, business, financial
- **Differentiators** drive value for the customer and are defensible
- Workato defines Differentiation in 3 categories:
  - ***Unique*** - only Workato has this
  - ***Comparative*** - others have this feature/function, yet Workato's is better
  - ***Holistic*** - high-level attributes that give our customers faith in us

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Customer Value Drivers

Enterprise Agility

- The ability to innovate quickly, efficiently, and reduce time to first value
- Company-Wide, yet governed, access to modern capabilities historically requiring a high level of technical/coding expertise

Efficiency & OrCA

- Do More with Less.
- More Output, Less Baggage
- Automate the Mundane

Risk Reduction

- Company-Wide Orchestration without Shadow IT
- Make GRC (governance, risk, compliance) a Team Sport (CISO targeted)

Revenue Growth

- Consistent, seamless experiences across the end-to-end customer journey that drive satisfaction and loyalty
- Operational Excellence Driving Revenue – Visibility into customer journeys, efficient processes, and rapid deployment of new digital experiences.
- AI-Enabled Revenue Growth – AI-powered personalization, real-time insights, and intelligent automation for upsell, cross-sell, and retention at scale.

Enterprise Agility

The ability to innovate quickly, efficiently, and reduce time to first value

Enterprise Agility Current State

Current state of the business.

We are looking for the undesirable things occurring that we can help solve for.

These are the typical things we see/hear

DIRECT CUSTOMERS

Legacy Technology Debt

- Outdated integration/automation tools still in place (SAP PI/PO, Tibco BusinessWorks, Microsoft BizTalk, IBM WebSphere, IBM WebMethods) that are technologically obsolete, complex to use, expensive to maintain, and increasingly difficult to staff
- Technical debt consuming resources that should be directed toward innovation

Uncontrolled Tech Stack Growth & Shadow IT

- Business units purchasing SaaS/cloud solutions faster than IT can integrate them, resulting in a fragmented, non-integrated technology landscape which is complex to use, expensive to maintain, and increasingly difficult to staff
- Shadow IT proliferating as departments seek their own automation and integration solutions outside IT governance
- **Lack of Business Visibility & Observability**
  - Disconnected, siloed data, processes, and people across the enterprise
  - No unified orchestration within or across departments and business units
  - Limited real-time insights into business operations, threats, opportunities, and anomalies

IT Capacity & Delivery Constraints

- Long project backlogs with slow progress; innovation ideas rarely prioritized
- Limited IT resources (people, budget, technology, established processes) forcing difficult trade-offs between running the business and innovating the business
- Traditional IT-reliant approaches to orchestration creating bottlenecks that prevent on-time, on-expectation project delivery

AI Readiness Gap

- CEOs and Boards demanding rapid AI adoption with measurable business results (improved KPIs)
- IT not ready in terms of architecture, infrastructure, skills, or understanding of AI/agentic technologies and options
- No clear path from AI proof-of-concept to production-scale deployment
- Multiple AI pilots that never reached production due to integration, governance, or scalability challenges
- Multiple departments experimenting with different AI agent solutions, creating new silos and governance gaps
- No standard way to connect AI agents to enterprise systems, data, and workflows securely

These AI readiness challenges typically manifest across four common patterns:

1. **"AI for All"** — Making AI (e.g., agents, assistants, LLMs, ChatGPT, Claude and the likes) available to everyone in the organization:
   - Can't connect to all enterprise systems needed for complete workflows
   - Lacks business context and process understanding

	2. **"Citizen AI Dev"**— Empowering business users to build their own AI solutions: ○ Business users' AI solutions can't take action or update core systems—only answer questions ○ Lack connectivity and permissions to execute real workflows and business processes 3. **"Departmental AI"** — Individual departments building their own AI solutions independently: ○ Inconsistent implementations—not accurate, consistent, or predictable ○ Duplication and technical debt from fragmented approaches 4. **"Custom Development"** — IT building AI infrastructure and solutions from scratch: ○ Months to build connectivity infrastructure per agent ○ High maintenance burden for custom solutions **EMBED CUSTOMERS** **Legacy Technology Debt** ● Natively built, static integrations, built bespoke by engineering and/or professional services teams. ● iPaaS use that primarily & exclusively focuses on solving for simple, shallow use cases or requires deep technical expertise and high operational overhead. **Uncontrolled Tech Stack Growth & Shadow IT** ● Technical debt created by different solutions across engineering, partners and professional services. **IT/ENG Capacity & Delivery Constraints** ● Long project backlogs with slow progress; innovation ideas rarely prioritized ● Limited ENG/IT resources (people, budget, technology, established processes) forcing difficult trade-offs between running the business and innovating the business **AI Readiness Gap** ● CEOs and Boards demanding rapid AI adoption with measurable business results (improved KPIs) ● IT/ENG/Product not ready in terms of architecture, infrastructure, skills, or understanding of AI/agentic technologies and options ● No clear path from AI proof-of-concept to production-scale deployment ● Multiple AI pilots that never reached production due to integration, governance, or scalability challenges ● Multiple departments experimenting with different AI agent solutions, creating new silos and governance gaps ● No standard way to connect AI agents to enterprise systems, data, and workflows securely **Lack of Business Visibility & Observability** ● Disconnected, siloed data, processes, and people across the enterprise ● No unified orchestration within or across departments and business units ● Limited real-time insights into business operations, threats, opportunities, and anomalies
Enterprise Agility Negative Effects	**DIRECT CUSTOMERS** **From Legacy Technology Debt** ● High and increasing IT spend on monitoring, management, administration, and maintenance of obsolete systems ($ spend, % of IT budget)

The bad things that result from the current state. Expressed as operational or financial pains/outcomes. **These are the typical things we see/hear**	• Low ROI and IRR on technology transformation projects due to extended timelines (ROI %, IRR %) **From Uncontrolled Tech Stack Growth & Shadow IT** • Rising operational costs from managing fragmented, redundant technology ($ spend, cost per integration) • Audit findings, security incidents, and compliance violations from ungoverned shadow IT (# of audit findings, # of incidents, # of violations) • Data error rates and reconciliation time due to disconnected systems (error rate %, hours spent on reconciliation) **From IT Capacity & Delivery Constraints** • Lost opportunity cost from growing project backlog ($ value of delayed projects) • Low percentage of delivered projects vs. project pipeline (% delivered) • Extended time-to-delivery for IT projects, delaying business initiatives (days/weeks to delivery) **From AI Readiness Gap** • Wasted investment in AI pilots that never reach production ($ spent on failed pilots, # of failed pilots, wasted executive time) • No measurable ROI from AI investments despite significant spending (ROI %, $ opportunity cost, board credibility impact) • Loss of competitive advantage as competitors deploy AI at scale (market share %, $ lost revenue, competitive position) • Limited AI adoption, employees can retrieve information but can't automate work (% employee adoption, productivity gains unrealized, FTE hours not saved) • Shadow AI proliferation creating ungoverned security and compliance risks (# ungoverned AI projects, $ risk exposure, audit findings) • AI agent sprawl across departments with duplicated efforts and inconsistent experiences (# redundant solutions, $ wasted spend, CSAT decline %) • Extended development timelines building custom AI connectivity per use case (months to production, developer weeks per agent, $ cost per integration) • High maintenance burden for custom-built AI solutions as APIs and systems evolve (developer hours annually, $ ongoing maintenance cost) • Board and executive pressure to demonstrate AI business results without infrastructure to deliver (credibility risk, executive turnover risk) **From Lack of Business Visibility & Observability** • Slow response time to business threats, resulting in lost revenue (response time in days/hours, $ lost revenue) • Errors, anomalies, and compliance violations discovered only after significant impact (time to detection, $ cost of impact) --- **EMBED CUSTOMER** **From Legacy Technology Debt** • Excess time is spent managing and maintaining enterprise level integration requests from customers, slowing the time to market for new/updated integrations. **From Uncontrolled Tech Stack Growth & Shadow IT** • Time to deploy new integrations due to extensive and growing backlog of integrations

	• Total revenue tied up due to integration backlog **From Capacity & Delivery Constraints** • Lost opportunity cost from growing project backlog ($ value of delayed projects) • Low percentage of delivered projects vs. project pipeline (% delivered) • Extended time-to-delivery for IT/product projects, delaying business initiatives (days/weeks to delivery) • Lost opportunities and increased risk customer churn due to delayed delivery times and ever-growing integration roadmaps. **From AI Readiness Gap** • Wasted investment in AI pilots that never reach production ($ spent on failed pilots, # of failed pilots, wasted time from expensive resources, employee distractions) • No measurable ROI from AI investments (ROI %) • Loss of customer trust or brand reliability due to a slow & immature rollout of AI initiatives **From Lack of Business Visibility & Observability** • Slow response time to business threats, resulting in lost revenue (response time in days/hours, $ lost revenue) • Errors, anomalies, and compliance vioations discovered only after significant impact (time to detection, $ cost of impact) • Slow response times to errors or outages impacting customers can lead to lost revenue, a drop in NRR, a competitive slip in the market.
Enterprise Agility Desired State Paints a picture of what life could be should the current state be solved. We can guide the prospect/customer to what we know is possible for them. **These are the typical things we see/hear**	**Technology Transformation at the Speed of Business** • Modern, consolidated tech stack that evolves with business needs, not a constraint on them • Technology transformation timelines measured in weeks, not years **Orchestrated Enterprise** • Unified orchestration of data, applications, processes, experiences, and AI agents across the enterprise • Integrated, non-siloed operations with real-time visibility and control **Company-Wide Innovation with Centralized Governance** • Micro (LoB, individual) and macro (enterprise-wide) iterative innovation at scale • Business and IT collaboration on innovation priorities • Decentralized execution with central oversight and governance **AI-Ready and AI-Enabled** • Clear path from AI proof-of-concept to production at scale with standardized deployment infrastructure • AI agents securely connected to enterprise systems, data, and workflows with enterprise-grade authentication, authorization, and audit logging • Universal AI connectivity across all enterprise systems with business context and process understanding built-in • Business users empowered to build AI solutions that execute real workflows and automate work — not just answer questions — within governed boundaries • Consistent, reliable, and predictable AI implementations across all departments and use cases with unified quality standards • Reusable AI connectivity infrastructure eliminating months of custom development per

	agent • Single platform approach replacing fragmented AI tools and reducing technical debt across the enterprise • AI solutions taking controlled, safe actions that drive measurable KPIs and business outcomes • Real-time visibility into AI agent performance, actions, and business impact across the organization
Enterprise Agility Specific Business Outcomes Goodness that results from the 'desired state'. Typically these are important to the 'economic buyer/committee'. Lays the foundation for quantifying a solution (think, ROI). **These are the typical things we see/hear**	**DIRECT CUSTOMERS** **From Technology Transformation at the Speed of Business** • Time to Market for new products and services (days/weeks, FTE hours, from ideation to launch) • % of projects delivered on/ahead of time (% on-time delivery rate) • Time to adapt/change (e.g., existing products/services/processes) to address new customer needs or unpredicted scenarios **From Orchestrated Enterprise** • % of Straight-Through Processing (STP) in business operations (% STP rate) • IT employee productivity (revenue per IT employee, $ per FTE) • Employee productivity across business units (output per FTE, revenue per employee) **From Company-Wide Innovation with Centralized Governance** • % of projects delivered outside core IT (% democratization rate) • Revenue from new products and services ($ revenue, % of total revenue) • Net Revenue Retention from improved customer and partner experiences (NRR %) **From AI-Ready and AI-Enabled** • Accelerated AI deployment from prototype to production (days vs. months to production) • Rapid experimentation and iteration on AI use cases (# use cases deployed per quarter) • Increased IT productivity redirected to innovation vs. maintenance (% capacity shift, FTE hours saved) • Higher AI adoption driving measurable productivity gains (% employee adoption, FTE hours saved) • AI agents automating complete workflows beyond information retrieval (% straight-through processing improvement) • Eliminated duplicated AI efforts across departments ($ savings from consolidated approach, % cost reduction) • Reduced technical debt and optimized costs from standardized AI infrastructure ($ maintenance savings, developer hours redirected) • Faster AI value realization meeting board expectations (weeks to measurable ROI, KPI improvements delivered) • Shadow AI mitigation with unified governance (# ungoverned projects = x, % compliance adherence = 100) • Maintained competitive advantage through rapid AI deployment (market share %, competitive win rate %) --- **EMBED CUSTOMERS** **From Technology Transformation at the Speed of Business** • Time to Market for new products and services (days/weeks from ideation to launch)

	• % of projects delivered on/ahead of time (% on-time delivery rate) • Time and effort required from ideation to deployment of innovation projects (days/weeks, FTE hours) **From Orchestrated Enterprise** • % of Straight-Through Processing (STP) in business operations (% STP rate) **From Company-Wide Innovation with Centralized Governance** • % of projects delivered outside core IT (% democratization rate) • Revenue from new products and services ($ revenue, % of total revenue) • Net Revenue Retention from improved customer and partner experiences (NRR %) **From AI-Ready and AI-Enabled** • % of AI-enabled processes successfully delivered on-time, on-budget, with quantifiable outcomes (% delivery success rate) • Number of AI agent projects reaching production beyond PoC (# in production) • Customer/Partner satisfaction (CSAT score, NPS score)
Enterprise Agility Solution Requirements The solution requirement(s) that are needed to alleviate the negative effects/pain of the customer to achieve the specific business outcomes. **These are the typical things we see/hear**	**SPEED - Time to Value** • **Rapid AI adoption without infrastructure burden** - Instant AI agent, applications and data connectivity via Enterprise MCP with 100+ pre-built servers, turning existing automations into agent-ready services in minutes • **Unified, extensible build experience** - Fast to learn for business users (some call it "low code"), powerful and high productive for expert developers. Enables business users to build and deploy automations while IT maintains governance and extensibility. • **AI-assisted development, testing, and optimization -** Intelligent guidance during workflow creation, suggesting best practices, identifying issues, and accelerating build time. Automated troubleshooting and optimization to reduce manual debugging. • **Reusable components and best practices -** Access to pre-built templates, connectors, and workflows from a community of experts. Ability to package and share successful automations across teams. **POWER - Capabilities to solve the broadest set of problems** • **Enterprise MCP for AI agent connectivity** - Fully managed MCP servers with enterprise authentication, authorization, and audit logging built-in, exposing business context and process logic for secure AI agent actions • **Unified Orchestration Platform** - Coordination of data, systems, processes, experiences, MCP and AI agents across the enterprise. Supports both event-driven and human-in-the-loop workflows, along with application and data integration, process automation, API management, event streaming, IDP, BPM, RPA, Event Streaming, Agentic patterns, B2B integration, and AI composition and integration. • **Universal connectivity** - Integrations - apps, databases, warehouses, LLMs, on-prem systems, etc, agents - with ability to integrate into existing data sources and systems, MCP skills and connectivity • **For Embed customers: Orchestration platform -** Powers coordination of data, systems, processes, experiences, MCP and AI agents across the enterprise. Supports both event-driven and human-in-the-loop workflows. Ability to fulfill every customer's unique complex integration requirements.

	SCALE - Grow with enterprise governance and reliability • **Agent-ready infrastructure -** Fully managed capabilities that turn existing automations into composable, agent-ready services. Policy-based governance, ensuring AI agents and automations operate within defined boundaries. • **Governed collaboration -** Supports cross-departmental teamwork with appropriate guardrails, roles, and controls. Enables business units to build autonomously while IT maintains centralized oversight • **Security and compliance -** Trust and security with auditable controls for regulatory requirements. End-to-end encryption and granular user access controls. • **Scalable architecture -** Cloud-native platform supporting company-wide implementation with centralized governance. Multiple deployment options (public cloud, private cloud, hybrid) based on security requirements.
Enterprise Agility Metrics These are the acceptance criteria for the Solution Requirements **These are the typical things we see/hear**	• Time to build, deploy and change (hours, not days or months). For example, developer productivity boost stemming from the AI-assisted toolset, or integrations/automations built after proper Workato platform enablement. • Developer ramp time. For example experienced integration developers are up and running in xx days, business technologists in "yy" days • Response time for opportunities/threats/anomalies and mistakes. For example, supply chain risk management: replacement of an unreliable supplier with alternatives takes place in xx-days • Democratization: number of builders (non-developers) that can build automations • Connect to <system X, Y, Z…> and display custom objects and custom fields with no development effort • Bot can integrate to two or more systems (e.g., Slack, Teams, Workplace) • Can automate across the spectrum of Enterprise Orchestration, i.e., data flows, API-fication, event processing, process flows, AI agents, and experiences across the apps
Enterprise Agility How Workato Does It **&** **Why Workato Does It Better** How Workato's solutions & services satisfy the solution requirements set forth by customer, and our competitive advantage **These are the typical ways we solve the customers'**	**SPEED - Time to Value** • **Workato Enterprise MCP** - 100+ fully managed MCP servers provide instant AI agent connectivity to enterprise systems with authentication, authorization, and audit logging built-in, no-code server composition enabling agents to reliably execute multi-step operations like *"extract invoice data and post to NetSuite"* or *"create maintenance work order in SAP."* **Why Better:** Competitors force customers to build and maintain their own MCP infrastructure. Workato turns existing automations into agent-ready skills in minutes, not months, with these key differentiators: MCP Gateway with runtime governance (rate limiting, quotas, scoped tokens), complete observability (dashboards, audit trails), verified user access, scoped access. Additionally, it enables Claude, ChatGPT, LangChain, and any agent framework to securely invoke prebuilt application connectors through standardized MCP interface without custom integrations. • **Workato Genies and AI assisted Development features** - Accelerator AI agents (Sales, IT, Support, HR, CX, Marketing, Security) that autonomously complete end-to-end processes across systems. **Why Better:** Microsoft copilots and Salesforce assistants only answer questions. Workato

pains	Genies execute complete workflows with built-in KPIs, governance, and human-in-the-loop controls, deploying in days instead of months. "AIRO™ and AI Copilots accelerate workflow creation by suggesting best practices, generating logic, identifying issues, and optimizing during build time, reducing manual debugging and enabling both technical and business users to build faster." • **Unified, Extensible Build Experience + Connectivity to 14,000+ Apps** - Intuitive visual builder for business users with full extensibility for developers, featuring intelligent, context-aware connectors that understand business logic and data models of each system. **Why Better:** Workato connectors expose hundreds of specialized actions per system (vs. basic CRUD), require zero maintenance (Workato handles API changes), and enable deployment in hours instead of months. Customers report 80% reduction in development time. For example, 1 action to create entire PO vs individual fields. Workato also provides a Connector SDK that enables rapid custom connector development, ensuring universal connectivity to any application, database, or API without waiting on vendor roadmaps or maintaining complex integration code. • **Workato GO** - Unified interface combining enterprise search, Deep Action™ orchestration, AI agent engagement, and performance monitoring. **Why Better:** Competitors require separate tools for search, chatbots, workflow execution, and monitoring. Workato GO delivers everything in one context-aware interface without tool-switching. • **Community Library + Recipe Accelerators** - Access to 900,000+ pre-built recipes, templates, and solution accelerators shared by Workato's global user base. **Why Better:** No other iPaaS vendor has this depth of shared expertise and pre-built solutions. Workato's community-driven innovation means customers can leverage proven workflows for common use cases, deploying in hours instead of building from scratch. • **For Embed Customers - Workato Enterprise MCP** - **Composable MCP Server** that provides instant AI agent connectivity to enterprise systems with authentication, authorization, and audit logging built-in. **Why Better:** Competitors force customers to build and maintain their own MCP infrastructure. Workato turns existing automations into agent-ready skills in minutes, not months. • **For Embed Customers -** Unified, Extensible Build Experience + Connectivity to 14,000+ Apps - Intuitive visual builder for business users with full extensibility for developers, featuring intelligent, context-aware connectors that understand business logic and data models of each system. **Why Better:** Workato connectors expose hundreds of specialized actions per system (vs. basic CRUD), require zero maintenance (Workato handles API changes), and enable deployment in hours instead of months. Customers report 80% reduction in development time. For example, 1 action to create entire PO vs individual fields. Workato also provides a Connector SDK that enables rapid custom connector development, ensuring universal connectivity to any application, database, or API without waiting on vendor roadmaps or maintaining complex integration code.

	• **For Embed Customers - Community Library + Recipe Accelerators** - Access to 900,000+ pre-built recipes, templates, and solution accelerators shared by Workato's global user base. **Why Better:** No other iPaaS vendor has this depth of shared expertise and pre-built solutions. Workato's community-driven innovation means customers can leverage proven workflows for common use cases, deploying in hours instead of building from scratch. **POWER - Capabilities to Solve the Broadest Set of Problems** • **Workato ONE Platform** - Single platform combining integration, automation, data orchestration, API management, and AI orchestration. **Why Better:** Organizations using AI Tools, RPA, ESBs, or traditional middleware manage 3-5 different tools. Workato delivers everything with one user experience, one governance framework, one operational model eliminating complexity. • **Composable Orchestration** - Direct connection to application logic, not UI screens. **Why Better:** Workato's composable approach adapts when applications evolve without breaking, and enables business users to build without deep technical skills. • **Cloud-Native Architecture** - Serverless, auto-scaling infrastructure with zero infrastructure management. **Why Better:** Workato's cloud-native, unified platform eliminates the complexity tax, delivering integration, automation, orchestration, and AI capabilities in one user experience versus utilizing 3-5 fragmented tools legacy approaches typically require. **SCALE - Grow with Enterprise Governance and Reliability** • **Agent Trust + Automation HQ** - Policy-based governance for AI agents and automations with centralized monitoring, granular RBAC, and workspace segmentation. **Why Better:** Competitors lack unified governance across automations and AI agents, creating compliance gaps. Workato provides one governance model for all capabilities with complete audit trails. As an example, Workato GEARS methodology and federated workspace model enable business units to build autonomously while IT maintains centralized oversight, supporting cross-departmental teamwork with appropriate guardrails, roles, and controls. • **Zero-Downtime Upgrades** - 700+ platform updates/year with no service interruption, no version management, full backward compatibility. **Why Better:** Competitors require maintenance windows, planned outages, and regression testing. Workato ensures 99.98% uptime with continuous innovation automatically delivered.
Enterprise Agility Workato Proof Case studies and evidence of where we've solved for a 'like' customer in the past. Tangible results around REVENUE, RISK, COST	**GARTNER® 2025 MAGIC QUADRANT FOR iPaaS** • Market Leadership - Workato recognized as a Leader for the seventh consecutive year and placed furthest in vision among all vendors. Gartner calls Workato the only vendor cited as an orchestration platform praised for unifying B2B, MDM, RPA, and agentic AI use cases. • AI Leadership: Workato received the highest score for AI Enablement use cases (3.66, ranked #1). Gartner states: *"Workato Orchestration Platform received excellent scores for AI implementation support, addressing needs in both aspects of this market: AI for integrators and integration for AI."* • Customer experience - Workato customers report extremely high customer satisfaction

These are hand-picked testimonials, case studies, and reports for **Enterprise Agility**

More customer stories in the **Customer Story Library**

with the product and vendor, as recognized by Gartner's Peer Insights Customers Choice award. Workato received 4.9 out of 5 stars with 99% of customers overall recommending Workato to their peers, placing Workato above competitors such as Boomi, Mulesoft, Tray, SAP, and Oracle.

- Marketing execution - Workato's growth in market mind share is due, in part, to initiatives such as the Automation Institute, hackathons, presence at key industry events, and partnership.
  Gartner approved customer-facing slide - Gartner MQ for iPaaS

Analysis.tech - Dave Marcus, Principal Analyst: *"MCP is quickly becoming the de facto way for anyone building agents to integrate with third-party data and applications. By building on its foundation in enterprise integration, Workato's MCP platform delivers high-quality, secure, and well-governed MCP services."*

Superb Gartner Peer Insights ratings:
- Integration & Deployment: 4.9
- Service & Support: 4.9
- Product Capabilities: 4.9

Customer/Partner References & Case Studies

- Embed customer - Leandro Morelato, Senior Full Stack Developer at TrustArc: "Workato Enterprise MCP allows us to connect our AI agents to the enterprise systems and data our customers rely on. Before, those agents operated in silos, but with MCP, ***we can unlock richer insights, deliver more intelligent experiences, and focus our efforts on driving innovatio***n. Even better, because Workato handles all the heavy lifting, we can easily integrate MCP into our existing systems with ***minimal effort and maximum flexibility.***"
- Embed customer - Anand Narasimhan, Chief Technology Officer at S-Docs: "Workato Enterprise MCP will enable SaaS platforms like ours to ***connect agents to the systems and data that matter most*** — securely and ***at scale.***"
- Theo Chu, Product Manager at Anthropic: *"We're excited to see the MCP transforming Workato's approach to enterprise workflow automation. With Workato's Enterprise MCP offering, Claude brings* ***more intelligent, context-aware automation*** *to the enterprise."*
- Alan Braun, VP of Product Ecosystem at Atlassian: *"Atlassian Rovo MCP Server and Workato's Enterprise MCP together allow customers to* ***unlock autonomous actions*** *across Jira and Confluence with the security, governance, and skills required for AI at scale."*
- Ben Kus, Chief Technology Officer at Box: *"In collaboration with Workato Enterprise MCP, customers receive secure access to their enterprise content and* ***increased confidence in their AI*** *ecosystem."*
- Navitas (Education, ANZ) - *"In the past, we rolled out maybe one or two integrations a year. With Workato, we delivered six in two months. That velocity - of* ***integrating 6 to 18 times faster*** *- means more student services live sooner, more partners onboarded faster, and less operational drag."* - Warwick Calkin, CIO
- Southbase Construction (Construction, ANZ) - *"We delivered value in* ***6 weeks instead of 6 months*** *with Workato's iPaaS"* — Lem Prestage, National IT Manager
- Icon (Construction, ANZ) - *"I began using Workato to solve a specific problem, and soon discovered that it can do so much more. The platform allows us to* ***move quickly, fail fast***

	***and innovate**. It's so much faster than coding manually."* — Dominic Martens, Digital Engineering Manager Specific Business Outcomes: • 95% faster Building Information Modeling (BIM) project administration: 300 users can be added to an Autodesk Construction Cloud (ACC) project within **15 minutes, instead of 5 hours.** • Village Roadshow (Entertainment, ANZ): *"The results were outstanding: zero outages, a 66% reduction in operating costs, and a **4x increase in speed to market**. Workato handled major blockbuster releases like Barbenheimer without breaking a sweat. This was the biggest weekend for Australian cinema since 2019."* - Arul Arogyanathan, CIO Specific Business Outcomes: • 3 entire divisions migrated to Workato in just 12 weeks • Taylor Swift documentary launch handled with concurrency scaled from 50 to 200 in 48 hours • Prime Build (Construction, ANZ): **20% faster** tendering, $600K saved. • Novatti (Finance, ANZ): **>99.9% faster** merchant onboarding; from months to less than 5 minutes • Helia (Finance, ANZ): Customers onboarded in **days vs months**, in the financial services industry. • Scoot (Airline, Asia) - *"We can build a simple workflow and test it in **3 days or less**."* — Ivan Chuah, Senior HR Manager • Seaco (Maritime, Asia) - One of the world's largest shipping container lessors built "Dragonfly", a customized commercial platform using Workato in **agile 2-4 week sprints**. Centralizes account management tools, quoting, contracting, and approvals.- Damian Leach, CIO • SafetyCulture (Technology, ANZ) - **10 times faster**: *"It used to take, on average, 3 to 6 months, for a few engineers to build a new solution from scratch. With Workato, we adopt a more logical process of evaluating new ideas by taking a couple of weeks to map out the process first, and then automate it in a week or less"* - Tim Litton, CIO **ERMHA365** (Nonprofit, ANZ) **Problem:** Disconnected manual processes: Reports took 5-7 days to generate. Poor visibility with siloed, out-of-date data. Unbudgeted overtime costs spiraling to AU$30,000/month. Compliance challenges with FairWork pay award requirements. Peak of 34 violations per fortnight **Solution:** Partnered with UST Leonardo to build intelligent overtime monitoring and proactive compliance monitoring solutions on Workato. Implemented real-time data syncs between workforce management systems, Microsoft 365, and PowerBI with MSTeams chatbot alerts. **Agility outcomes:** • **160x faster reporting** - from 5 days to 15 minutes • **40% reduction in time spent creating rosters** • **50% faster shift filling** • **10 weeks to go live** with several end-to-end integrations • Good360 (Nonprofit, ANZ) - *"We brought in Workato to replace our inflexible integration tool (Celigo), and were blown away with the user experience – how easy it is to build recipes. We've since made it the centrepiece of our ecosystem to integrate all of our*

	SaaS platforms and data analytics tools as well." — Shawn Peters, Chief Technology Officer. Outcomes: 8 weeks to go live, lower IT overheads, Update user data 8x faster - in less than 15 min, instead of >2 hours (Video testimonial) **Samsara** • **Problem:** Worker safety, sustainability, IT couldn't move at the speed of the company (Stephen Franchetti, CIO, Samsara) • **Solution:** IT Genie, Sales Genie • **Outcomes:** ○ Ability to process 14 trillion datapoints ○ 2X ability to drive automation and IT Service delivery in a few weeks vs 6 months ○ +20% sales attainment ○ Automated ~30% of IT helpdesk work ○ Time-to-Market: New features rolled out much faster ○ Geographical expansion: entering new markets in record time **Persefoni** • **Problem:** New regulations set to drive significant growth, without large hiring to match • **Solution:** Modernization, CS Genie • **Outcomes:** ○ CS Knowledge Genie built and deployed within a week ○ 3x CS productivity with same quality of service ○ Cross organization orchestration, breaking down data silos **Asana** • **Problem:** IT silos: different tools that had different pieces of information, inability to pull all those pieces together, take the information from one place to another and really correlate that. Hard to prioritize what to do next or what's gonna be on the road map. Internal developments as a bottleneck. • **Solution:** Out-of-the-box connectors • **Outcomes:** ○ Time-to-Resolution, *"we can just deploy things so fast"* (Tucker Perry, Sn. IT Systems Engineer Manager, Asana) ○ Break down silos ○ IT is no longer a bottleneck **Lucid Motors** • **Problem:** The journey of the employees, customers, partners: it used to take 7 days to process a loan application (Sanjay Chandra, VP & Global Head of IT, Natasha Irani, Global Head of Enterprise Business, Ravi Mikkilineni, Lucid Motors) • **Solution:** Success Factors Workforce, >40 integrations, rolled out in 12+ countries • **Outcomes:** ○ 350% faster vehicle delivery ○ Operational efficiency

	○ Data accuracy ○ Ability to make decisions faster ○ Superior wholistic customer and employee experience delivered **Logitech** (Manufacturing, AMER, ENT) • **Problem:** Astronomical pricing for current CRM vendor due to growing data storage needs accelerated the need to migrate to another platform (Zendesk) which also required another iPaaS to support including, maintaining an ecommerce experience for customer without interruption during this migration of their entire product catalog (40+ years of data in SFDC). When COVID hit, customer support tickets went up since in-store services were no longer available, leading to a growing backlog of ecommerce support tickets and a lack of infrastructure to support. • **Solution:** With Workato, Logitech accomplished the following: modernized the ecommerce experience; rebuilt customer support worldwide across multiple channels including call-center and web self-service, 100M+ of end customers with >1B product serial numbers. Agents had to provide timely responses to customer inquiries to post-purchase for seamless, cohesive experience. • **Outcomes:** Logitech saved $2M in initial implementation of the CRM initial migration and a better post-purchase customer experience in just 9 weeks; 70% of customer support tickets deflect to self-service options to alleviate in-person agent support; 92% of customers resolve tickets on their own (processing returns), improve CPQ from 1 week to days; Improved customer support agent and customer retention and experience. • **Additional Logitech Assets:** ○ Slides ○ Video: How Logitech enhanced customer support experience by integrating disparate systems with Workato ○ Blog: How Logitech's Ultimate Ears Pro scaled their digital marketing **David Jones** (Retail, ANZ, ENT) • **Problem:** When COVID hit, there was a need to modernize the ecommerce experience for customers without delay or interruption given the surge in online traffic. • **Solution:** With Workato, David Jones can provide timely responses to customer inquiries post-purchase for a seamless, cohesive experience. • **Outcomes:** Eliminated 12-18h customer wait time after rewards membership sign-up. 10 days to go-live with the first project. Top 3 most critical apps in the company. 50 APIs - Workato chosen over integration via AWS Lambda code. 13k concurrent users during Cyber Monday - proves sufficient parallelism. Replace 90% of Informatica flows with Workato in 7 months. Created a great customer experience at every touchpoint. Enhanced support tools and workflows with automation. Kept up with the changing market and stayed competitive while significantly improving customer retention. • **Additional David Jones Assets:** Slides **Voya** (Banking, AMER, ENT) • **Problem:** Voya had all their integration work outsourced to Cognizant using WebMethods. As Voya Enterprise Architect Maribeth Kayne puts it: *"I have done IT for 25 years and I never experienced anything worse. All requests had to be submitted as written requests and were then routed to the other side of the planet. Because of time zones, you could*

	never talk to anyone. Of course, the results were terrible and it felt like we're totally paralyzed. Nothing got done. Time-to-result was dreadful"
	• **Solution:** Workato's low code interface made it possible to collaborate more easily and also to insource back some integration work because expert and expensive developers were no longer required.
	• **Outcomes:** With Workato's help, Maribeth's team of Voya resources in the US could be involved in integrations and rely much less on developers 12 time zones away. They would be able to make small changes independently, increasing speed and agility. For over 2 years now, Maribeth's vision has been implemented at Voya across tens of integration projects and Voya alumni have taken Workato into new customers to affect similar change.
	• **Additional Voya Assets:**
	  ○ Slides
	  ○ Reference Video
	
	TFG DB Cargo (Manufacturing, EMEA, ENT)
	• **Problem:** TFG needed to bypass the typical enormous cost and hundreds of IT hours involved in syncing disparate systems within the logistics tech stack.
	• **Solution:** Instead of overhauling the tech stack and increasing headcount to cobble together a complex in-house solution, DB leveraged Workato's SDK to connect disparate applications and deploy recipes that account for every aspect of the 100+ unique events that occur within the supply chain flow.
	• **Outcomes:** TFG was able to stay competitive in the rapidly digitizing supply chain and transportation industry including the following:
	  ○ Eliminated need to increase headcount
	  ○ Eliminated 100s of hours of work to integrate systems and perform recurring data structuring.
	  ○ Onboarded the new Tesla factor in 5 weeks.
	  ○ Greater than 60% of integrations are B2B EDI Integrations.
	  ○ Increased delivery speed by 10X for client onboarding: they were able to meet customer requirements at scale and provide real-time analytics and insights, while also reducing errors.
	• **Additional TFG DB Cargo Assets:**
	  ○ Slides
	  ○ Blog: TFG | Digital leaders must build in rapid adaptability to win in today's business ecosystems
	  ○ TFG Whitepaper
	
	Helen of Troy (Manufacturing, AMER, ENT)
	• **Problem:** Siloed tech stack for the 9 Helen of Troy brands left IT scrambling to execute the same tasks by a factor of 9; meanwhile, shift toward cloud/SaaS increased the demand for integration.
	• **Solution:** Helen of Troy leveraged Workato's On-Premise Agent to transfer data and use Workato as the basis of new business processes.
	• **Outcomes:**
	  ○ Increased speed without need to manage 9 different tech stacks
	  ○ Easier to scale and onboard new brands - no longer need to create a new technology

stack for a new brand
  - Frictionless eCommerce experience for employees & customers
  - Enabled new warehouse picking solution, which can improve speed by up to 200%
  - Better equipped to handle influx of cloud + SaaS applications
  - Decreased time spent on operational work & vendor contracts = more time for innovation/other business-critical work
  - Integration/automation capabilities expanded beyond IT
- **Additional Helen of Troy Assets:** Slides

Embed Customer Proof Points (Enterprise Agility Value Driver)

Epicor (Embed customer)

- **Problem:** Before Workato, Epicor's customers continually asked for a way to easily connect Epicor to external products. As a result, Epicor sought to complete their product offering in a way that is efficient and scalable.
- **Solution:** Workato's plethora of connectors and ease of use expedited customers' ability to customize solutions. Now, customers can accelerate process order management across 40+ manufacturing plants, track sentiment and social chatter for marketing initiatives, and more. With Workato Embedded Platform, Epicor could accelerate their integrations offering faster (from 5 months to 2 weeks). With a new ability to spin up integrations in just 15 minutes to any solution, they can say "yes" to customers who want to connect to tools outside of Epicor, accelerate adoption, and increase their industry footprint.
- **Outcomes:**
  - Shorten dev time from 5 months to 2 weeks (80% reduction)
  - Signed deals in 1st week of launch and met annual forecast in only 3 months
- **Additional Resources:**
  - **Slides:** Epicor Customer Story
  - **Case Study Landing Page:** How Epicor Achieved 3x Growth and Market Leadership with Workato Embedded
  - **Blog:** Driving Growth Together: How Epicor Transformed ERP Integration With Workato Embedded
  - **Blog:** How Epicor took our Embedded Platform to market—from determining pricing to raising awareness
  - **Video:** Epicor's 5X award-winning Automation Studios powered by Workato meets forecast in 3 months

Indegene (ANZ + US + India, Embed Customer)

- **Problem:** Indegene's global pharmaceutical client relied on fragmented, manual workflows to manage HCP consent validation across 16 markets, creating compliance risks with GDPR and country-specific regulations while legacy systems struggled to scale.
- **Solution:** Indegene deployed a consent validation engine powered by Workato's Embedded Orchestration to automate real-time HCP consent workflows, centralizing intake from 5+ digital channels with dynamic country-specific logic that adapts to local regulations—from Germany's strict double opt-in requirements to streamlined flows in less regulated markets.
- **Outcomes**
  - **85% reduction** in average HCP validation time
  - **150+ hours/month** saved on manual processing

	○ **20,000+ HCP records** processed across 16 markets (EU and NA) **Ivanti** (Embed customer): • **Problem:** Integrating Ivanti Neurons ITSM with other systems required months of development, specialized resources, and continual updates for each new integration. • **Solution:** Ivanti white-labeled Workato's Embedded Platform as Ivanti Neurons for iPaaS and transformed the way its customers approach integration by providing seamless out-of-the-box connections across various systems. With Workato, Ivanti delivers integrations in days instead of months, offers pre-built connectors and recipes to their customers, eliminating custom development efforts and costs, empowers customers to scale and discover new ways to integrate systems and workflows beyond IT in areas such as procurement, DevOps, and collaboration. • **Outcomes:** ○ 60 days from POC to Product ○ 50% of annual pipeline target achieved within 3 months of launch • **Additional Resources:** ○ **Slides:** Ivanti Customer Story ○ **Ivanti Automate 2024 Presentation:** Transforming Vision - Turning POC to Product in 60 Days **Sitecore** (Embed customer) • **Problem:** Sitecore identified a critical need for integration across its expanding portfolio. • **Solution:** Sitecore white-labeled Workato's Embedded Platform to launch a new product, Sitecore Connect. With Workato, Sitecore built connectors for every product in Sitecore's product portfolio in 4 months, enabled customers to build their own integrations with a drag & drop interface without waiting on developers, connects to thousands of apps in their customers existing tech stacks, alleviates customer concerns and maintains compliance with global regulations concerning data residency. • **Outcomes:** 100% of Sitecore product connectors built in 4 months • **Additional Resources:** ○ **Case Study Landing Page:** Sitecore ○ **Video:** Sitecore x Workato ○ **Slides:** Sitecore Customer Story **Other Relevant Embed Customer Stories for "Enterprise Agility" Value Driver:** • EdCast by Cornerstone: 60% improvement in time to market • TalentReef: Increased implementation speed by 7X • WoodWing: Reduced GTM from 3 years to 1 week • Mitratech: From 2 to 300 integrated customers in 1 year • LivePerson: 50% reduction in implementation time • Wrike: Instant time to value (0 days to market) • OneLogin: Reduced deployment time from 6 months to 2 days • Shutterstock: Delivery time reduced from months to hours • Unanet: Deliver integrations 5x faster • Cobalt: Reduced time to market from 1 year to 2 weeks • Datasite: Reduced implementation time from months to weeks • Docebo: Delivery time reduced by 30%

	• FileVine: Tackled entire backlog in 4 months vs 12 months • Tango Card: 3X faster product innovation • Lever: Launch customer integrations <30 minutes • GUIDEcx: 50X in roadmap acceleration • Sitecore: 100% of all connectors built in 4 months • Censys: 5x increase in integration development • SafetyCulture: 10X faster integration builds
Enterprise Agility Discovery Questions Ask the WSS Coaching Wizard to craft **discovery questions for your specific opportunity** 	**Orchestrate-OUT Motion** - For prospects approaching with iPaaS/Integration needs, while revealing Enterprise Agility gaps **Question about Innovation Speed & Time-to-Value** • **[Q1] When you get a request to connect multiple systems or create new automations, what usually happens, how long does the process take, and how do prioritize the request amongst other priorities?** [AE, SC] [Purpose] *Establish baseline delivery times and resource constraints. Reveals whether integration requests become backlog items and compete with strategic initiatives, indicating potential bottlenecks that prevent rapid innovation.* **Question about Technical Debt & Legacy Integration** • **[Q2] How much of IT's time on a monthly basis is focused on keeping existing integrations running versus building something new?** [AE, SC] [Purpose] *Quantify the operational debt burden. Exposes the ratio of "keeping lights on" vs. innovation work, revealing whether legacy integration maintenance is consuming resources that should drive business transformation.* **Question about IT Bottlenecks & Delivery Constraints** • **[Q3] Walk me through your current integration project backlog. What's on the list and why are those projects waiting?** [SDR, AE, SC] [Purpose] *Expose the innovation pipeline constraint. Makes visible the opportunity cost of delayed projects and whether IT capacity is the limiting factor for business agility.* **Question about Shadow IT & Democratization** • **[Q4] Give me an example of how business teams have worked around IT when they needed something connected quickly? What did they use and what happened when you found out?** [AE, SC] [Purpose] *Surface shadow IT patterns and governance gaps. Identifies where business urgency drives ungoverned solutions, revealing both demand for faster delivery and risks from lack of oversight.* **Question Revealing AI Readiness Gaps** • **[Q5] Walk me through what would need to happen if you wanted to deploy an AI agent that needed to access your enterprise systems today. What's in place and what's missing?** [AE, SC] [Purpose] *Expose AI infrastructure gaps. Reveals whether they have foundational connectivity, authentication, and governance capabilities required for AI deployment or if they're starting from scratch.*

	AI-in Motion - For prospects approaching with AI/Agentic goals, while revealing orchestration/integration gaps **Question about AI-to-Production Gap** • **[Q1] Tell me about your most successful AI pilot: what made it work, and now walk me through what's preventing you from rolling it out across the enterprise.** [AE, SC] [Purpose] *Identify pilot-to-production barriers. Exposes whether they have isolated AI successes but lack orchestration, governance, or integration infrastructure to scale across enterprise.* **Question about Rapid AI Deployment** • **[Q2] When it comes to deploying AI, which business functions are you looking at first and what's driving those priorities?** [SDR, AE] [Purpose] *Understand AI adoption roadmap and priorities. Identifies high-value use cases and reveals whether strategy is cohesive or ad-hoc experimentation across departments.* **Question about AI Governance & Control** • **[Q3] Tell me about your vision when multiple departments want to deploy their own AI agents. How will you keep governance consistent across all of them?** [AE, SC] [Purpose] *Surface federated AI governance challenge. Helps prospect see that AI agent sprawl creates same shadow IT problems as ungoverned automation and need centralized governance model.* **Question about Scale & Production Readiness** • **[Q4] Walk me through your AI roadmap for the next 12-24 months. How many AI agents do you see deploying across the enterprise?** [AE, SC] [Purpose] *Understand AI scale ambitions. Reveals whether they're planning department-specific pilots vs. enterprise-wide deployment, and whether current approach can support that scale.* **Question about Business Impact & Urgency** • **[Q5] Describe what your Board or executive team is measuring you on for AI adoption and business transformation. What's at stake for you and for the company?** [AE] [Purpose] *Expose executive-level AI pressure and metrics. Reveals accountability for AI outcomes and whether current approach can deliver against board expectations, creates urgency.*

Efficiency & OrCA

(1) Do more with Less (2) More output...less baggage (3) Automate the mundane

Efficiency & OrCA Current State

Current state of the business.

We are looking for the undesirable things occurring that we can help solve for.

These are the typical things we see/hear

DIRECT CUSTOMERS

IT Efficiency (*"it takes forever and costs too much for IT to deliver those modifications in the application I requested two months ago"*)

- **Integration Debt :** *The hidden cost of fragmented systems*
  - **(Legacy) integration sprawl:** Complex, disconnected systems creating operational bottlenecks and escalating OpEx, multiple overlapping platforms and tools (iPaaS, RPA, BPM, point solutions) driving up costs with limited ROI and generating security and governance issues
  - **Technical maintenance burden:** 65% of IT bandwidth consumed maintaining existing integrations vs. building new capabilities
  - **Swivel chair operations:** Teams jumping between 3-5 different tools to monitor, troubleshoot, and manage integrations with no unified view
  - **Business Flexibility:** Operational debt limiting the ability to respond quickly to market changes, customer demands, or new business requirements
  - **Data quality issues:** Error-prone processes generating inaccurate data, requiring manual reconciliation and rework
- **AI Readiness**
  - **Integration fragmentation:** Multiple AI infrastructure approaches requiring custom connectivity per agent/tool, hindering efficiency
- **Resource Constraints**
  - **Talent scarcity:** Traditional IT-reliant approaches are creating backlogs as specialized developers become bottlenecks, as well as security and governance specialists
  - **Productivity Loss:** Senior resources (Sr. Devs, architects) are spending 40-60% of time on low-value activities (maintenance, troubleshooting, etc)
  - **Resource Burnout:** Constant firefighting and manual work leading to retention issues in technical teams
- **Training & onboarding delays:** Significant ramp time for new developers on legacy integration platforms and custom frameworks

Business Process Efficiency (*"it takes forever to respond to a customer inquiry"*)

- **Process Cost & Inefficiency**
  - **Fragility & Operational Overhead:** Core end to end cross functional business processes (Procure-to-Pay, Order-to-Cash, ITSM) held together by manual and error-prone workarounds/bandaids, costing significantly more than automated alternatives in labor, time, and error correction
  - **Process Inefficiencies**: Manual reconciliation, error correction, and workarounds are traditionally consuming 30-40% more resources than necessary
  - **Functional/Departmental Coordination:** Departments operating in silos with manual handoffs, no end-to-end process visibility, and unclear ownership
- **Process Visibility**
  - **Data Visibility/Accuracy:** Unable to track process metrics, cycle times, or true

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costs—what can't be measured can't be improved
○ Process documentation: Lack of visibility into how work actually gets done—informally defined, tribal knowledge, impossible to optimize
○ Data quality: Error-prone business processes generating inaccurate data, requiring manual validation and downstream corrections
● Root Cause Identification: Unable to identify where processes break down or where delays occur without manual investigation

EMBED CUSTOMERS
Business Process Efficiency ("it takes forever to respond to a customer inquiry")
● Board-level efficiency mandate to reduce costs while increasing throughput
● Lack of agility (slow vs rapid prototyping, delay in releases or minimum viable product)
● Demand for number of integrations exceeds ability/capacity to deliver
● Pro Serv/CS develop integrations without proper tool set without reusability for other prospects and customers
● Customer dissatisfaction due to lack of requirements being met in timely manner
● Inability to develop and maintain/support integrations in-house
● Extended release cycles vs. competitors shipping continuously
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Efficiency & OrCA Negative Effects

The bad things that result from the current state.

Expressed as operational or financial pains/outcomes.

These are the typical things we see/hear
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DIRECT CUSTOMERS
From Integration Debt & Resource Constraints (IT Inefficiency)
● % of IT budget consumed on maintenance vs. innovation
● output per IT employee (i.e., productivity)
● Long and increasing time to deliver projects including AI initiatives (days/weeks to delivery, months to production)
● # of projects in backlog
● $-value of delayed projects
● High and increasing spend on shadow IT including ungoverned AI tools ($ spend, % of IT budget)
● Poor customer experience from slow, inconsistent service (NPS score, CSAT score, customer churn rate %)
● Wasted development resources building and maintaining custom AI infrastructure (developer weeks per agent, $ cost per integration, $ ongoing maintenance)
● Technical debt from fragmented AI approaches across departments ($ accumulated debt, % of IT capacity consumed)
● High cost of maintaining disparate AI tools and platforms ($ annual license and support costs)

From Business Process Inefficiency
● Wasted development resources building and maintaining custom AI infrastructure (developer weeks per agent, $ cost per integration, $ ongoing maintenance), or application and data integration and workflow orchestration
● Technical debt from fragmented AI approaches and (legacy) integration sprawl across departments ($ accumulated debt, % of IT capacity consumed)
● High and growing operational costs from manual reconciliation, error correction, and rework
● High cost of maintaining disparate AI tools and platforms ($ annual license and support
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	costs) • Slow order/request turnaround time impacting customers and partners (days/hours to complete, SLA breach rate %) • High error rates from manual processes that could be automated (error rate %, rework hours) • Poor customer experience from slow, inconsistent service (NPS score, CSAT score, customer churn rate %) • Limited AI adoption, employees can retrieve information but can't automate work (% adoption, productivity gains unrealized, FTE hours not saved) • Wasted business user time building AI solutions that can't execute real workflows (FTE hours lost, $ opportunity cost) **EMBED CUSTOMERS** **From Business Process Inefficiency** • Lost deals/revenue (competitive and non-competitive) • Customer churn • Time-to-revenue for new features • Declining market share • Profitability erosion • Long Time to Release • Customer Satisfaction Ratings: CSAT (Customer Sat), NPS (Net Promoter Score) • Time and COGS (Cost of Goods Sold) to develop, implement and maintain/support integrations in-house
Efficiency & OrCA Desired State Paints a picture of what life could be should the current state be solved. We can guide the prospect/customer to what we know is possible for them. **These are the typical things we see/hear**	**DIRECT CUSTOMERS** **IT Efficiency** (*"IT can rapidly and cost-efficiently deliver the modifications in the application I request"*) • IT viewed as consultative, innovative partner with positive internal reputation, with high IT efficiency across small, medium, and large projects with predictable timelines • Lower operational costs make previously uneconomical automations financially viable, expanding automation footprint • Simplified operation, management, administration, security and governance • Reduced number of tools needed, shortening learning curves and increasing developer productivity and faster platform onboarding • IT capacity redirected from maintenance to innovation and strategic initiatives • Higher ROI from existing technology investments through better utilization and consolidation • AI-enabled development, testing, and optimization accelerating delivery • Unified AI infrastructure eliminating custom builds and reducing maintenance burden • Reusable AI connectivity deployed in hours instead of months of custom development • Safe, trusted, citizen development, protected by enterprise guardrails **Business Process Efficiency** (*"we can rapidly respond to a customer inquiry"*) • What can be automated will be automated, automation mindset across the enterprise • Operational excellence as a competitive differentiator embedded in company culture • Happy, productive employees spending time on higher-value initiatives • AI handling routine tasks, decisions, and workflows, freeing people for strategic work

	• AI agents that complete real work, automating workflows and executing business processes • Routine decisions, approvals, and tasks handled by AI without human intervention • Business users empowered to build governed AI solutions and integrations/orchestrations that automate work • AI viewed as workforce multiplier and creating extra-capacity, rather than threat • Employees seeing AI as complementary and an opportunity for their own skillset development **Company-Wide Efficiency Through Orchestration** • Integration, automation, and orchestration democratized across IT and business teams • Governed, trusted processes enabling macro (enterprise-wide) and micro (LoB, department, individual) efficiency • Unified orchestration of data, applications, workflows, and AI agents reducing duplication, errors, and manual handoffs • AI agents working alongside people and systems to execute tasks, make decisions, and complete workflows autonomously • Standardized AI, automation, integration, orchestration infrastructure, eliminating fragmented approaches and technical debt • AI seen as a trusted enabler of innovation and project execution across the company **EMBED CUSTOMERS** **Business Process Efficiency** (*"we can rapidly respond to a customer inquiry"*) • Scaleable integrations program (deliver high number of quality integrations at speed of customer demand and integrate every customer); more integrations delivered over a shorter period of time • Predictable delivery timeline of customer integrations • Delivery teams are fully equipped to understand scope and deliver integrations • Efficient business, in this market measured by cost reduction, time to value, and sustainable growth • Speedy delivery of MVP for market validation and organizational buy-in • Conversion of Professional Services (PS) cost center to profit center
Efficiency & OrCA Specific Business Outcomes Goodness that results from the 'desired state'. Lays the foundation for quantifying a solution (think, ROI). **These are the typical things we see/hear**	**DIRECT CUSOMERS** **From IT Efficiency** • Faster time to deliver projects including AI initiatives (days/weeks to delivery, % reduction) • Reduced project backlog freeing capacity for innovation (\# of projects in backlog, $ value of delayed projects eliminated) • Substantial reduction in cost-per-integration • Increased IT employee productivity (revenue per IT employee, $ per FTE) • Reduced spend on shadow IT with unified governance ($ spend reduction, % of IT budget) • Faster AI deployment from prototype to production (days/weeks to production) • Eliminated custom AI infrastructure development (developer weeks saved, $ cost avoided) • Reduced technical debt from standardized AI platform ($ maintenance savings, % of IT capacity redirected)

	From Business Process Efficiency • Faster order/request turnaround time (days/hours to complete, % reduction) • Reduced error rates from AI-automated processes (error rate %, rework hours eliminated) • Increased employee productivity (revenue per employee, output per FTE) • Improved employee engagement and retention (eNPS score improvement, churn rate % reduction) • Reduced cycle time and approval times for end to end processes • Improved customer experience (NPS score, CSAT score, customer churn rate % reduction) • Higher AI adoption driving measurable productivity (% employee adoption, FTE hours saved) • AI agents automating complete workflows beyond information retrieval (% STP improvement) **From Company-Wide Efficiency Through Orchestration** • Higher percentage of automated end-to-end processes (% STP rate) • Reduced duplication and manual handoffs across departments (\# of handoffs eliminated, hours saved) • Increased ROI from AI agents handling tasks autonomously ($ savings, FTE hours redirected) • Eliminated duplicated AI efforts across departments ($ savings from consolidated approach) --- **EMBED CUSTOMERS** **From Business Process Efficiency** • Number of integrations delivered over X period of time • Speed of core product innovation is increased (release cycle) • Churn reduction • Improved customer satisfaction • Cost reduction
Efficiency & OrCA Solution Requirements The solution requirement(s) that are needed to alleviate the negative effects/pain of the customer to achieve the specific business outcomes. **These are the typical things we see/hear**	**SPEED - Time to Value** • **Unified, extensible build experience** - Speed and accessibility for business users, with full power and extensibility for developers • **Repeatable components** - AI assistance, AI copilots, pre-built templates, development accelerators, and Enterprise MCP servers maximizing speed of delivery and consistency of deployment • **Error handling and change management** - Proactive monitoring, detection of defects, version management, etc. with unified visibility and monitoring across the platform • **Proven migration methodology:** Documented approach, tools, and success metrics for faster transitioning from legacy platforms **POWER - Capabilities to solve the broadest set of problems** • **Unified Orchestration Platform** - Orchestration patterns - app integration, data integration, APIM, IDP, BPM, RPA, and Event Streaming, Agentic patterns - build agents, govern agents, leverage out of the box accelerators, MCP - build and expose servers, manage collections, etc.

	• **Enterprise MCP for efficient AI connectivity** - Fully managed MCP infrastructure turning existing automations into agent-ready services instantly, eliminating months of custom development and ongoing maintenance burden per AI agent • **Universal connectivity** - Integrations - apps, databases, warehouses, LLMs, on-prem systems, etc, agents - with ability to integrate into existing data sources and systems, MCP skills and connectivity **SCALE - Grow with enterprise governance and reliability** • **Improve employee productivity** - Get more employees the ability to create integrated experiences and access to AI for building and automating their workflows, but do so safely, and with enterprise guardrails in place • **Future-proof for AI variability** - Ability to change models and AI vendor decisions without rebuilding architecture, with the base assumption that the right model and tool for the job will continue to change • **Operational cost efficiency** - Single platform consolidating integration, automation, and AI infrastructure eliminating licensing, maintenance, and operational costs of multiple tools • **Product innovation commitment:** Regular feature releases, clear roadmap, and demonstrated R&D investment
Efficiency & OrCA Metrics These are the acceptance criteria for the Solution Requirements **These are the typical things we see/hear**	• Integrations/automations built within *<X>* hours, after *<Y>* hours of enablement • Connect to *<system X, Y, Z>* and display custom objects and custom fields with no development effort • Time-to-Value of projects (e.g., go-live in *<X>* weeks) • Democratization: number of builders (non-developers) that can build automations • List of supported integrations (e.g., APIM, ETL/ELT, chatbots, *<X, Y, Z>* apps, etc.) • Single UI for building, maintaining and dashboards • Single runtime • Number of tools needed to integrate/automate *<X, Y, Z>* • Time to set-up reporting/ROI dashboard • Average support response time, resolution time, escalation rate --- **For Embed Customers -** Integrations/automations built within *<X>* hours, after *<Y>* hours of enablement • Connect to *<system X, Y, Z>* and display custom objects and custom fields with no development effort • Time-to-Value of projects (e.g., go-live in *<X>* weeks) • List of supported integrations (e.g., APIM, ETL/ELT, chatbots, *<X, Y, Z>* apps, etc.) • Number of tools needed to integrate/automate *<X, Y, Z>*
Efficiency & OrCA How Workato Does It **&**	**SPEED - Time to Value** • **Workato recipe framework** for building orchestration across apps, data, and agents **Why Better:** Customer-centric build experience with pre-built connectors and templates, natural language building, reusable components enabling rapid iteration, reducing development time by 80% vs. custom coding

Why Workato Does It Better How Workato's solutions & services satisfy the solution requirements set forth by customer, and our competitive advantage **These are the typical ways we solve the customers' pains**	• **Workato Genies** (pre-built agents)**, Enterprise MCP Agent orchestration with intuitive agent studio, enterprise skills and knowledge graph** enable development of agents that can be trusted to access information and take actions in 14,000+ Enterprise applications. **Why Better:** Workato core platform powers skills and genies with pre-built MCP servers. Transform existing API recipes and connectors into MCP skills instantly (zero rewrite), eliminating months of custom AI connectivity development per agent. Microsoft copilots and Salesforce assistants only answer questions, Workato Genies execute complete workflows with built-in KPIs, governance, and human-in-the-loop controls, deploying in days instead of months. • **Workato core platform** - loud-native, serverless orchestration platform integrating 14,000+ applications, databases, and APIs with intuitive recipes, elastic scalability, and enterprise governance **Why Better:** Intuitive for business users & fully extendable for developers. Cloud-native architecture. Pre-built assets at scale. Unified platform. Enterprise security built-in (no bolt-on required). AI & agentic capabilities future-proofing investments. Zero infrastructure overhead eliminating capital expenditure and DevOps burden. **POWER - Capabilities to Solve the Broadest Set of Problems** • **Workato One + Enterprise MCP** - Unified platform combining integration, automation, agent development, and 100+ fully managed MCP servers for secure, production-grade AI agent deployment at scale. **Why Better:** One platform, one runtime, one management layer eliminating the cost and complexity of managing 3-5 separate tools. Competitors force customers to build and maintain their own MCP infrastructure from scratch, Workato turns existing automations into agent-ready skills in minutes, not months, with zero custom development or ongoing maintenance burden. • **Cloud-native, composable architecture** - Handles APIM, IDP, Data Orch, Pub sub, Agentic, MCP **Why Better:** Unified with orchestration and MCP-native. Zero DevOps, zero updates/upgrades, zero infrastructure planning, maintenance, or management. Truly cloud-native eliminating operational overhead that competitors require. • **Library** of connector, skills, and Enterprise MCP servers **Why Better:** No other iPaaS vendor has this depth of connectivity and pre-built assets. Workato's community-driven innovation means customers leverage proven workflows and instant AI connectivity, deploying in hours instead of building from scratch over months • **Enterprise Knowledge Graph** - Workato One includes ability to create knowledge bases for Agent RAG **Why better:** Our knowledge bases can crawl information from a large set of enterprise data sources (e.g., Google Drive, Salesforce, Confluence etc.) and create a knowledge graph that is permission aware, identifies relationships and has rich context about the enterprise business entities. This ensures that agents respond with accurate and reliable information and can be trusted to act against enterprise applications. This is a key differentiator vs using traditional RAG or vector stores.

	SCALE - Grow with Enterprise Governance and Reliability • **Workato build experience** - Intuitive visual recipe builder with AI-powered Copilot, 1,000+ templates, and 900,000+ community recipes for rapid development accessible to business users with full extensibility for developers **Why Better:** Our platform combined with GEARS methodology for Centers of Excellence and comprehensive training enables both IT and business users to build efficiently, reducing reliance on scarce technical resources and accelerating time-to-value • **Flexibility** - BYOM, A2A, MCP platform for 3rd party apps/agents **Why Better:** Fully neutral party bringing iPaaS excellence to AI, supporting any AI model or agent platform without vendor lock-in. Customers can optimize costs by choosing the right tool for each job while maintaining unified governance. • **One Platform** - Vendor rationalization and consolidation experience **Why Better:** OrCA (Operational Cost Architecture) delivers lowest total cost of ownership. Business value team helps quantify savings from eliminating multiple tools, reducing infrastructure costs, and accelerating delivery; typical customers see 60-80% reduction in operational costs vs. fragmented toolsets.
Efficiency & OrCA Workato Proof Case studies and evidence of where we've solved for a 'like' customer in the past. Tangible results around REVENUE, RISK, COST These are hand-picked testimonials, case studies, and reports for **Efficiency** More customer stories in the **Customer Story Library**	**GARTNER® 2025 MAGIC QUADRANT FOR iPaaS** • Market Leadership - Workato recognized as a Leader for the seventh consecutive year and placed furthest in vision among all vendors. Gartner calls Workato the only vendor cited as an orchestration platform, praised for unifying B2B, MDM, RPA, and agentic AI use cases. • AI Leadership: Workato received the highest score for AI Enablement use cases (3.66, ranked #1). Gartner states: *"Workato Orchestration Platform received excellent scores for AI implementation support, addressing needs in both aspects of this market: AI for integrators and integration for AI."* • Customer experience - Workato customers report extremely high customer satisfaction with the product and vendor, as recognized by Gartner's Peer Insights Customers Choice award. Workato received 4.9 out of 5 stars with 99% of customers overall recommending Workato to their peers, placing Workato above competitors such as Boomi, Mulesoft, Tray, SAP, and Oracle. • Marketing execution - Workato's growth in market mind share is due, in part, to initiatives such as the Automation Institute, hackathons, presence at key industry events, and partnership. Gartner approved customer-facing slide - Gartner MQ for iPaaS **Gartner Peer Insights** • #1 in Customer Experience & Continued Product Innovation - Workato has the highest customer rankings of any the top ranked iPaaS leader with special call out to frictionless set up (e.g., infrastructure, deployment, config.) and operations (e.g., admin, maintenance, security) in your environment, and high quality support. **G2 Crowd** • #1 in Best iPass Software as of January 2024 (G2Score)

Customer/Partner References & Case Studies

Workato Enterprise MCP References & Quotes:

- (Embed customer) Leandro Morelato, Senior Full Stack Developer at TrustArc: *"Workato Enterprise MCP allows us to connect our AI agents to the enterprise systems and data our customers rely on. Before, those agents operated in silos, but with MCP, we can unlock richer insights, deliver more intelligent experiences, and focus our efforts on driving innovation. Even better, because Workato handles all the heavy lifting, we can easily integrate MCP into our existing systems with minimal effort and maximum flexibility."*
- (Embed customer) Anand Narasimhan, Chief Technology Officer at S-Docs: *"Workato Enterprise MCP will enable SaaS platforms like ours to connect agents to the systems and data that matter most — securely and at scale."*
- Theo Chu, Product Manager at Anthropic: *"We're excited to see the MCP transforming Workato's approach to enterprise workflow automation. With Workato's Enterprise MCP offering, Claude brings more intelligent, context-aware automation to the enterprise."*
- Alan Braun, VP of Product Ecosystem at Atlassian: *"Atlassian Rovo MCP Server and Workato's Enterprise MCP together allow customers to unlock autonomous actions across Jira and Confluence with the security, governance, and skills required for AI at scale."*
- Dutch Bros - 99% reduction in procurement processing time (from 60 hours to under 15 minutes)
- DocuSign - 50% reduction in learning time, 10% decrease in sales cycle time, 20% increase in average deal size
- Canva (Technology, ANZ) - *"Workato allowed us to put innovative technology in the hands of Canvanauts in a governed way, accelerating the impact that can be achieved with our IT team."* — Michael Denari, Global Head of IT
  Outcomes:
  - 10+ teams enabled with self-service automation
  - 100+ use cases deployed in production
- Village Roadshow (Entertainment, ANZ): *"Workato handled major blockbuster releases like Barbenheimer without breaking a sweat. This was the biggest weekend for Australian cinema since 2019. To top it off, in many instances, we **slashed 4000 lines of code down to under 100 – that's a whopping 98% reduction**!"* - Arul Arogyanathan, CIO
  Outcomes:
  - **66% reduction in operating costs**
  - Work of 5 specialized developers now done by half a DevOps team member
- Woodside Energy (Energy, ANZ) - *"We didn't see Workato as just a tech platform. We saw it as a way to unlock your people, your processes, and your pace of delivery."* — Luke Evans, Integration Team Lead
  Outcomes:
  - Empowered delivery teams to build integrations independently
  - Successfully migrated legacy integration platform before license renewal deadline
  - Cultural shift: teams stopped waiting for integrations
- Icon (Construction, ANZ) **30x more optimised team size**: By automating with Workato, ICON only requires 2 Digital Engineers to deliver on the kind of work being done by 60

digital engineers in other construction firms, according to Dominic Martens, Digital Engineering Manager

- Helia (Finance, ANZ): Two-year agile transformation with AI-first tech strategy. Invoice automation project born from hackathon using Workato community library template. AI/automation for LIXI 2.0 data mapping (XML/JSON conversion). HR, Service Desk, Finance teams onboarded.:
  - **4x developer capacity** (citizen development enabled)
  - **35% time savings** from single connector
- PRISM+ (Consumer Electronics, Asia): **26% cost saving**

ERMHA365 (Nonprofit, ANZ)
Problem: Disconnected manual processes: Reports took 5-7 days to generate. Poor visibility with siloed, out-of-date data. Unbudgeted overtime costs spiraling to AU$30,000/month. Compliance challenges with FairWork pay award requirements. Peak of 34 violations per fortnight
Solution: Partnered with UST Leonardo to build intelligent overtime monitoring and proactive compliance monitoring solutions on Workato. Implemented real-time data syncs between workforce management systems, Microsoft 365, and PowerBI with MSTeams chatbot alerts.
Efficiency outcomes:

- **84% less monthly overtime cost** in first quarter after rollout
- **$300K+ recovered annually** - redirected to core community health programs
- **40 hours saved** per fortnight on manual administration

NSW Rural Assistance Authority (Government, APJ, ENT)

- **Problem:** Hundreds of producers desperately await relief aid - NSW RAA must accelerate paper-based application process; Government assistance application data wasn't aligned across SAP, Salesforce & Square 9, which created several different versions of truth and delayed response times.
- **Solution:** Implement an automation platform to synchronize data and eliminate painful cross-referencing; Automate claims management and record archival in state government; Reduce document storage costs and prioritize connectivity between SAP and Salesforce.
- **Outcomes:**
  - NSW Rural Assistance Authority (NSW RAA) receives **~15,000 cases each month**, in the form of applications, claims and general enquiries. Cases contain file attachments that come from webforms and emails as well. Within 6 months of using a record archival accelerator built using Workato, NSW RAA more than halved their file storage. This value continues to go down, avoiding significant cost overruns.
  - Faster delivery of disaster relief aid to Australian farmers
  - Faster response rate to applications = money in farmers' bank accounts faster, which improves their ability to recover from or respond to natural disasters
  - Newfound ability to address to a larger number of applicants (averaging 4,100+ applications/day), which is particularly important as applications surge from the increased severity of natural disasters
  - Single source of truth eliminates time spent reconciling data
  - Near zero chance of lost or mislabeled applications
  - Increased confidence in data, reports, and project planning

	○ Incorporated more datasets without fear of over complicating the application review process • **Additional NSW Rural Assistance Assets:** ○ Record archival accelerator built on Workato ○ Slides ○ Video: NSW Rural Assistance Authority (RAA) aids farmers in starting over after natural disasters 🎥 **SentinelOne** • **Problem:** Lots of challenges with the quoting process, "it's a slog!" (Al Linke, AVP of Enterprise Applications & Business Engagement, SentinelOne) • **Solution:** CPQ Genie. • **Outcomes:** Time to quote cut in half. **Unity** • **Problem:** Rapid growth and multiple acquisitions created app sprawl, disconnected systems, and high costs. • **Solution:** App consolidations with Workato as the single orchestration platform. Workato became the connective tissue for Unity's most critical workflows and powered automation across Order-to-Cash, Accounts Payable, Accounts Receivable, Publisher Payouts, Intercompany Transfers, and FX Rate Syncs. • **Outcomes:** ○ $19M in total cost savings ○ Freed up 52,000 hours of employee time annually ○ Delivered an 8X return on investment. ○ Eliminated 236 applications ○ Reduced software costs by nearly 30 percent 🎥 **Gonzaga University** • **Problem:** Decline in enrollment of applicants coming into higher education, resulting in position cuts, need to move faster and with less resources (Darren Owsley, Deputy Chief Information Officer, Gonzaga University) • **Solution:** 20 integrations in 7 months, AI agents: IT Genie for ITSM • **Outcomes:** Less time coding, more time curating 🎥 **Lucid Motors** • **Problem:** The journey of the employees, customers, partners: it used to take 7 days to process a loan application (Sanjay Chandra, VP & Global Head of IT, Natasha Irani, Global Head of Enterprise Business, Ravi Mikkilineni, Lucid Motors) • **Solution:** Success Factors Workforce, >40 integrations, rolled out in 12+ countries • **Outcomes:** ○ Operational efficiency ○ Data accuracy ○ Ability to make decisions faster ○ Superior wholistic customer and employee experience delivered

Samsara

- **Problem:** Worker safety, sustainability, IT couldn't move at the speed of the company (Stephen Franchetti, CIO, Samsara)
- **Solution:** IT Genie, Sales Genie
- **Outcomes:**
  - Ability to process 14 trillion datapoints
  - 2X ability to drive automation and IT Service delivery in a few weeks vs 6 months
  - +20% sales attainment
  - Automated ~30% of IT helpdesk work
  - Time-to-Market: New features rolled out much faster
  - Geographical expansion: entering new markets in record time

Persefoni

- **Problem:** New regulations set to drive significant growth, without large hiring to match
- **Solution:** Modernization, CS Genie
- **Outcomes:**
  - CS Knowledge Genie built and deployed within a week
  - 3x CS productivity with same quality of service
  - Cross organization orchestration, breaking down data silos

Atlassian

- **Problem:** Atlassian's Centre of Excellence team needed a better way to help the company's finance team become more efficient, as RPA-only automation was not enough to scale the processes. It was time consuming for the CoE team to maintain these RPA bots, as they were also involved in building low-impact automations for other business units. Over time, the CoE's technical debt grew.
- **Solution:** Building end-to-end finance automations using Workato as a lynchpin technology.
- **Outcomes:** Complete 8,000 - 9,000 end-to-end transactions per month. Build automated workflows in less than 3 weeks, as compared to 2 - 3 months in the past. Equip 49 employees in finance with the skills to automate. Save ~25,000 hours on manual work annually. Close accounting books in 3 hours/month, as compared to 8 hours/month in the past. Validate invoice status requests in 2 mins as compared to 15 mins in the past. Validate vendor account requests in 2 mins as compared to 10 mins in the past.
- **Additional Atlassian Commentary:** When Atlassian's IT organization ran an IT expense audit, they identified a $400,000 spend on Zapier. This wasn't an annual invoice to IT, though. The $400,000 was spread across hundreds of individual expense reports as monthly subscription fees. For Atlassian's IT organization, this was an untenable risk. Atlassian is a public company and as such has to meet data privacy regulations. Also, individual Zapier accounts do not meet Atlassian IT security regulations. Moreover, there is no governance across these accounts. This is entirely "shadow IT". There was no way to find out if customer data was at risk or if any other policies were not followed. On one hand, Zapier helped a large number of Atlassian employees to be productive and improve many processes. On the other hand, this was not manageable and not secure. The company was at risk. As an

alternative to Zapier, Atlassian procured Workato, which has central governance, is security reviewed by Atlassian, meets SOC 2 standards and is fully encrypted.

- **Additional Atlassian Assets:**
  - Slides
  - Customer Story (Finance)
  - Video

Zendesk

- **Problem:** Zendesk had used Boomi for 5 years, but was unhappy because Boomi had not been responsive to support requests nor to fix bugs that were affecting Zendesk's projects. So, when Zendesk embarked on a substantial new project to create a self-service capability for small businesses to purchase the Zendesk product online, they didn't feel comfortable implementing the solution with Boomi.
- **Solution:** Zendesk evaluated multiple iPaaS and picked Workato, especially for its superior Customer Support with responses in the Support Chat within minutes, where Boomi's support tickets would take days.
- **Outcomes:** Zendesk didn't experience similar technical issues with Workato, which was successfully used to implement the challenging self-service order to cash project
- **Additional Zendesk Assets:**
  - YouTube Video Customer Story
  - Zendesk Enablement on Workato

Hubspot (Tech, AMER, CML)

- **Problem:** Rapid scaling led to increased manual work for HR.
- **Solution:** Facilitate auto-hire process, build custom connector to facilitate laptop distribution to new hires, manage task assignment
- **Outcomes:**
  - Saved 100+ man hours and centralized processes with low code no code automation
  - Increased internal systems usability score from 62 to 86 points; 68 hours/month saved on new hire emailing (Emails sent reduced from 24 to 8 per hire)
  - Saved 71 hours on task management; 855 applications automatically marked as hired within first 3 months of the integration;
  - Closed 1,700 tasks automatically on behalf of the Helpdesk team
  - Reduced time to resolution of integration failures from 3 days to 2 hours
- **Additional Hubspot Assets:**
  - PDF
  - Slides
  - Video: How Hubspot replaced an overburdened IT team with business-led automations to accelerate growth
  - Video: How Hubspot centralized their global new hire onboarding process using Workato
  - Video: How Hubspot has oriented its business around best practices in data architecture/automation

Deputy (Tech, ANZ, ENT)

- **Problem:** Deputy seeks to simplify shift work and manage hourly paid employees (there are 2.7B hourly-paid workers worldwide) in often time-consuming and complex tasks

	including tracking time and attendance, and team communications. To do this effectively, they need to solve for data discrepancies, address technical debt and integration needs at scale.
	• **Solution:** Intuitive drag-and-drop capabilities fuels citizen development, freeing up developer resources, so that a business-logic-literate individual can self-serve, collect product data, and federate as needed .
	• **Outcomes:** Integrations that used to take a month now take 2-3 days; a single use case saves weeks of engineering time; 30-minute tasks now take seconds with automation and integration.
	• **Additional Deputy Assets:**
	  ○ Slides
	  ○ PDF
	  ○ Video: Why Deputy chose Workato
	  ○ Video: Deputy simplifies shift work and boosts hourly employee engagement for 250K+ workplaces globally
	
	Broadcom
	• **Problem:** 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.
	• **Solution:** Adopt the Workato Enterprise Orchestration platform to not only replace manual tasks with automation, but to help orchestrate newly-designed processes.
	• **Outcomes:**
	  ○ 6,500 hours saved per month
	  ○ VPN requests fulfilled in 9 seconds (down from 2+ hours)
	  ○ Emails provisioned to new employees 50X faster
	  ○ Increased workforce by 43%, and the IT team didn't need to grow to meet increased needs due to automation
	  ○ Successfully brought 50% of its workforce back to the office due to automated, enterprise-wide contact tracing
	  ○ Improved employee retention by eliminating fatigue from manual tasks
	  ○ Increased accuracy & timeliness of IT requests = no complaints from the business (used to get 1+/day)
	• **Additional Broadcom Assets:** Broadcom: Customer Story
	
	Enbridge
	• **Problem:** With 18,000 employees worldwide, as well as recent acquisitions, Enbridge needed to streamline its HR processes across the board. From onboarding, offboarding and systems access provisioning to global payroll and safety program management. With over 100,000 events an hour, other integration platforms failed the agility and robustness test.
	• **Solution:** Single centralized HR Hub integrating SAP, Workday, and dozens of other apps / data sources with over 100 automations across all of them in a wall-to-wall deployment.
	• **Outcomes:** Enbridge was able to shift strategy from fragmented local integration providers to Workato's cloud-native platform, after the successful acquisition of another energy company, integrating dozens of HR apps into a unified HR hub. This large-scale project allowed the addition of new employees from acquisitions to join the company's

processes like payroll without any problems.
- **Additional Enbridge Assets:** Customer Story

Avidxchange (Tech, AMER, CML)
- **Problem:** Avidxchange had to meet a pressing deadline to migrate data from HubSpot to Marketo, and set up new email campaigns for suppliers that would replace manual and costly paper mailers.
- **Solution:** Implemented Workato's enterprise orchestration platform to accelerate data migration and orchestrate email campaigns.
- **Outcomes:**
  - $100K+ saved in annual marketing spend
  - 76% increase in customer engagement via email
  - 2,000+ hours/year saved in marketing work
  - <3 month data migration to Marketo well ahead of deadline
- **Customer Quote**: *"With Workato, we're able to solve bigger problems. We can expand across multiple tools and connect them in different ways. Internal teams approach us and ask how they can use it for their use cases. Stakeholders often won't know the depth of possibilities with automation. Being able to ask what problems they want to solve and providing multiple solutions creates the opportunity to make a bigger impact."* - Doug Higbee, Director of Marketing Operations
- **Additional Avidxchange Assets:**
  - Slides
  - Video: How Avidxchange's Marketing Ops team paved the way in building a culture of automation

Leading global payment card provider (Visa - ⚠️ External NDA required ⚠️)
- **Problem:** Merchant Service receives weekly Excel Sheets with data from all tens of thousands of merchants. This data needs to be imported to the central Visa Salesforce instance. This is not a task well suited to either an ETL tool (like Informatica), an ESB (Mulesoft, TIBCO etc.) or an RPA tool (like UIPath). Visa used a data loader tool from Salesforce's AppExchange, but the process wasn't fully automated and errors happened which led to less-than-ideal data quality.
- **Solution:** With Workato, they found a platform that could automate the process end to end, from receiving files on FTP or via email, to opening the Excel data files, validating their structure, rejecting incorrect file formats, and then reading the data row by row into the right Salesforce data objects and field. Workato made this possible with its email, FTP and Salesforce connector, it's ability to understand the Excel file format and complex recipe logic to implement file validation and transformation to the Salesforce destination format. Errors, rejections etc. can also be handled given Workato's logging and retrial logic.
- **Outcomes:** With all these capabilities, Workato reduced their risk of making mistakes in the process of data movement and aggregation into Salesforce. This is of high value as the merchant data is instrumental to the company's operational success.
- **Additional Visa Assets:** Slides

Embed Customer Proof Points (Efficiency Value Driver)

Mitratech (Embed customer)
- **Problem:** Before Workato, Mitratech (formerly Trakstar) struggled with limited integrations,

making it hard to close deals and retain customers. A packed roadmap left little room for development, slowing onboarding and frustrating prospects who needed automation and connectivity.

- **Solution:** Workato gave Mitratech a scalable integration platform that accelerated deployment without burdening engineering. By standardizing integrations and enabling non-engineers to build them, they scaled from two to 300 integrated customers in a year, improving acquisition, retention, and growth.
- **Outcomes:**
  - Scaled from two to 300 integrated customers in a year (150X increase)
  - 100% of integration requests now being fulfilled
- **Additional Resources:**
  - **Slides:** Mitratech Customer Story
  - **Case Study Landing Page:** How Mitratech Achieved 150x Growth in Integrated Customers with Workato Embedded
  - **Video:** Workato X Mitratech

Censys (Embed customer)

- **Problem:** Before Workato, Censys struggled with slow, manual integration development, relying on API documentation and partner coordination. They could only build 1-2 integrations per quarter despite 10-15 customer requests, leading to backlogs, delayed responses, and scalability challenges.
- **Solution:** Censys used Workato's prebuilt connectors and Recipe Builder to speed up integrations, reducing manual effort and reliance on engineers. By empowering non-technical teams and streamlining internal workflows, they scaled more efficiently, improved productivity, and accelerated customer response times.
- **Outcomes:**
  - 5x increase in integration development
  - 10+ customer integration request completed each quarter
  - Entire backlog eliminated
- **Additional Resources:**
  - **Case Study Landing Page:** Censys
  - **Video:** Workato x Censys
  - **Slides:** Censys Customer Story

Bullhorn (Embed customer)

- **Problem:** Integrating pay and bill systems, such as ADP, with Bullhorn's platform was out of reach due to high complexity and cost. Bullhorn handled integration requests as bespoke, custom projects, an approach that became unwieldy and costly over time.
  Solution: With Workato, Bullhorn can provide seamless connections between its platform and various pay and bill systems. With Workato, Bullhorn connected all customers to pay and bill systems without having to develop bespoke integrations, create repeatable, out-of-the-box integrations to popular systems, and drive new efficiencies with internal automation without relying on engineering resources.
- **Outcomes:**
  - $100K+ saved annually on integration development
  - 10x faster deployment compared to custom builds
  - Billions of transactions processed monthly

	• **Additional Resources:**
	  ○ **Case Study Landing Page:** Bullhorn
	  ○ **Video:** Workato x Bullhorn
	  ○ **Slides:** Bullhorn Customer Story
	
	Other Relevant Embed Customer Stories for "Efficiency" Value Driver:
	• Autodesk: 0 developers needed, only 2 resources building integrations
	• Epicor: $100K saved in dev costs
	• WoodWing: 50% time saved building integrations
	• Wrike: Only need 3-5 developers vs 50-100
	• LivePerson: 50% reduction in cost and implementation time
	• Pipefy: Sellers build and manage integrations without dev support
	• Shutterstock: Entire solution managed by 1 person, 0 dev support needed
	• Cobalt: Customers launch their own integrations in half the time
	• Datasite: 0 developer costs or overhead
	• Insightly: CRM capabilities multiplied 10X
	• ClickUp: Hundreds of hours of dev support saved each year
	• Conversica: 40+ integrations supported by 1 engineer
	• SlapFive: End customers see results in <30 days
	• Indegene (Biomed, Embed): 150+ hours/month saved on manual processing

Efficiency & OrCA Discovery Questions Ask the WSS Coaching Wizard to craft **discovery questions for your specific opportunity** 	**Orchetrate-OUT Motion** - For customers with mature integration/orchestration exploring AI adoption: • **[Q1] Now that you've built a mature integration and orchestration foundation, where do you see the biggest opportunities to infuse AI? Why would you prioritize those?** [Purpose] *Positions their orchestration investment as the foundation for AI, while uncovering specific bottlenecks/issues AI could address.* • **[Q2] You've successfully orchestrated data, applications, and processes. When you think about deploying AI agents to automate decisions within those workflows, what's preventing you from moving AI projects from prototype to production at the same speed?** [Purpose] *Reveals the gap between orchestration maturity and AI deployment capability, quantifying the speed difference.* • **[Q3] Looking at your orchestrated processes today, if you could calculate the productivity impact of having AI agents autonomously handle routine decisions and tasks within those workflows, rather than humans making those decisions, what would that be worth to your organization?** [Purpose] *Drives quantification of AI opportunity on top of existing orchestration, creating urgency around unrealized efficiency gains.* • **[Q4] As you add AI capabilities to your integration and automation stack, how are you thinking about avoiding the same tool proliferation and complexity you worked hard to reduce through orchestration?** [Purpose] *Surfaces the risk of fragmenting their consolidated architecture with point AI solutions, setting up unified platform discussion.* • **[Q5] As you scale AI agents across your orchestrated workflows, how much additional**

	IT overhead in terms of infrastructure, maintenance, and operational support are you expecting to absorb? How does that impact your economics? [Purpose] *Quantifies the operational cost implications of scaling AI on existing orchestration foundation, revealing OrCA efficiency concerns.* **AI-in Motion** - For customers driving AI-first strategy without orchestration awareness • **[Q1] When your AI initiatives need to read data from or take actions in your enterprise systems — e.g., CRM, ERP, HRIS, etc. —, walk me through what that connectivity and integration process looks like today and how long it typically takes?** [Purpose] *Exposes the hidden integration work and delays that prevent AI from reaching production, quantifying time waste.* • **[Q2] Looking at your AI projects over the past 12 months, what percentage successfully moved from prototype to production at scale, and for those that didn't, what was the primary technical or operational blocker?** [Purpose] *Quantifies the AI scaling failure rate and surfaces orchestration/integration as the typically unnamed root cause.* • **[Q3] Despite your AI investments, what percentage of high-value employee time is still spent on manual, low-value tasks like data entry, copy-pasting between systems, or waiting for approvals, and what's that costing you annually in lost productivity?** [Purpose] *Creates urgency by quantifying the efficiency gap that remains despite AI spend, revealing orchestration shortfall.* • **[Q4] When you think about your most critical business processes — e.g., Order to Cash, Procure to Pay, IT Service Desk — how many unnecessary manual handoffs, data re-entry steps, or avoidable delays currently exist between systems, and how often do inaccurate AI outputs force rework because the underlying data, systems, and workflows aren't properly governed and orchestrated?** [Purpose] *Surfaces both wasteful manual friction points AND the hidden rework cost from AI operating on ungoverned, unorchestrated foundations, revealing the dual efficiency drain.* • **[Q5] As you've added AI capabilities across different departments and use cases, how many different tools, platforms, and point solutions are you now managing to connect AI to your data and systems, and what's the operational cost and complexity of maintaining that?** [Purpose] *Reveals the tool proliferation and operational debt created by AI-first approach without orchestration foundation, setting up consolidation opportunity.*

Risk Reduction

Company-Wide Orchestration without shadow IT / Make Governance, Risk, Compliance (GRC) a team sport (CISO Targeted)

Risk Reduction Current State

Current state of the business.

We are looking for the undesirable things occurring that we can help solve for.

These are the typical things we see/hear

DIRECT CUSTOMERS

IT & Security Risk

- Lack of visibility and control into who can access sensitive data and what employees are doing with it
- Proliferation of shadow IT outside governance frameworks
- Heavy security and compliance overheads slowing innovation
- Hindered collaboration due to internal gates imposed to manage/mitigate risks

Business Risk

- Risks from rapid innovation without proper change management and central governance
- Agentic solutions deployed with poor security features, poor auditing, poor authentication, and service accounts taking actions
- Manual processes and redundant/inconsistent data leading to human error
- Poor decisions made due to lack of real-time access to critical data/insights
- Slow to react to unexpected threats for damage control/crisis management, or to unexpected opportunities
- AI security and governance gaps across deployment patterns: platform AI tools lacking enterprise controls, shadow AI proliferating without oversight, departmental AI implementations with inconsistent security standards, custom-built AI solutions with insufficient authentication and audit capabilities

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EMBED CUSTOMERS

Business Risk

- Agentic solutions deployed with poor security features, poor auditing, poor authentication, and service accounts taking actions
- #X of current customers leaving for lack of or incomplete integration: product is not entrenched and 'sticky' in the end customer's business, hence not seen as indispensable and can be cut with no major consequences
- Poor solution integration leads to poor/less interaction with the product, hence less value perceived
- Deploying simple, insecure integrations at scale.

Risk Reduction Negative Effects

The bad things that result from the current state.

Typically these are expressed as operational or financial pains/outcomes.

From IT & Security Risk

- Loss of business due to broken customer trust and reputation ($ lost revenue, customer churn rate %)
- Loss of business opportunity from non-compliance with required industry standards ($ lost deals, # of disqualified opportunities)
- Fines, penalties, and ransom payments from security breaches or compliance failures ($ fines, $ ransom paid)
- Increased costs from audits, consultants, and internal resourcing for risk management ($ spend, FTE hours)

These are the typical things we see/hear	• Security incidents from AI agents with inadequate authentication and authorization (# incidents, $ breach costs) • Compliance failures from lack of audit trails for AI agent actions (# audit findings, $ penalties) • Data breaches from AI accessing unauthorized systems or data (customer records exposed, $ regulatory fines) • Shadow AI tools creating ungoverned security vulnerabilities (# ungoverned deployments, $ risk exposure) • Inconsistent security controls across departmental AI implementations (# security gaps, audit findings) **From Business Risk** • Loss of productivity due to firefighting and crisis management (FTE hours lost, $ productivity cost) • Delayed project launches due to risk mitigation gates (days/weeks delayed, $ opportunity cost) • Errors and poor decisions from inaccurate or inaccessible data (# of errors, $ cost of bad decisions) • Reputational damage from slow response to threats or incidents (NPS impact, $ brand value loss) • Loss of revenue or strategic advantage (e.g., market share) due to inability to detect early on unexpected business opportunities or threats
Risk Reduction Desired State Paints a picture of what life could be should the current state be solved. We can guide the prospect/customer to what we know is possible for them. **These are the typical things we see/hear**	**Security & Compliance Excellence** • Security "always-on" by default across all systems and processes • Compliance with relevant industry standards (HIPAA, BAA, GDPR, PCI, SOC-1, SOC-2, SOC-3, ISO 27001, ISO 27701, ISO 42001) • Best-in-class security as a competitive advantage and enabler of innovation • Full documentation and logging of ongoing processes and impact when security issues arise **Visibility, Detection & Response** • Immediate detection and minimized impact of external threats • Prompt remediation of anomalies and errors before they propagate • Seamless collaboration through end-to-end data visibility and granular controls • Early visibility and fast reaction and implementation of the required capabilities to take advantage of unexpected business opportunities **Trust & Empowerment** • Total customer trust and strong transparency • Business teams empowered with secure systems and processes • AI agents and automations operating within governed, auditable boundaries with enterprise-grade authentication and authorization • Unified security framework across all AI implementations eliminating fragmented approaches • Complete audit trail for all AI actions with drill-down visibility into decisions and data access • Minimizing shadow AI with centralized governance and policy enforcement • Consistent security standards across AI and non-AI platforms, citizen-builds,

	departmental integration/orchestration, and custom solutions
Risk Reduction Specific Business Outcomes Goodness that results from the 'desired state'. Typically these are important to the 'economic buyer/committee'. Lays the foundation for quantifying a solution (think, ROI). **These are the typical things we see/hear**	**From Security & Compliance Excellence** • Lowered TCO for security operations ($ spend, % reduction) • Revenue growth from ability to serve compliance-required markets ($ new revenue, # of new opportunities) • Mitigated fines and penalties from compliance failures ($ fines avoided, # of violations) • Zero security incidents from properly governed AI agents (# incidents = 0) • 100% compliance in AI-related audits with complete audit trails (% adherence = 100) **From Visibility, Detection & Response** • Faster detection and response to threats and anomalies (time to detection, time to resolution) • Reduced business impact from security incidents ($ cost avoided, downtime hours) • Faster project launches from streamlined risk mitigation (days/weeks to launch, % reduction) • Complete observability into AI agent actions and decisions (% visibility = 100) • Revenue or strategic advantage (e.g., market share) from early detection and reaction to unexpected business opportunities or threats **From Trust & Empowerment** • Increased revenue from customer trust and brand differentiation ($ revenue, NPS score) • Improved employee productivity from reduced security firefighting (FTE hours saved, $ productivity gain) • Shadow AI reduction with unified governance (# ungoverned projects) • Consistent security across all AI and non-AI implementations, reducing complexity ($ cost savings, FTE hours saved)

Risk Reduction Solution Requirements The solution requirement(s) that are needed to alleviate the negative effects/pain of the customer to achieve the specific business outcomes. **These are the typical things we see/hear**	**POWER - Capabilities to solve the broadest set of problems** • **Enterprise MCP Security** - Secure-by-design AI connectivity with 100+ pre-built MCP servers including enterprise authentication, authorization, and full audit logging built-in, eliminating security gaps from custom-built AI infrastructure • **MCP/Agent Controls** - Multi-layer access controls across skills, policies, and RBAC with predictability in actions based on defined rules and governance boundaries • **Zero-trust security** - Full data encryption in transit and at rest with zero-trust architecture principles with fine grain controls to protect sensitive data • **Data Isolation & Retention** - Ability to keep every single customers' data separate. Training and learning data is not shared across customers. Granular retention policies. • **Observability** - Full telemetry tracking. Transparency of every workflow against every agent interaction. Granular audit trails with logs, version history, and access records • **Unified Governance** - Orchestration Platform for data, systems, processes, experiences, MCP and AI agents across the enterprise, supporting both event-driven and human-in-the-loop workflows, along with application and data integration, process automation, API management, event streaming, IDP, BPM, RPA, Event Streaming, Agentic patterns, B2B integration, and AI composition and integration. **SPEED - Time to value** • **Change Management** - Intuitive for business users to adopt while maintaining robust security controls and governance by IT • **Real-time response** - Ability to create ad-hoc security workflows and respond to incidents immediately, as well as to rapidly implement the capabilities required to take advantage of unexpected business opportunity • **Single Platform Experience** - Increased velocity from build to deploy while adhering to enterprise grade governance in a consolidated solution. • **Predictive detection**: Identify potential failures, performance degradation, or security risks before they impact operations **SCALE - Grow with enterprise governance and reliability** • **Scalable infrastructure**: Highly resilient platform that supports growth and peak demand without compromise • **Enterprise governance** - Robust capabilities for IT and security teams to operate and govern at enterprise scale • **Data deletion capabilities** - Ability to detect and delete data across all connected systems on request for compliance • **Regulatory compliance** - Support for industry standards including (HIPAA, BAA, GDPR, PCI, SOC-1, SOC-2, SOC-3, ISO 27001, ISO 27701, ISO 42001)
Risk Reduction Metrics These are the acceptance criteria for the Solution	**Business Outcome Metrics** • % reduction in security related work in business workflows • TCO for security operations • # security incidents • Response & remediation time • Security related fines/ransom

Requirements **These are the typical things we see/hear**	• Churn **Solution Requirement Metrics** • # systems, permissions, data volume, users • Type/level encryption • Encryption key management and Key rotation • Time to create and rollout ad-hoc workflows • Compliance to relevant industry standards (HIPAA, BAA, GDPR, PCI, SOC-1, SOC-2, SOC-3, ISO 27001, 27701, 42001), Trust center for security self service.
Risk Reduction How Workato Does It **&** **Why Workato Does It Better** How Workato's solutions & services satisfy the solution requirements set forth by customer, and our competitive advantage **These are the typical ways we solve the customers' pains**	**POWER - Capabilities to Solve the Broadest Set of Problems** • **Authentication & Access Control** - Patent-based solution that encapsulates user credentials, ensuring agents only operate within user permissions. Multi-layer RBAC across Connectors, Agents, and AHQ provides defense-in-depth protection. Permission aware knowledge search to ensure user and role permissions are also carried through to the knowledge graph when our knowledge bases extract information from enterprise data sources; this ensures that any information that the agent uses for reasoning is also based on the permissions of the end user. **Why Better:** Workato is the only platform where AI agents inherit the exact same data access and permissions as the user who triggers them, ensuring agents can never see or do more than that specific user is authorized to do. Competitors rely on service accounts or elevated permissions for AI agents, breaking the accountability chain and creating security vulnerabilities. Workato's patent-based approach provides defense-in-depth with granular control at every layer. • **Enterprise MCP Security** - Secure-by-design AI connectivity with 100+ pre-built MCP servers including enterprise authentication, authorization, and full audit logging, eliminating the security gaps competitors force customers to build themselves. **Why Better:** Workato delivers complete governance across your entire AI connectivity infrastructure with security controls built into the platform core, not bolted on afterward. Competitors force customers to build their own MCP infrastructure from scratch, creating security gaps, inconsistent controls, and compliance blind spots. Workato's Enterprise MCP provides unified security, authentication, and audit trails across all AI agent interactions out of the box. • **Built-in Security Operations** - Leveraging Workato Recipe Ops to accelerate identification and remediation of operational controls, with continual investment in security certifications and self-service compliance. **Why Better:** Workato provides built-in security operations capabilities reducing manual security overhead and accelerating compliance. Competitors require separate security and compliance tools or manual processes. Workato's continuous investment in certifications (SOC 2, ISO 27001, ISO 27701, HIPAA) and self-service compliance documentation eliminates the burden of proving security controls during audits. • **Data Protection** - No persistent data inside LLM addresses data residency, privacy compliance, and intellectual property concerns. Includes key rotation and BYOK for enterprise-grade key management. **Why Better:** Workato keeps no data inside its LLM, ensuring your sensitive business information never becomes part of AI training data while competitors risk exposing your data through AI model persistence. Workato provides enterprise key management with

	BYOK and key rotation, meeting the strictest data residency and privacy requirements for regulated industries. **SPEED - Time to Value** • **Observability** - AgentStudio provides complete visibility into what agents are doing, decisions they're making, and actions they're taking, with drill-down capabilities and RBAC for both business leaders and security teams. **Why Better:** Workato provides detailed real-time visibility into exactly how agents and automations are performing with complete explainability, enabling rapid troubleshooting and optimized observability. Competitors provide limited visibility into AI agent actions or require separate monitoring tools. Workato delivers unified observability across all automations and AI agents with drill-down capabilities that both business leaders and security teams can access based on their roles. **SCALE - Grow with Enterprise Governance and Reliability** • **Trust - Unified Governance** - Policy-based controls ensure agents operate within defined security boundaries with enterprise-grade authentication, authorization, and audit trails enforced automatically across all AI agents. **Why Better:** Workato builds security and governance directly into the platform core with comprehensive visibility and control tools, backed by the GEARS framework ensuring consistent governance across your entire organization. Competitors lack unified governance across automations and AI agents, creating compliance gaps and forcing customers to manage fragmented security policies. Workato provides one governance model for all capabilities with complete audit trails and centralized policy enforcement. • **GEARS Governance Framework** - Robust IT methodology providing business and technical guardrails that enable organizations to grow AI deployments with confidence and without accumulating security debt. **Why Better:** Workato's GEARS framework provides enterprise IT with structured guardrails to scale AI deployments safely across all four CIO patterns, from platform AI to citizen-built solutions to departmental implementations. Competitors lack comprehensive governance methodologies, leading to inconsistent security controls, shadow AI proliferation, and accumulation of security debt as AI scales. • **Enterprise-Grade Infrastructure** - Workato One Architecture delivers global elastic scale with zero end-user impact, multi-cloud support, and data isolation to ensure reliability as AI agent usage grows. **Why Better:** Workato's cloud-native architecture scales automatically to support thousands of AI agents and automations without performance degradation or security compromise. Competitors require infrastructure planning, capacity provisioning, and performance tuning as AI scales. Workato delivers multi-cloud support and data isolation ensuring reliable, secure operations across all deployment patterns.
Risk Reduction Workato Proof Case studies and evidence of where we've solved for a 'like' customer in the past.	**GARTNER® 2025 MAGIC QUADRANT FOR iPaaS** • Market Leadership - Workato recognized as a Leader for the seventh consecutive year and placed furthest in vision among all vendors. Gartner calls Workato the only vendor cited as an orchestration platform, praised for unifying B2B, MDM, RPA, and agentic AI use cases. • AI Leadership: Workato received the highest score for AI Enablement use cases (3.66,

Tangible results around REVENUE, RISK, COST

These are hand-picked testimonials, case studies, and reports for **Risk Reduction**

More customer stories in the **Customer Story Library**

ranked #1). Gartner states: *"Workato Orchestration Platform received excellent scores for AI implementation support, addressing needs in both aspects of this market: AI for integrators and integration for AI."*

- Customer experience - Workato customers report extremely high customer satisfaction with the product and vendor, as recognized by Gartner's Peer Insights Customers Choice award. Workato received 4.9 out of 5 stars with 99% of customers overall recommending Workato to their peers, placing Workato above competitors such as Boomi, Mulesoft, Tray, SAP, and Oracle.
- Marketing execution - Workato's growth in market mind share is due, in part, to initiatives such as the Automation Institute, hackathons, presence at key industry events, and partnership.

Gartner approved customer-facing slide - Gartner MQ for iPaaS

Gartner Peer Insights

- #1 in Customer Experience & Continued Product Innovation - Workato has the highest customer rankings of any iPaaS vendor: 4.9 out of 5 average score, 98% of customers recommend Workato, highest number of ratings in 2022.

G2 Crowd

- #1 in Best iPass Software as of January 2024 (G2Score).

Analysis.tech - Dave Marcus, Principal Analyst: *"MCP is quickly becoming the de facto way for anyone building agents to integrate with third-party data and applications. By building on its foundation in enterprise integration, Workato's MCP platform delivers high-quality, secure, and well-governed MCP services."*

Customer/Partner References & Case Studies

- Theo Chu, Product Manager at Anthropic: *"We're excited to see the MCP transforming Workato's approach to enterprise workflow automation. With Workato's Enterprise MCP offering, Claude brings more intelligent, context-aware automation to the enterprise."*
- Alan Braun, VP of Product Ecosystem at Atlassian: *"Atlassian Rovo MCP Server and Workato's Enterprise MCP together allow customers to unlock autonomous actions across Jira and Confluence with the security, governance, and skills required for AI at scale."*
- Ben Kus, Chief Technology Officer at Box: *"In collaboration with Workato Enterprise MCP, customers receive secure access to their enterprise content and increased confidence in their AI ecosystem."*
- Nutanix - "Thanks to this automation, our percentage of triaged and assigned tickets is now 100%. Nothing falls through the cracks. It has also improved the time to assignment. We assign tickets 2x faster than before." — Sebastian Goodwin, Head of Cybersecurity
- Swanson Health - "Everything that goes in and comes out is governed. You can audit it, report on it, and remain compliant as a public company without creating a whole new set of compliance problems." — Kevin Wolf
- Vodafone - *"We moved from 85% availability to 100%. Now our customers don't have to worry about outages or manual workarounds."* — Heather Gilbert, Principal Product Manager Service Operations

	• Prime Build (Construction, ANZ): 20% faster tendering, $600K saved. Eliminated risk of $500K errors from missing information • Canva (Technology, ANZ) - *"Governance and controls are important considerations when implementing AI-powered functions, and Canva has already invested in that area. Model context protocol (MCP) is currently a big thing and offers some value, but Workato lets users build a customised MCP server that incorporates a knowledge graph and enterprise governance." — Michael Denari, Head of IT* Outcomes (also see Denari's WoW Sydney 2025 speech): • Enterprise-grade security maintained across 100+ agents in production • 60% incremental deflection rate on Slack support channels (with governance) **ERMHA365** (Nonprofit, ANZ) **Problem:** Disconnected manual processes: Reports took 5-7 days to generate. Poor visibility with siloed, out-of-date data. Unbudgeted overtime costs spiraling to AU$30,000/month. Compliance challenges with FairWork pay award requirements. Peak of 34 violations per fortnight **Solution:** Partnered with UST Leonardo to build intelligent overtime monitoring and proactive compliance monitoring solutions on Workato. Implemented real-time data syncs between workforce management systems, Microsoft 365, and PowerBI with MSTeams chatbot alerts. **Outcome: Zero violations** - from peak of 34 violations per fortnight to making violations impossible **Gonzaga University** • **Problem:** >300 applications and a lot of IT legacy, leading to data integrity and governance complexity (Darren Owsley, Deputy Chief Information Officer, Gonzaga University) • **Solution:** 20 integrations in 7 months, AI agents: IT Genie for ITSM • **Outcomes:** Ability to identify security issues that were otherwise missed. **Evernote** (Tech, AMER, CML) • **Problem:** Even though Evernote continued to grow, the two-person IT team (supported by a handful of contractors) did not, so they needed to make complex tasks like employee offboarding more efficient. • **Solution:** Replace Tray.io with Workato in order to expand the number and variety of automation use cases. • **Outcomes:** ◦ 84% reduction in time spent offboarding employees (30 minutes → 5 minutes) ◦ Reduced time spent training new employees/contractors on how to offboard employees ◦ Greater security due to reduced human error in offboarding ◦ Accelerated employee onboarding, which gets new employees to get productive faster, and reduced manual recruiting tasks ◦ Reduced time spent auditing Slack channels ◦ Improved IT asset management and increased awareness of new

technologies/updates
  - Freed up time to create new value for the company
- **Additional Evernote Assets:**
  - Slides
  - Video: Evernote reduces employee onboarding by 84%, accelerates onboarding & more - all with a team of two

Atlassian

- **Problem:** Atlassian's Centre of Excellence team needed a better way to help the company's finance team become more efficient, as RPA-only automation was not enough to scale the processes. It was time consuming for the CoE team to maintain these RPA bots, as they were also involved in building low-impact automations for other business units. Over time, the CoE's technical debt grew.
- **Solution:** Building end-to-end finance automations using Workato as a lynchpin technology.
- **Outcomes:** Complete 8,000 - 9,000 end-to-end transactions per month. Build automated workflows in less than 3 weeks, as compared to 2 - 3 months in the past. Equip 49 employees in finance with the skills to automate. Save ~25,000 hours on manual work annually. Close accounting books in 3 hours/month, as compared to 8 hours/month in the past. Validate invoice status requests in 2 mins as compared to 15 mins in the past. Validate vendor account requests in 2 mins as compared to 10 mins in the past.
- **Additional Atlassian Commentary:** When Atlassian's IT organization ran an IT expense audit, they identified a $400,000 spend on Zapier. This wasn't an annual invoice to IT, though. The $400,000 was spread across hundreds of individual expense reports as monthly subscription fees. For Atlassian's IT organization, this was an untenable risk. Atlassian is a public company and as such has to meet data privacy regulations. Also, individual Zapier accounts do not meet Atlassian IT security regulations. Moreover, there is no governance across these accounts. This is entirely "shadow IT". There was no way to find out if customer data was at risk or if any other policies were not followed. On one hand, Zapier helped a large number of Atlassian employees to be productive and improve many processes. On the other hand, this was not manageable and not secure. The company was at risk. As an alternative to Zapier, Atlassian procured Workato, which has central governance, is security reviewed by Atlassian, meets SOC 2 standards and is fully encrypted.
- **Additional Atlassian Assets:**
  - Slides
  - Customer Story (Finance)
  - Video

Marel (Manufacturing, EMEA, ENT)

- **Problem:** Managing product versions and revisioning across the value chain required a huge amount of manual effort, but still Marel ended up with inconsistent, poor-quality data.
- **Solution:** Implement Workato as the "highway" to Marel's digital product platform, which connects all versions across the entire value chain.

	• **Outcomes:**
	  ○ 50% reduced effort: decreased time spent tracking down data within different systems to ensure consistency
	  ○ 100X cost savings by preventing poor data quality as a cost-effective method vs. correcting data quality
	  ○ Significant cost savings by reducing need for product fixes
	  ○ Gained transparency into scarce product parts to quickly onboard any number of apps, including legacy apps.
	• **Additional Marel Assets:**
	  ○ Slides
	  ○ Video: How Marel created a digital product highway that reduced application maintenance by 50+% and radically transformed the customer experience
	  ○ Video: Marel synchronized product master data across its value chain for faster accurate customer service
	
	Enterprise Rent-a-Car (Logistics, EMEA, ENT)
	• **Problem:**
	  ○ Seeks to go beyond a classic car rental company to become #1 mobility solution for household needs
	  ○ Reduce recurring costs by quickly reporting customer-incurred liabilities to authorities before deadlines
	  ○ Delayed reporting meant that the company was liable to front the cost that otherwise is the customers' responsibility
	  ○ Reduce friction in the car rental process for better customer experience.
	• **Solution:** Scale up legacy modernization with enterprise orchestration into multiple markets, while streamlining end-to-end customer experience without interruption. Provide timely reporting on customer liabilities to local authorities by regional deadlines to recoup costs.
	• **Outcomes:**
	  ○ Recoup 10K francs/month and protect the company from customer liabilities and fines with 99% faster reporting (1 week to 1 second)
	  ○ On track to become #1 mobility solution for household needs with 99% faster check-in process by collecting pre-rental information before arrivals (SMS & email)
	  ○ Better employee experience by streamlining complexity of backend processes between ERP, CRM, business analytics, and customer service ticketing system
	  ○ Automation enabled the ability to scale and meet demand while penetrating different markets
	• **Additional Enterprise Assets:**
	  ○ Slides
	  ○ PR: Enterprise Switzerland Rent-a-car partners with Workato for legacy modernization to deliver seamless customer experience
	  ○ Video: Enterprise Rent-a-car leverages automation for scaling operations (internal only)
	
	Vituity (Healthcare, AMER, CML)
	• **Problem:**
	  ○ Manual hiring and onboarding processes created barriers to life-saving patient care
	  ○ 300+ interfaces cobbled together to support legacy and new cloud applications across the organization requires digital transformation

- **Solution:** Centralize and standardize integration and automation across the company.
- **Outcomes:**
  - Automated physician and clinician credentialing saves up to 10 hours per hire
  - Accelerated physician onboarding by 40% to serve patients faster, and sped up hiring by 3+ weeks
  - Boosted team productivity by 30%, eliminate 100s of emails
  - Streamlined workflows across all depts: IT, HR, Finance, and more;
  - Updated data across all systems in real-time
  - Improved employee and patient experience, and reduced compliance risks;
  - Reduced time spent on tedious manual processes and more time spent on patient care, reduce technical debt and redundancy with a clearly defined integration strategy
- **Additional Vituity Assets:**
  - Slides
  - Video: Automated physician and clinician credentialing saves up to 10 hours per hire at Vituity
  - Video: Shave 3 weeks off the hiring process and boost team productivity by 30% at Vituity
  - Video: How Vituity overhauled its legacy systems to accelerate physician onboarding by 40% and serve patients faster
  - Video: Vituity improves lives by transforming healthcare

Embed Customer Proof Points (Risk Reduction Value Driver)

GuideCX (Embed customer):

- **Problem:** GUIDEcx needed to provide faster time to value through integration to a wide range of systems their customers used in project managing the onboarding process (CRM, collaboration, training, support, scheduling, etc.) and to automate those actions throughout. Managing integrations in-house worked for simple, one-click authentications but soon fell apart when customers needed even slight variations in mapping or data handling. They tried to continue to build out their UI to support the variations but found their roadmap slowing down**.**
- **Solution:** With Workato, customers can now self-serve integrations, and GUIDEcx can quickly fulfill requests, increasing retention and unlocking new sales and marketing opportunities.
- **Outcomes:**
  - 15% higher win rate
  - 20% higher ACV
  - 25% increase in retention
- **Additional Resources:**
  - **Case Study Landing Page:** GuideCX
  - **Video:** How GuideCX Drives Customer Engagement
  - **Blog:** How GUIDEcx Drives Customer Engagement: 15% Higher Win Rate, 20% Increase in ACV, and 25% Higher Retention

SafetyCulture (Embed customer, ANZ):

- **Problem:** SafetyCulture was declining integration opportunities during the sales process because they had no scalable way to build and run custom integrations. Their legacy approach to custom integrations was unscalable, time-intensive, and put enterprise deals at stake as the business quickly grew.

	• **Solution:** SafetyCulture now uses Workato Embedded in their Enterprise offering to orchestrate workflows from back office systems to their mobile app for frontline workers. This helps them build integrations they can easily tailor to specific customer requirements with faster build-and-test cycles. ***T***he platform meets enterprise security needs with regional data residency, SOC II compliance, and flexible data retention. Advanced customers access the recipe builder to create custom automations and tailored integrations.
	• **Outcomes:**
	  ○ Wins more enterprise deals due to integration flexibility and security
	  ○ Secure self-service automation for advanced customers
	  ○ "Securely empowers builders across the business"
	• **Additional Resources:**
	  ○ **Video:** SafetyCulture's 10x innovation
	  ○ **Slides:** SafetyCulture Customer Story
	
	Trakstar (Embed customer)- Now **Applied Training Systems**:
	• **Problem:** Trakstar often works with clients that lack in-house IT teams or technical experts and need to find a way to integrate their platforms with their clients' HRIS. They needed a solution that can scale from a process perspective and with minimal technical resources involved. They also wanted the solution to deliver a fast time-to-value so that clients could get their needs met quickly.
	• **Solution:** Since implementing the Embedded Platform, Trakstar has been able to bring multiple integrations to market, develop a robust set of automations, and take numerous clients' integrations and automations live. This has already led to improved customer experiences, higher employee morale, and more business for Trakstar.
	• **Outcomes:** After providing integrations, they saw 0% churn in 1 year
	• **Additional Resources:** HR tech takes on new challenges video
	
	Other Relevant Embed Customer Stories for "Risk Reduction" Value Driver:
	• Sitecore: 4 global deployment regions supporting enterprise compliance
	• TalentReef: $300K saved in churn mitigations
	• Backstop Solutions: 7% increase in NRR
	• ShutterStock: 0 Churn since implementation
	• Thought Industries: 15% increase in close rate
	• Chargebee: Reduce churn from 12% to 8%
	• Lever: 10X less churn
	• Mitratech: 8-point higher customer GDR

Risk Reduction Discovery Questions Ask the WSS Coaching Wizard to craft **discovery questions for your specific opportunity**	**Orchestrate-OUT Motion** - For customers with mature integration/orchestration exploring AI adoption: • **[Q1] As you deploy AI agents to operate within your orchestrated workflows, how confident are you that every AI action is fully auditable, e.g. who triggered it, what data was accessed, what systems were touched, and what decisions were made?** [Purpose] *Reveals gaps in observability and audit trails when AI enters orchestrated environments, surfacing compliance exposure.* • **[Q2] Now that you're adding AI capabilities to your orchestration foundation, how are you ensuring that AI agents can only access and act on the specific data and systems**

they're authorized for, without opening broader security holes?
[Purpose] *Surfaces concerns about granular access control and zero-trust principles for AI agents, revealing authentication/authorization gaps.*

- **[Q3] When you think about the AI agents you're deploying across your orchestrated processes, how many are currently operating with service accounts or elevated permissions that bypass your normal security controls, and what's the risk exposure from that?**
[Purpose] *Exposes the dangerous practice of AI agents using service accounts outside governance frameworks, quantifying security risk.*
- **[Q4] As different teams start building AI agents that leverage your orchestration infrastructure, how are you preventing shadow IT proliferation with AI tools now operating outside your security and compliance boundaries?**
[Purpose] *Reveals the risk of ungoverned AI agent sprawl undermining centralized orchestration governance and creating new shadow IT.*
- **[Q5] Looking at your orchestrated workflows that will include AI agents making decisions and taking actions, how much time and cost are you expecting to add for audit preparation, compliance documentation, and proving that AI operated within approved boundaries?**
[Purpose] *Quantifies the compliance overhead cost when AI lacks automated documentation and audit trails within orchestrated environments.*

AI-in Motion - For customers driving AI-first strategy without orchestration awareness

- **[Q1] When your AI agents need to access customer data across multiple systems (e.g., CRM, ERP, databases) how are you currently enforcing that each agent can only see and act on data it's specifically authorized for, and how confident are you that no data is leaking across boundaries?**
[Purpose] *Exposes lack of granular access control and data isolation for AI agents, revealing potential data breach exposure.*
- **[Q2] If your security or compliance team asked you today to produce a complete audit trail showing every action your AI agents have taken over the past 90 days (e.g., which systems they accessed, what data they touched, what decisions they made) how long would that take you, and how complete would it be?**
[Purpose] *Reveals the absence of comprehensive observability and audit logging for AI operations, quantifying compliance risk.*
- **[Q3] Looking at your AI deployments across different departments and use cases, how many are currently operating with hardcoded credentials, service accounts, or authentication methods that bypass your normal security protocols, and what would happen if one of those credentials was compromised?**
[Purpose] *Surfaces the widespread use of insecure authentication for AI agents, quantifying breach risk and potential business impact.*
- **[Q4] As you scale AI agents that are making decisions and taking actions on behalf of your organization, what's preventing someone from deploying an AI agent tomorrow that can access sensitive customer data, transfer funds, or modify records without proper authorization or oversight?**

	[Purpose] *Exposes the lack of centralized governance and enforcement boundaries for AI agents, revealing ungoverned risk proliferation.* • **[Q5] When you think about the different AI tools, platforms, and agents your teams have deployed, how much of your security team's time is now spent trying to understand what each one is doing, who has access, and whether they're compliant with your security policies, and what's that firefighting costing you?** [Purpose] *Quantifies the operational cost and productivity drain from managing ungoverned AI sprawl without unified orchestration and security.*

Revenue Growth

Orchestrate unified customer and employee experiences, operational excellence, and AI-enabled personalization to drive revenue growth, reduce churn, and accelerate time-to-market

Revenue Growth Current State

Current state of the business.

We are looking for the undesirable things occurring that we can help solve for.

These are the typical things we see/hear

DIRECT CUSTOMERS

Customer & Employee Experience

- Inconsistent experiences across systems, different data, different processes, different terminology
- Fragmented systems forcing customers and employees to context-switch across multiple applications, negatively impacting revenue generation
- Rigid experiences that can't keep pace with changing customer expectations

Operational Barriers to Revenue

- Inefficient processes with lots of time spent on repetitive, low-value tasks
- Lack of end-to-end visibility into process completion and status
- Inadequate personalization and detection of buying signals causing inability to upsell, cross-sell, and retain customers at scale

AI & Innovation Gaps

- No clear path to leverage AI for personalized customer experiences
- Limited ability to rapidly deploy new revenue-generating digital services
- Disconnected systems preventing AI from accessing the data needed to drive insights and actions
- AI agents that can analyze data but can't execute revenue workflows or take actions across systems
- Lack of AI infrastructure to enable customer-facing AI capabilities that drive competitive differentiation

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EMBED CUSTOMERS

Customer & Employee Experience

- Increase market share (e.g., moving upmarket/enterprise, enering new markets/industries or geographies) and revenue (e.g., cross-selling/up-selling)
- Prove Product Market Fit
- Beat or compete with top competition
- Bandwidth-stretched product and engineering resources (i.e., delayed customer- or prospect-requested enhancements or features)
- Bandwidth-stretched implementation/CS resources (i.e., CS team can’t keep up with demand for all implementations and one off requests)
- Competitors launching AI-enabled product features while lacking AI connectivity infrastructure
- Customer demand for AI agents integrated with product that can't be met without significant development
- Enterprise customers requiring AI governance and security controls that product can't provide

Revenue Growth Negative Effects The bad things that result from the current state. Typically these are expressed as operational or financial pains/outcomes. **These are the typical things we see/hear**	**From Poor Customer & Employee Experience** • Customer disengagement and churn from frustrating experiences (churn rate %, $ lost revenue) • Employee disengagement from inefficient tools and processes (eNPS, turnover rate %) • Lower customer satisfaction and loyalty (CSAT score, NPS score, repeat purchase rate %) **From Operational Barriers to Revenue** • Slower speed to deliver new products and services (days/weeks to launch) • Dropped or failed tasks impacting customer outcomes (# of failed tasks, $ revenue impact) • High cost of maintaining fragmented experiences ($ IT spend, $ maintenance cost) • Revenue impact due to missed upselling/cross selling opportunities and/or expansion to new markets **From AI & Innovation Gaps** • Lost revenue to competitors offering better, AI-enabled experiences ($ lost revenue, market share %) • Missed opportunities for personalization, buying signals, and upsell ($ unrealized revenue, conversion rate %) • Inability to scale new digital services quickly (time to market, $ opportunity cost) • Limited AI adoption, agents can analyze but can't execute revenue workflows (% adoption, $ productivity unrealized) • Months of development to add AI capabilities delaying competitive response (time to market, competitive position lost)
Revenue Growth Desired State Paints a picture of what life could be should the current state be solved. We can guide the prospect/customer to what we know is possible for them. **These are the typical things we see/hear**	**DIRECT CUSTOMERS** **Unified Customer & Employee Experience** • Consistent, unified experiences across the end-to-end journey • Choice in how customers, partners, and employees engage across multiple channels while maintaining a cohesive experience • Seamless experiences that are easy for customers and easy for the company to create and manage **Operational Excellence Driving Revenue** • Visibility into the customer journey to improve and differentiate faster • Efficient processes that free employees to focus on high-value customer interactions • Rapid deployment of new products, services, and digital experiences **AI-Enabled Revenue Growth** • AI-powered personalization driving engagement, satisfaction, and loyalty • AI agents supporting customers and employees with real-time insights and actions • Intelligent automation enabling upsell, cross-sell, and retention at scale • AI agents that execute complete revenue processes, not just provide recommendations • Instant AI connectivity infrastructure enabling rapid deployment of revenue-generating AI capabilities **EMBED CUSTOMERS** • Increased ARR and differentiation through new product SKU • Improve market standing (e.g., from customer or analyst reviews)

	• Land critical/ICP/top-of-market deals - say "yes" to more • Increased operational efficiency (better margins, more profit) • Increased TAM (new segments, new use-cases) • Achieve financial milestones (ARR, funding rounds, efficiency targets)
Revenue Growth Specific Business Outcomes Goodness that results from the 'desired state'. Typically these are important to the 'economic buyer/committee'. Lays the foundation for quantifying a solution (think, ROI). **These are the typical things we see/hear**	**From Unified Customer & Employee Experience** • Increased customer satisfaction and loyalty (CSAT score, NPS score, churn rate %) • Increased employee engagement and retention (eNPS score, turnover rate %) • Greater brand awareness and reputation (brand awareness %, reputation score) **From Operational Excellence Driving Revenue** • Lower cost of customer acquisition (CAC $, CAC payback months) • Reduced time to resolution in customer service (hours/days to resolution, first contact resolution %) • Reduced average handling time in contact centers (AHT minutes, cost per contact $) • Increments revenue from up-selling/cross-selling **From AI-Enabled Revenue Growth** • Incremental revenue from existing customers (iARR $, ARPU $, NRR %) • Increased conversion from AI-powered personalization (conversion rate %, upsell rate %) • Faster time to market for new revenue-generating services (days/weeks to launch) • Higher AI adoption driving revenue workflow automation (% adoption, revenue per employee) • AI agents executing complete revenue processes autonomously (% STP in revenue workflows, FTE hours redirected)
Revenue Growth Solution Requirements The solution requirement(s) that are needed to alleviate the negative effects/pain of the customer to achieve the specific business outcomes. **These are the typical things we see/hear**	**POWER - Capabilities to solve the broadest set of problems** • **Advanced Content Intelligence for Revenue Teams -** AI must automatically summarize calls, extract pain points, generate personalized messaging, create competitive positioning, and adapt value-based content to persona and use case. AI must tailor recommendations, outreach, proposals, QBR decks, and renewal strategies based on industry, role, engagement signals, usage patterns, and financial impact models. AI must provide real time coaching for reps to accelerate deal execution • **Sales Execution and productivity -** Systems must not only *analyze* but *act*, creating tasks, generating proposals, drafting messaging, updating forecasts, triggering plays, and orchestrating steps across the revenue lifecycle. A unified orchestration layer must ensure insights and actions flow across the entire funnel: from lead → opportunity → customer → expansion → renewal → attribution. • **Enterprise MCP for revenue AI agents** - Fully managed MCP infrastructure enabling AI agents to access and act on revenue systems (CRM, ERP, marketing automation, customer success platforms) with enterprise security and governance built-in • **Dynamic Deal & Account Orchestration -** The platform must support workflows that adapt automatically to changes in behavior, engagement, and risk, modifying steps for qualification, proposal generation, renewal, and expansion plays. • **End-to-End Order-to-Cash Orchestration -** Integrate and automate key business applications (CRM, ERP, billing, notifications) using a service orchestration framework and a common data model to streamline the entire revenue cycle with flexibility, error

	reduction, and real-time data flow, by aligning and syncing systems, eliminating manual steps, and supporting best practices for scalability and customer experience. • **Unified, Consistent, Coherent, and Conversational User Experience -** Integrate customer data and interactions across all touchpoints (web, mobile, chat, email, voice) in real-time to deliver personalized, context-aware experiences that remember user preferences, history, and intent across every channel, with AI-powered conversational interfaces, intelligent routing, and automated workflows that respond instantly to user needs while maintaining consistent branding, tone, and service quality regardless of entry point. • **Unified Orchestration Platform** - Coordination of data, systems, processes, experiences, MCP and AI agents across the enterprise. Supports both event-driven and human-in-the-loop workflows, along with application and data integration, process automation, API management, event streaming, IDP, BPM, RPA, Event Streaming, Agentic patterns, B2B integration, and AI composition and integration. • **Universal connectivity** - Integrations - apps, databases, warehouses, LLMs, on-prem systems, etc, agents - with ability to integrate into existing data sources and systems, MCP skills and connectivity **SPEED - Time-to-value** • **Campaign and Content Orchestration -** Teams must be able to build and adapt GTM workflows quickly, e.g. lead routing, proposal creation, territory adjustments, QBR automation, churn interventions. • **Growth intelligence and attribution -** AI must automatically qualify, enrich, route, and engage leads in minutes, not hours, boosting conversion and preventing revenue leakage. **SCALE - Grow with Enterprise Governance and Reliability** • **Autonomous Revenue Execution with Governance -** AI must execute actions across systems with full audit trails, approval gates, explainability, and safeguards that maintain accuracy and compliance. • **Elastic Scalability Across All GTM Functions -** The solution must support tens of thousands of workflows, expanding teams, increased data volume, and enterprise-grade concurrency across Sales, RevOps, CS, and Marketing. • **Always-On Revenue Reliability -** Critical workflows — e.g., lead routing, forecast updates, churn detection, renewal automation — must run with high resilience to prevent revenue loss from system downtime.
Revenue Growth Metrics These are the acceptance criteria for the Solution Requirements **These are the typical things**	• Time to build, deploy and change (hours, not days or months). E.g., integrations/automations built in *<X>* hours • Response time for opportunities/threats/anomalies and mistakes • Connect to *<system X, Y, Z…>* and display custom objects and custom fields with no development effort • Bot can integrate to two or more systems (e.g., Slack, Teams, Workplace, CRM, Marketo) • Can automate across the spectrum of Enterprise Orchestration, i.e. data flows, API-fication, process flows and experiences across the apps

we see/hear	For Embed Customers • % of customers using integration • # of certified end-users (internal and customers) • Time to go-live • Time to build new automations/integrations • Time and effort/resources required for solutions to demonstrate integration capability during sales cycles • Cost effectiveness
Revenue Growth How Workato Does It & Why Workato Does It Better How Workato's solutions & services satisfy the solution requirements set forth by customer, and our competitive advantage **These are the typical ways we solve the customers' pains**	**POWER - Capabilities to solve the broadest set of problems** • **Universal Connectivity:** 1,200+ pre-built connectors and intuitive custom integration tools connecting 14,000+ unique SaaS apps, databases, ERPs, and legacy systems **Why Better:** Workato connects to 14,000+ apps including key revenue systems out-of-the-box with zero custom coding, from CRM (Salesforce, HubSpot) to ERP (SAP, Oracle) to revenue intelligence (Gong, 6sense) to customer success (Gainsight, Zendesk) to finance (NetSuite, Stripe). Competitors require custom code for most integrations, delaying revenue workflows by weeks or months. Workato's intelligent connectors understand business logic and data models, exposing hundreds of specialized actions per system vs. basic CRUD operations, enabling revenue teams to build complex workflows in hours instead of months. • **Workato Intelligent Document Processing (IDP)**: Seamlessly processes customer-submitted documents, forms, and communications **Why Better:** Native IDP within the orchestration platform eliminates the need for separate OCR/extraction tools and custom integration work. Competitors require separate document processing services, API integrations, and data movement between systems. Workato processes contracts, proposals, invoices, order forms, and customer communications directly within revenue workflows, extracting data, triggering approvals, and updating CRM/ERP systems automatically without separate tools or custom code. • **AI by Workato**: Powers context-aware routing, personalization, sentiment analysis, and intelligent content transformation **Why Better:** Embedded AI capabilities require no external AI services, API calls, or data movement, intelligence flows natively within revenue workflows. Competitors require separate AI platforms, complex integrations, and data sync processes. Workato's built-in AI powers sentiment analysis for customer communications, intelligent lead scoring and routing, personalized outreach recommendations, and churn risk detection—all within unified revenue orchestration without separate AI tools or latency. • **Agent Studio**: Build dynamic, AI-powered workflows that intelligently combine human and system actions **Why Better:** Intuitive agent creation vs. competitors requiring extensive prompt engineering, custom code, or separate development environments. Workato enables revenue teams to build AI agents that execute complete workflows, from lead qualification to opportunity scoring to proposal generation to renewal automation, with governance, KPIs, and human-in-the-loop controls built-in. Revenue agents deploy in days, not months, without engineering bottlenecks. • **Agent Knowledge Graph**: Workato One includes the ability to create knowledge bases for Agent RAG. These knowledge graphs provide enterprise context to Agents to search and

identify relationships across documents, people, events etc and ensure that the information returned by the agents is relevant and accurate
Why better: Our knowledge bases can crawl information from a large set of enterprise data sources (e.g., Google Drive, Salesforce, Confluence etc.) and create a knowledge graph that is permission aware, identifies relationships and has rich context about the enterprise business entities. This ensures that agents respond with accurate and reliable information and can be trusted to act against enterprise applications. This is a key differentiator vs using traditional RAG or vector stores.

SPEED - Time to value

- **Workflow apps**: Workato Apps enable rapid creation of custom UIs and employee/customer portals
  Why Better: Build customer/employee portals in hours vs months of custom frontend development with traditional approaches
- **Workato AIRO™**[1]: AI-assisted workflow creation that suggests best practices, generates logic, identifies issues, optimizes during build time, as well as audits and troubleshoots processes
  Why Better: AI assistance throughout entire workflow lifecycle (build, optimize, audit, troubleshoot) vs competitors offering only generation
- **Workato Acumen**[2]**:** Continuously optimizes customer-facing workflows for speed and reliability
  Why Better: Autonomous, proactive optimization vs competitors' reactive monitoring requiring manual investigation and fixes
- **Genies**: Pre-built/configured AI agents (Sales Genie, IT Genie, Support Genie, HR & Recruiting Genie, CX Genie, Marketing Genie, Security Genie) that automate high-impact use cases out-of-the-box with enterprise security controls already applied
  Why Better: Pre-configured agents deploy in minutes with enterprise security/governance built-in, no custom configuration or infrastructure setup required. Competitors require weeks of prompt engineering, custom code, and separate security implementation. Workato Genies leverage Enterprise MCP servers for instant, secure connectivity to revenue systems, executing complete workflows from day one vs. competitors' chatbots that only answer questions.
- **Workato GO**: Enterprise search with Deep Action™ - find what you need, take action, and orchestrate workflows from a single interface
  Why Better: Single interface for search, action, and orchestration vs. competitors forcing context-switching across multiple tools. Workato GO enables revenue teams to search data, engage AI agents via Enterprise MCP, and execute workflows without leaving the interface, eliminating the inefficiency of separate search tools, chatbot interfaces, and workflow execution platforms that competitors require.
- **Action Board**: Capability of Workato GO that delivers a single dashboard for tracking KPIs, engaging with AI agents, and measuring business impact
  Why Better: Business-user dashboard for KPIs and agent interaction vs competitors' IT-focused monitoring requiring technical expertise

[1] Currently in preview. General Availability slated for 2026
[2] Currently in preview. General Availability slated for 2026.

	SCALE - Grow with enterprise governance and reliability • **End-to-end encryption**: Protects customer data with SOC 2, HIPAA, GDPR, and PCI compliance **Why Better:** SOC 2, HIPAA, GDPR, PCI compliance built-in by default vs competitors requiring extensive manual configuration • **Always-on reliability**: 99.98% uptime SLA ensures consistent, dependable customer experiences **Why Better:** industry-leading SLA for mission-critical revenue workflows vs competitors' lower reliability guarantees • **Elastic scalability**: Auto-scales to handle peak customer demand without performance degradation **Why Better:** Automatic scaling with zero performance degradation vs competitors requiring manual capacity planning and infrastructure provisioning • **Granular auditability**: Complete tracking and logging for compliance and continuous improvement **Why Better:** Complete audit trails built-in natively vs competitors requiring separate logging/compliance tools and custom instrumentation • **Agent Trust**: Ensures all customer-facing workflows maintain enterprise security and compliance standards **Why Better:** Enterprise governance and security controls applied to all AI agents and Enterprise MCP connections by default vs. competitors' bolt-on security requiring custom implementation. Workato ensures all revenue AI agents operate within governed boundaries with complete audit trails, authentication, and authorization built into Enterprise MCP infrastructure, no additional security configuration needed. • **In-platform support**: Live chat with Workato specialists ensures fast troubleshooting and optimization **Why Better:** Contextual live chat with specialists within platform vs competitors' ticketing systems with delayed, context-lacking responses
Revenue Growth Workato Proof Case studies and evidence of where we've solved for a 'like' customer in the past. Tangible results around REVENUE, RISK, COST These are hand-picked testimonials, case studies, and reports for **Revenue Growth**	**GARTNER® 2025 MAGIC QUADRANT FOR iPaaS** • Market Leadership - Workato recognized as a Leader for the seventh consecutive year and placed furthest in vision among all vendors. Gartner calls Workato the only vendor cited as an orchestration platform, praised for unifying B2B, MDM, RPA, and agentic AI use cases. • AI Leadership: Workato received the highest score for AI Enablement use cases (3.66, ranked #1). Gartner states: *"Workato Orchestration Platform received excellent scores for AI implementation support, addressing needs in both aspects of this market: AI for integrators and integration for AI."* • Customer experience - Workato customers report extremely high customer satisfaction with the product and vendor, as recognized by Gartner's Peer Insights Customers Choice award. Workato received 4.9 out of 5 stars with 99% of customers overall recommending Workato to their peers, placing Workato above competitors such as Boomi, Mulesoft, Tray, SAP, and Oracle. • Marketing execution - Workato's growth in market mind share is due, in part, to initiatives such as the Automation Institute, hackathons, presence at key industry events, and

More customer stories in the **Customer Story Library**

partnership.
Gartner approved customer-facing slide - Gartner MQ for iPaaS

Gartner Peer Insights

- #1 in Customer Experience & Continued Product Innovation - Workato has the highest customer rankings of any iPaaS vendor: 4.9 out of 5 average score, 98% of customers recommend Workato, highest number of ratings in 2022

Customer References/Case Studies

- Laurent Farci, CIO at .monks: *"MCP is quickly becoming the standard for how AI works with corporate applications. With Workato Enterprise MCP, organizations can instantly unlock business capabilities with AI in a secure way from day one. Workato already orchestrates critical processes across our business, from sales opportunity management to employee onboarding and IT project management. With Enterprise MCP, we can now transform our business processes into AI-ready services at speed and scale."*
- Angela Stewart, VP of Enterprise Solutions at Nasdaq: *"MCP is the universal bridge between AI and enterprise action, unlocking secure, governed, and instant access to business capabilities. Workato is leading the charge in MCP by creating a standard for organizations to turn their systems, data, and processes into AI-ready services."*
- DocuSign - *"Achieving a 20% increase in average deal size and a 10% decrease in sales cycle time." ; "Giving reps time back, streamlining their workflows, and enhancing access to actionable insights also helped DocuSign significantly improve productivity, achieving a 10% decrease in sales cycle time and 20% increase in average deal size."*
- GUIDEcx - 15% higher win rate, 20% higher ACV, 25% retention increase
- PRISM+ (Consumer Electronics, Asia): **10% higher** email open rate (60% vs <50% industry average), **5x better** click-through rate (8-10% vs 1-2%), 2,800+ targeted emails in 2 months - Workato creates a custom checkout page that retargets older customers and grows the refrigerator business
- EftSure (Embed, ANZ): Eftsure Turned Integration Into an **8x revenue engine**, with **233% higher deal values**

🎥 **Lucid Motors**

- **Problem:** The journey of the employees, customers, partners: it used to take 7 days to process a loan application (Sanjay Chandra, VP & Global Head of IT, Natasha Irani, Global Head of Enterprise Business, Ravi Mikkilineni, Lucid Motors)
- **Solution:** Success Factors Workforce, >40 integrations, rolled out in 12+ countries
- **Outcomes:**
  - Operational efficiency
  - Data accuracy
  - Ability to make decisions faster
  - Superior wholistic customer and employee experience delivered

Unity

- **Problem:** Rapid growth and multiple acquisitions created app sprawl, disconnected systems, and high costs.

	• **Solution:** App consolidations with Workato as the single orchestration platform. Workato became the connective tissue for Unity's most critical workflows and powered automation across Order-to-Cash, Accounts Payable, Accounts Receivable, Publisher Payouts, Intercompany Transfers, and FX Rate Syncs.
	• **Outcomes:**
	  ○ $19M in total cost savings
	  ○ Freed up 52,000 hours of employee time annually
	  ○ Delivered an 8X return on investment.
	  ○ Eliminated 236 applications
	  ○ Reduced software costs by nearly 30 percent
	
	🎥 **Gonzaga University**
	• **Problem:** Decline in enrollment of applicants coming into higher education, resulting in position cuts and need to do more with less (Darren Owsley, Deputy Chief Information Officer, Gonzaga University)
	• **Solution:** 20 integrations in 7 months, AI agents: IT Genie for ITSM
	• **Outcomes:** Superior Gonzaga experience: being a recruit to an applicant to a student to alumni or donor, same experience for every single one of them in the Gonzaga community. Less time coding, more time curating.
	
	Logitech (Manufacturing, AMER, ENT)
	• **Problem:** Astronomical pricing for current CRM vendor due to growing data storage needs accelerated the need to migrate to another platform (Zendesk) which also required another iPaaS to support; Maintain ecommerce experience for customer without interruption during this migration of their entire product catalog (40+ years of data in SFDC); when COVID hit, customer support tickets went up since in-store services were no longer available, leading to a growing backlog of ecommerce support tickets and a lack of infrastructure to support.
	• **Solution:** Modernized the ecommerce experience; rebuilt customer support worldwide across multiple channels including call-center and web self-service, 100M+ of end customers with >1B product serial numbers; Agents must provide timely responses to customer inquiries to post-purchase for seamless, cohesive experience.
	• **Outcomes:**
	  ○ Saved $2M in initial implementation of the CRM initial migration and a better post-purchase customer experience in just 9 weeks
	  ○ 70% of customer support tickets deflect to self-service options to alleviate in-person agent support
	  ○ 92% of customers resolve tickets on their own (processing returns),
	  ○ Improved CPQ from 1 week to days
	  ○ Improved customer support agent and customer retention and experience.
	• **Additional Logitech Assets:**
	  ○ Slides
	  ○ Video: How Logitech enhanced customer support experience by integrating disparate systems with Workato
	  ○ Blog: How Logitech's Ultimate Ears Pro scaled their digital marketing

Chrysalis (Healthcare, AMER, CML)

- **Problem:** Inability to accurately track employee training and certifications, and no real-time data on compliance, resulting in compliance risks. The existing integration from Jitterbit synced only limited info and was much too complex to build upon to get all the necessary data.
- **Solution:** Integrate HR system with Salesforce and replace Jitterbit with Workato. Integrate Paylocity with Salesforce - syncing real-time training progress, renewals, and certifications, and automating reminders and compliance alerts.
- **Outcomes:** Ensure 100% HIPAA and OSHA compliance; Less manual tracking and errors for the HR team, 100% compliance, clear and streamlined training process for employees, and real-time data.
- **Additional Chrysalis Assets:**
  - Slides
  - Video: Chrysalis provides care for people with developmental disabilities

Northcott (Consulting/Professional Services, APJ, CML)

- **Problem:** Need to bridge the gaps for better improved care quality: Reduce incidents and strengthen compliance.
- **Solution:** Seamless integration frees up staff time and supercharges reporting capabilities.
- **Outcomes:** Automation is a game-changer; lean non-profit with limited resources launches a solution in 3 weeks; Automating more of the employee onboarding.
- **Additional Northcutt Assets:** Video: Northcott empowers people with disabilities to live the life they choose

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Embed Customer Proof Points (Revenue Growth Value Driver)

Spiff (Embed customer)

- **Problem:** Before Workato, the team at Spiff was losing deals because there were so many applications they did not integrate with and customers didn't want to deal with manual data uploads.
- **Solution:** With Workato Embedded Platform, Spiff can take advantage of pre-built connectors to turn around new integrations in a matter of days instead of months. Today, a team of five integration consultants ***builds and maintains integrations without developer support.***
- **Outcomes:**
  - $4M in new ARR pipeline
  - $475K in new ARR in one year
- **Additional Resources:**
  - **Slides:** Spiff Customer Story
  - **Video:** Customer Office Hour feature Spiff

TalentReef (by Mitratech) (Embed customer)

- **Problem:** TalentReef was constantly providing concessions to prospective customers because they couldn't get them live in a reasonable timeframe. Supporting integrations took 2-4 engineers.
- **Solution:** With Workato Embedded Platform, TalentReef has achieved a scalable

	integration strategy. Today, integrations are built and maintained by just three consultants, none of whom are developers.TalentReef customers are thrilled that they can go live within days and start realizing value right away.
	• **Outcomes:**
	  ○ 9x new revenue growth
	  ○ $450K in net-new revenue
	  ○ 900% ROI in 6 months
	• **Additional Resources:**
	  ○ **Slides:** TalentReef Customer Story
	  ○ **Video:** TalentReef realizes 900% ROI in 6 months
	
	Backstop Solutions (Embed customer)
	• **Problem:** Building one-off integrations did not deliver ROI and wasn't scalable. None of their competitors had emerged as leaders, so they knew if they could solve the complex data and integration issues, they would be able to own the space.
	• **Solution:** Leveraging Workato Embedded Platform, Backstop launched an entirely new integration solution to its customers within months: Backstop Integrator. The team quickly took action on the feedback from early adopters, and one year later, 75+ private equity firms, hedge funds, and foundations are using Backstop Integrator. Integrations are built and maintained by just three (non-developer) team members.
	• **Outcomes:**
	  ○ 7% increase in NRR
	  ○ 750% ROI in one year
	  ○ 75 new clients in one year (10% of customer base)
	• **Additional Resources:**
	  ○ **Slides:** Backstop Solutions Customer Story
	
	Other Relevant Embed Customer Stories for "Revenue Growth" Value Driver
	• Ivanti**:** $10M in net new business in one year
	• Epicor: Met annual forecast in only 3 months, signed deals in 1st week of launch, 3X growth in 3 years
	• Pipefy: 3.5X increase in ACV
	• OneLogin: 1.5X new revenue in 3 months
	• Shutterstock: 2X new business pipeline
	• Insurity: Closed 12 new customers in 1 week
	• ThoughtIndustries: 220% increase in pipeline, 9% increase in ASP
	• GuideCX: 20% higher ACV, 15% higher win rate

Revenue Growth Discovery Questions Ask the WSS Coaching Wizard to craft **discovery questions for your specific opportunity**	**Opening and open ended questions to set up a customer-focused conversation:** • What AI projects are you working on? • What has been your experience thus far? • What systems do you use to measure revenue health? • Where have you identified challenges for broader adoption and delivery? • Who is driving the urgency to adopt this technology? • What other business units are involved in designing and building solutions? ***Revenue Growth* Questions** • How are you planning to measure the success of this initiative?

	• Where is your lead-to-cash process broken? • When you've seen it done better in the past what did it look like? • What does the technology stack look like today in this process? (all inclusive of enterprise business systems, LLMs and Agentic systems) • If these metrics are met, how does that unlock opportunities in the business? **These are the open ended customer focused questions that provide the necessary clues that a seller must follow in order to have the most impactful discussion. More detailed direct and closed ended questions are appropriate to follow up.**

Workato's Defensible Differentiators

➢ **SPEED**

- Cloud Native, Autoscaling Platform 47
- Fast Build & Delivery Experience 50
- Extensive Connectivity 53
- Globally Recognized Customer Success 56

➢ **POWER**

- Company Innovation, Vision, Leadership 59
- Power of 1 - Breadth of Capabilities & Features 61
- Enterprise MCP XX
- Enterprise Agentic AI 64
- Zero Downtime Upgrade 67
- Composable Platform 69

➢ **SCALE**

- Flexible CX Models 73
- Federated Model 76
- Operational Cost Architecture (OrCA) 79
- Enterprise-Grade Security & Governance 85

Cloud Native, Autoscaling Platform

Comparative	Best against:
	• **Boomi** - Application-based, hybrid/on-prem architecture, slower scaling, higher maintenance • **MuleSoft** - Complex, infrastructure-heavy, requires provisioning and upgrades, higher TCO • **Informatica** -Legacy-heavy, cloud bolt-ons, high operational overhead • **SnapLogic** - Hybrid model, less mature scalability and agentless execution • **Celigo** - Fewer enterprise-grade capabilities, lacks AI-native orchestration

Description

Workato One is a cloud-native, autoscaling platform built for enterprise orchestration at scale, not just designed for the cloud, but engineered to orchestrate data, applications, workflows, and AI agents without infrastructure constraints. Unlike legacy platforms requiring agents, workers, or VMs, Workato is fully serverless, autoscaling, and AI-native:

- **Intelligent autoscaling** – Scales instantly based on workload demands with no pre-provisioning or capacity planning
- **Zero infrastructure management** – No VMs, workers, or containers to configure or maintain
- **Always-on availability** – Zero-downtime upgrades with built-in high availability and redundancy
- **Unified orchestration** – Single platform orchestrating data, apps, workflows, experiences, and AI agents
- **AI-native architecture** – Powers embedded AI Copilots, Enterprise MCP Servers, and intelligent agents with real-time optimization
- **Enterprise-grade security** – Advanced compliance (ISO, SOC2, HIPAA, PCI, GDPR), robust encryption, RBAC, centralized governance, and Virtual Private Workato (VPW) options
- **Workato Acumen** - Continuously optimizes running workflows for speed, reliability, and cost efficiency with proactive performance recommendations

Why it matters: Traditional iPaaS architectures weren't built for modern enterprise scale, speed, or AI-driven intelligence. Workato's serverless architecture eliminates infrastructure drag, reduces operational risk, and accelerates innovation, delivering continuous platform enhancements without customer disruption.

Customer Value

Customer Value	How the Cloud Native Platform Delivers	Proof Points
↑ **Revenue Impact**	Accelerates revenue-generating project delivery [up to 6x faster time-to-production] Scales instantly with business demand, no capacity constraints Enables rapid adoption of new business models through unified orchestration	**Atlassian:** 40% faster ERP migration vs. legacy iPaaS (Case Study) **Gonzaga University:** 2x more automation builders, with efficient onboarding of staff as citizen developers. Enhanced error detection and notifications, eliminating hours spent on log analysis (Case Study) **Fullerton Health:** 87% faster finance reconciliation (Case Study)
↓ **Cost**	• 50%+ lower operational costs [no infrastructure to	**ThredUp:** 53% lower TCO, 5-6x faster

	manage or license] • Elastic resource usage, pay for what you use, no over-provisioning • Centralized IT rollout reduces maintenance overhead [fewer FTEs required]	development after switching from Boomi (Case Study)
↓ **Risk**	• Zero-downtime upgrades and seamless scaling [99.98% uptime SLA] • Enterprise compliance and security certifications [SOC 2, ISO 27001, HIPAA] • Full audit trails and centralized governance • Cloud-native security capabilities unavailable in legacy infrastructure	100% customer recommendation for platform and security (Gartner Peer Insights) **Hubspot:** Time to resolution for integration failures reduced from an average of 3 days to about 2 hours (Case Study)

Defensibility

Analyst Reports:

- Gartner 2025 iPaaS Magic Quadrant: Workato recognized as a Leader for innovation and cloud-native architecture. (Download the report) - Gartner approved customer-facing slide - Gartner MQ for iPaaS
- Gartner Peer Insights 2024: Only iPaaS vendor awarded Customers' Choice, with 100% recommendation for platform and price (Report)
- Forrester Total Economic Impact Study: Cost Savings And Business Benefits Enabled By Workato (Report)
- Gartner MQ for BOAT 2025 - Named Visionary in *inaugural* Business Orchestration and Automation Technologies report
- Gartner MQ for Data Integration Tools 2025 - Named Visionary (shows platform breadth)
- Forrester Wave iPaaS Q3 2025 - Named Leader with **highest possible scores** in Vision, Innovation, and Roadmap

Customer Testimonials:

- CIO, Mechanical Contracting Company: *"Workato gives true cloud scale. Workato is cloud-based, built on the cloud for hyper scalability. Boomi is largely application-based… It doesn't scale efficiently."*
- Vodafone - *"Workato is the glue that connects our systems, processes, and people, driving the next chapter of Vodafone's transformation."* — Luke Bradley, Head of IT Platform Engineering
- Darren Owsley, CTO, Gonzaga: *"We have way more people integrating [with Workato] than we would have ever had with another iPaaS platform."*
- Atlassian: *"ERP transformation, projected to exceed 15 months using legacy iPaaS, was accelerated by 40% with Workato, completed in just 9 months."* (Read more)
- Atlassian: *"When our auditors reviewed our documentation, they were really amazed. They were like all the controls were met, and the systems are really accurate and reliable."* (External Video)
- ThredUp: *"53% lower TCO and 5-6X faster speed of development since switching from Boomi to Workato."* (Read more)
- Monday.com: *"Workato consistently outperforms other options, successfully resolving the highest number of tickets each month. Remarkably, its efficiency now matches the combined efforts of our top 2 team members or an average 3 team members–an achievement that truly stands out"* - Lior Zagurm Director Global IT, Monday.com (Case Study)
- Village Roadshow - 4x speed to market: 8 weeks to go-live with end-to-end cinemas APIs vs 9 months on legacy platform, 98% less code
- Dutch Bros - *"The biggest aha moment was how much time we saved. Once it's running, it runs 24/7 with no intervention."* — Spencer Campbell, Software Engineer II

- Embed Customer **Agiloft:** *"Agiloft is a low-code, highly configurable platform, and Workato meshed seamlessly with our offering. That configurability has made it much easier to sell integrations tailored to whatever legal needs a customer has."* - Jessica Burgos, Product Manager at Agiloft

Certifications & Security:

- PCI-DSS v4.0.1, ISO 27001, ISO 27701, SOC 1 & 2 Type II, HIPAA, IRAP (Security Overview)
- EU data sovereignty - Core AI features now fully hosted within EU
- Virtual Private Workato (VPW) for isolated deployments
- Full audit trails, encryption, and observability at scale

Trap-Setting Questions

1. **Select Trap** - Introduce the concept of the value delivered by the differentiator:
   - *"How often do your projects get delayed due to infrastructure limitations or downtime?"*
   - *"What challenges have you faced when trying to scale to meet new business demands?"*
   - *"How much time and effort does your team spend maintaining or upgrading your current platform?"*

2. **Open Trap** - Tee up and quantify the value for the customer:
   - *"What impact do these delays or infrastructure bottlenecks have on your ability to launch new products or services?"*
   - *"How do these challenges affect your operational costs or your team's ability to focus on innovation?"*
   - *"Walk me though how you estimate the business risk or cost associated with downtime or manual maintenance in your current environment?"*

3. **Close Trap** - Define the customer Solution Requirement (in customer language) aligned with the differentiator:
   - *"What would it mean for your business if your platform could scale automatically and never required downtime for upgrades?"*
   - *"How valuable would it be if your team could focus on delivering new projects instead of managing infrastructure?"*
   - *"How important is it for you to have a platform that provides continuous innovation, security, and compliance, without the overhead of manual updates or maintenance?"*

→ Ref. additional comprehensive list of Enterprise **MCP-specific Trap-Setting Questions** against Boomi/MuleSoft/n8n/Zapier
→ Ask the WSS Coaching Wizard to craft **specific Trap-Setting questions for your deal**

Fast Build & Delivery Experience

Comparative	Best against:
	• **MuleSoft** - Code-first, long ramp times, fragmented tooling and AI • **Boomi** - Slower build cycle, less intuitive UI, weaker community assets • **Celigo** - Smaller template and accelerator ecosystem, less AI assistance, and less robust unified platform. • **Tray.io** - More developer-centric, fewer business-user-friendly accelerators and AI-guided tools. • **Zapier** - Limited governance, insufficient for complex or cross-functional workflows

Description

Workato's Fast Build & Delivery Experience dramatically reduces time-to-value for integration, automation, and orchestration projects. Built on a unified platform powered by embedded AI, Workato enables both business technologists and IT developers to build, deploy, iterate, and scale enterprise-grade orchestrations faster and more intuitively.

- **Unified authoring & deployment** – Build and deliver orchestrations across data, apps, workflows, experiences, and AI agents without switching tools
- **Composable design system** – Drag-and-drop pre-validated components with reusable logic and embedded security for rapid, reliable delivery
- **Community Library** – Access 900,000+ pre-built recipes, templates, and solution accelerators shared by Workato's global user base
- **Pre-built accelerators** - 1,000+ templates, connectors, and solution kits for rapid build and deployment
- **AI-powered development (AIRO™)**[3] – AI-assisted workflow creation suggesting best practices, generating logic, identifying issues, and optimizing during build time.
  Why Better: AI assistance throughout the entire workflow lifecycle (build, optimize, audit, troubleshoot) vs. competitors offering only basic generation without optimization, security flagging, or troubleshooting capabilities. AIRO reduces development time by 30-50% while improving quality and security, proactively suggesting improvements, identifying bottlenecks, and flagging security risks before deployment.
- **AI by Workato**: Native LLM actions for summarization, translation, classification, sentiment detection using OpenAI, Anthropic, and Azure OpenAI
  Why Better: Embedded AI capabilities require no external AI services, API calls, or data movement between systems. Competitors require separate AI platforms and complex integrations. Workato's native AI actions flow directly within orchestrations, processing documents, analyzing sentiment, transforming content, and making intelligent routing decisions without latency or separate tools.
- **Workato IDP**: Intelligent Document Processing extracting structured data from PDFs, images, and emails
  Why Better: Native IDP within the orchestration platform eliminates the need for separate OCR/extraction tools and custom integration work. Competitors require separate document processing services and data movement. Workato processes contracts, invoices, forms, and communications directly within workflows, extracting data, triggering actions, and updating systems automatically.

[3] Currently in preview. General Availability slated for 2026

Why it matters: Legacy platforms are fragmented, require specialized skills, and rely heavily on professional services. Workato empowers teams to build and deliver working orchestrations in hours, not months, reducing backlog, accelerating iteration, and enabling continuous delivery at scale. Embedded AI reduces development time by 30-50% while improving quality, security, and handling real-world complexity like parsing documents, routing based on sentiment, and adapting logic at runtime.

Customer Value

Customer Value	How the Cloud Native Platform Delivers	Proof Points
↑ **Revenue Impact**	Accelerates time-to-market for new revenue-generating automations and digital initiatives. Enables rapid response to business opportunities and customer needs.	**Atlassian:** 40% faster ERP migration vs. legacy iPaaS (Case Study) Gartner MQ for iPaaS 2025: *"Workato's exceptional speed of implementation and ease of use, driven by AI-powered recipe creation and a vast library of pre-built assets, enables rapid business transformation."* **Grab:** "Workato powerful built-in connectors allow us to swiftly and securely integrate our core platforms as well. This highly complex process is so much easier to manage with Workato." (Customer Film)
↓ **Cost**	• Reduces development and maintenance costs by minimizing manual coding and rework. • Lowers reliance on expensive technical resources and/or third-parties. • Pre-built assets and AI guidance reduce project timelines and consulting spend.	Forrester Wave 2024: *"Workato's unified platform and AI-driven development tools enable the fastest time-to-value among evaluated vendors."* Case Study: *"AI-assisted reviews and Co-Pilot features reduce recipe build time and improve quality, saving admin and developer hours."* (Workato Docs) **Icon Construction:** 30x more optimised team size: By automating with Workato, ICON only requires 2 Digital Engineers to deliver on the kind of work being done by 60 digital engineers in other construction firms, such as Dom's former employer, John Holland Group. (Case Study)
↓ **Risk**	• AI-powered Co-Pilots and best-practice templates reduce errors and ensure compliance. • Automated recipe reviews (via Airo[4]/Co-Pilot) catch inefficiencies and security risks before deployment. • Unified platform reduces integration	Workato Docs: *"Builders receive step-by-step recommendations directly within their workflows to ensure recipes are optimized for performance without requiring constant admin oversight."* (Performance Co-Pilot) Gartner MQ 2025: *"Workato's platform reduces integration complexity and governance risk."*

[4] Currently in preview. General Availability slated for 2026.

	sprawl and associated governance risks.	

Defensibility

Analyst Reports:

- **Gartner Magic Quadrant for iPaaS (2025):** Workato is recognized as a Leader, with specific mention of its *"exceptional speed of implementation and ease of use, driven by AI-powered recipe creation and a vast library of pre-built assets."* Gartner approved customer-facing slide - Gartner MQ for iPaaS
- **Forrester Wave for iPaaS (Q3 2025)**: Named a Leader with highest possible scores in Vision, Innovation, and Roadmap. *"Workato's unified platform and AI-driven development tools enable the fastest time-to-value among evaluated vendors."*
- **Gartner MQ for BOAT (2025):** Named Visionary in inaugural Business Orchestration and Automation Technologies report, validating convergence of integration, automation, and orchestration

Customer Testimonials:

- *"With Workato's Co-Pilot and Community Recipes, our team built and deployed critical automations in days, not weeks. The AI suggestions helped us avoid costly mistakes and optimize performance from day one."* — IT Director, Global Retailer
- **Atlassian Case Study:** Built automated workflows in <3 weeks (vs. 2–3 months before), enabled 49 finance team members to build, and saved ~25,000 hours of manual work annually (Case Study)
- **Gonzaga University:** "Our average build for any integration was at least 10 days. We started bringing in Workato and we started to see five days easy." Lyle Spencer, Data Architech (Case Study + Film)
- **Broadcom:** Saved 6,500 hours/month; scaled automation to over 300 workflows with a lean team (Case Study)
- Embed Customer **Sitecore:** *"If we can get this product out in front of customers, it's crazy how fast we can answer their questions. We've even had instances where during a call we've built the actual integration that the customer needed. There is nothing as powerful as immediately seeing the impact of your use case being resolved right there and then. That pulls customers over the line every single time."* - Ivan Lieckens, Senior Product Manager (Case Study)
- Embed Customer **Woodwing:** *"By decreasing build time by 50% to launching new customers to market, Workato helps our company and customers continually adapt to the fast-changing environment."* - Jeff Gapp, Product Evangelist, WoodWing (Case study)
- **Southbase Construction** (ANZ) - *"We delivered value in 6 weeks instead of 6 months with Workato's iPaaS"* — Lem Prestage, National IT Manager
- **Scoot** (Airline, Asia) - *"We can build a simple workflow and test it in 3 days or less."* — Ivan Chuah, Senior HR Manager
- **Seaco** (Maritime, Asia) - One of the world's largest shipping container lessors built "Dragonfly" - a customized commercial platform using Workato in agile 2-4 week sprints. Centralizes account management tools, quoting, contracting, and approvals.- Damian Leach, CIO
- **SafetyCulture** (Technology, ANZ) - 10 times faster: *"It used to take, on average, 3 to 6 months, for a few engineers to build a new solution from scratch. With Workato, we adopt a more logical process of evaluating new ideas by taking a couple of weeks to map out the process first, and then automate it in a week or less"* - Tim Litton, CIO

Community Assets: 900,000+ community recipes available: app.workato.com/browse/recipes

Trap-Setting Questions

1. **Select Trap** - Introduce the concept of the value delivered by the differentiator:
   - *"How much time does your team currently spend on building and deploying integrations or automations?"*
   - *"What challenges do you face when trying to accelerate digital initiatives or automate/orchestrate workflows?"*

- *"How often do project delays occur because of complex or slow development?"*

2. **Open Trap** - Tee up and quantify the value for the customer:
   - *"What impact do these delays or complexities have on your ability to respond to business opportunities or customer demands?"*
   - *"How do extended build times affect your IT and business teams' productivity and focus?"*
   - *"What are the hidden costs — such as overtime, consulting fees, or lost revenue — associated with slow delivery?"*

3. **Close Trap** - Define the customer Solution Requirement (in customer language) aligned with the differentiator:
   - *"How would your operations improve if your teams could rapidly build and deploy with minimal coding and expert guidance?"*
   - *"What difference would it make if your platform provided AI-powered assistance and pre-built assets to speed up development?"*
   - *"How valuable would it be to have a unified platform that reduces manual effort and accelerates time-to-value for your projects?"*

→ Ref. additional comprehensive list of Enterprise **MCP-specific Trap-Setting Questions** against Boomi/MuleSoft/n8n/Zapier
→ Ask the WSS Coaching Wizard to craft **specific Trap-Setting questions for your deal**

Extensive Connectivity

Comparative	Best against:
	• **MuleSoft** - Complex connector development, slower integration with emerging APIs • **Boomi** - Limited AI-native capabilities, slower adoption of new technologies • **Informatica –** Focused on data integration, less emphasis on real-time app connectivity • **Zapier** - Consumer-grade automation, limited enterprise governance, lacks support for complex data structures and on-prem integrations. • **Tray.io** - Developer-focused UX, limited low-code/no-code accessibility, weaker governance and observability for large-scale use. • **Celigo** - Strong for NetSuite-centric use cases, but lacks breadth/depth in connectors and scalability for cross-enterprise orchestration

Description

Workato's Extensive Connectivity enables seamless integration and orchestration with virtually any application, data source, or system — whether cloud, on-premises, legacy, or modern — without custom code or complex middleware.

- **Extensive Connectivity** – Connect to 14,000+ unique SaaS applications, databases, ERPs, and more using 1,200+ pre-built connectors with deep API coverage (dynamic schemas, custom fields, bulk actions, delta sync) and intuitive custom integration tools
- **Custom Connector Development** – Build custom connectors using Workato's Connector SDK for unique or proprietary systems; RPA available when APIs are not
- **Real-Time Integration** – Event-driven workflows and real-time data synchronization across systems
- **AI-Enhanced Connectivity** – AI recommends optimal connectors and streamlines integration processes
- **Centralized Connection Management** – IT-governed, reusable, and auditable connections with fine-grained RBAC, OAuth2 enforcement, and secure credential management
- **Pre-built Enterprise MCP Servers** – 100+ fully managed MCP servers instantly connect AI agents to your applications, data, and workflows with built-in governance

Why it matters: The ability to instantly connect any system removes integration bottlenecks and empowers teams to orchestrate data, applications, workflows, and AI agents without limits, accelerating time-to-value, reducing costs, and future-proofing your integration strategy.

Customer Value

Customer Value	How the Cloud Native Platform Delivers	Proof Points
↑ **Revenue Impact**	Accelerates revenue-generating initiatives by enabling rapid integration of new SaaS, data, or partner systems. Unlocks new business models by connecting to customer, supplier, or partner systems without IT bottlenecks.	**TripActions** rapidly pivoted their business during the COVID-19 crisis by leveraging Workato's flexible integration to refocus on a new product line, enabling business continuity and growth despite a 95% drop in core revenue (Case Study) **Atlassian's** ERP migration helped them close their book in just 3 days, 5 days faster than preivously. (Case Study)

↓ **Cost**	• Reduces integration development (e.g., number of custom connectors to be built) and maintenance costs (no custom code, reusable connectors). • Minimizes need for multiple integration tools or middleware. • Centralized connection management reduces IT overhead.	Workato First Value Program: 90% of new logo customers achieve their first live integration ("First Value") ahead of target, accelerating time-to-value and reducing project costs (First Value Dashboard) **Nutanix**:30% increaseIT service capacity. (Case Study)
↓ **Risk**	• Ensures compliance and auditability with secure, centrally managed connections and runtime user authentication. • Reduces risk of shadow IT and data silos by enabling secure, governed connectivity for all teams. • Future-proofs integration strategy, new systems can be connected as business needs evolve.	**Grab** and **Enterprise Rent-A-Car**: Reduced operational risk and improved compliance by centralizing integration and automating audit trails. Workato Patent: *"Late Connection Binding for Bots"* enables secure, auditable, and scalable user authentication at runtime, unique among iPaaS vendors.

Defensibility

Analyst Reports:

- **Gartner Magic Quadrant for iPaaS (2025):** Workato recognized as a Leader, specifically cited for *"broad connectivity and extensibility, including support for custom connectors and legacy systems."*
  Gartner approved customer-facing slide - Gartner MQ for iPaaS
- **Forrester Wave for iPaaS (Q3 2025):** *Workato praised for "comprehensive connector library and ability to connect to virtually any endpoint."*
- **Gartner MQ for BOAT (2025)**: Named Visionary in inaugural Business Orchestration and Automation Technologies report
- **Gartner MQ for Data Integration Tools (2025)**: Named Visionary, validating connectivity across data integration, automation, and orchestration

Customer Testimonials:

- **Atlassian:** *"We had close to 800 plus customizations and more than 50 integrations. Workato provided the low-code, no code option, and also have like very good APIs and connectors, which we leverage it fully connecting all the scalable workflow. All that in one platform is what Workato provides. And I really love that feature."* (External Video)
- **Box:** *"This initial use case made us realize the power of Workato's ability to integrate with numerous business applications, as well as the ability to easily build those integrations without a deep technical background."* — Marc Fenner, Director of Strategic Partnerships, Box
- **TFG Transfracht:** *"Workato's ability to integrate systems with the most diverse file formats, APIs and protocols"* — Guido Niermann, Head of IT
- **Teveo:** *"In addition, the numerous connectors, such as for NetSuite and Centric, facilitate seamless integration with other systems"* - Seamless Snowflake integration (impossible with previous platform Patchworks) — Alexander Luke Roddis, CTO
- **GetAccept** (Embed Customer): *"After implementing Workato, we're offering pre-built connections and integrations at scale. Now when we get a question whether we connect or integrate with a system, I always say there's a 99.9% chance thanks to Workato."* - Ali Ali, Head of US Sales, GetAccept (Case Study)

Patents:

- Workato holds patents such as *"Late Connection Binding for Bots"* (US20210073051A1), enabling secure, runtime user authentication for any app, unique among integration platforms

Trap-Setting Questions

1. **Select Trap** - Introduce the concept of the value delivered by the differentiator:
   - *How often do you find your teams slowed down because critical systems or data sources can't easily talk to each other?*
   - *What challenges have you faced when trying to integrate new or legacy applications into your existing workflows?*
   - *Tell me about a time when you had to delay or abandon a project because connecting the necessary systems was too complex or time-consuming*

2. **Open Trap** - Tee up and quantify the value for the customer:
   - *"What has been the business impact — such as lost revenue, increased costs, or missed opportunities — when integrations are delayed or fail?*
   - *How much time and resources does your IT or operations team spend maintaining or building custom integrations?*
   - *How do integration challenges affect your ability to respond quickly to new business requirements or market changes?*

3. **Close Trap** - Define the customer Solution Requirement (in customer language) aligned with the differentiator:
   - *What would it mean for your business if you could connect any application, database, or partner system — no matter how new or old — without custom coding or lengthy projects?*
   - *How would your ideal integration solution look if it allowed you to securely connect everything you need, as soon as you need it?*
   - *If you could empower business users to create and manage integrations themselves, while IT maintains control and security, how would that change your operations?*

→ Ref. additional comprehensive list of Enterprise **MCP-specific Trap-Setting Questions** against Boomi/MuleSoft/n8n/Zapier
→ Ask the WSS Coaching Wizard to craft **specific Trap-Setting questions for your deal**

Globally Recognized Customer Success

Comparative	Best against:
	• **MuleSoft** - Enterprise support often requires escalation through Salesforce layers; slower response times for non-critical issues; heavy reliance on professional services • **Boomi** - Customer reviews cite support responsiveness challenges; error reporting and troubleshooting capabilities need improvement per G2 feedback • **Informatica –** Legacy support model; complex ticketing process for cloud vs. on-prem issues • **Jitterbit** - Smaller support organization; limited global coverage • **Zapier** - Self-service focused; limited enterprise support options; no dedicated customer success for most tiers • **Tray.io** - Startup-scale support resources; less mature customer success programs

Description

Workato's Customer Success and Customer Support deliver an exceptional experience designed to reduce operational friction, accelerate value realization, and maximize the return on your orchestration investments. It stands out for:

- **Proactive monitoring and resolution** – System monitoring to identify, diagnose, and resolve issues *before* they impact your business operations, ensuring minimal disruption and maximum uptime
- **Real-time, In-Platform Chat with Human Support** – Instant chat-based support directly within the Workato platform, with seamless escalation to human support agents
- **Industry-Leading Customer Experience** – Exceptional support quality, responsiveness, and customer satisfaction ratings [4.9/5, 98% recommend]
- **Customer Success Services** – Proactively align platform adoption to your strategic business goals; provide onboarding, enablement, adoption guidance, and strategic business reviews to ensure ongoing success

Why it matters: Accelerates time-to-value, reduces operational costs, and mitigates risk, empowering organizations to confidently scale integration, orchestration, and AI initiatives, drive sustained adoption, and rapidly achieve measurable business outcomes.

Customer Value

Customer Value	How the Cloud Native Platform Delivers	Proof Points
↑ **Revenue Impact**	• Accelerates delivery and organizational capability to scale revenue-generating initiatives [faster execution] • Prevents and resolves issues that could delay integration, orchestration, and AI programs • Frees teams to focus on high-value activities instead of troubleshooting	Gartner Peer Insights - Customers highlight rapid time-to-value and ability to quickly automate critical processes: • #1 in Customer Experience & Continued Product Innovation, with the highest customer rankings of any iPaaS vendor (4.9/5 average score, 98% of customers recommend Workato, highest number of ratings) • Top ranked iPaaS leader with special call out to high quality support

↓ Cost	• Reduces IT support overhead and dependence on expensive consultants [lower firefighting costs] • Minimizes downtime through proactive issue resolution • Partners to drive operational maturity for cost-effective projects	**G2 Reports**: Customers consistently rate Workato's support and services as a key factors in lowering operational costs and reducing the need for external consultants
↓ Risk	• Proactive monitoring and fast response minimize risk from integration failures [reduced downtime] • Dedicated support ensures compliance and business continuity during complex migrations • Best practices ensure high compliance with security and audit policies	*"Workato's support team is always available and knowledgeable, helping us avoid costly errors and keep our business running smoothly."* - Gartner Peer Insights

Defensibility

Analyst Reports:

- **Gartner Peer Insights:** Workato is the highest-rated iPaaS vendor for customer experience and support (4.9/5, 98% recommendation rate)
- **Gartner Magic Quadrant for iPaaS (2025):** Workato named a Leader, with special call-outs for customer support and experience: *"Workato customers consistently report high satisfaction with both the product and the vendor in Gartner Peer Insights reviews, with a large percentage indicating they would recommend Workato to peers. Customer reviews frequently cite the platform's ease of use and customer support as key strengths."*
  Gartner approved customer-facing slide - Gartner MQ for iPaaS
- **G2 Reports:** Workato consistently leads in customer satisfaction, support quality, and frictionless adoption.

Customer Testimonials:

- **Gonzaga University:** "When you meet the employees from Workato, it feels like a family, a partnership... When you can find that vendor that is a true partnership, they understand you, you understand them, and you can work collaboratively together, it makes a huge difference."
- **Lucid Motors:** *"If we didn't have this integration backbone, we wouldn't be able to deliver the level of experience our brand promises."* — Sanjay Chandra, Global Head of IT ; 200+ capabilities delivered in 18 months
- **Village Roadshow:** *"We got the news 48 hours before the Taylor Swift documentary launch. So we made a call to Workato and the next day, they bumped our concurrency from 50 to 200. No questions asked. No commercial negotiations. That's what I mean by partnership."* Stuart Wood-Rich, Head of Technology(*Case Study*)
- **Lever:** *"Workato has taken our team to develop integrations in less than half of the time it used to."* — Mohit Mahindroo, Solutions Architect
- **Precisely:** *"Workato's support blows Boomi out of the water. With Workato, we get meaningful support in minutes."* – Dave Shuman, Sr. Director, Data Ops (Source)
- *"Workato's customer support is top-notch. Any time we've had a question or needed help, their team has been quick to respond and always provides clear, actionable guidance."* — **G2 Reviewer**
- *"The support team is very responsive and knowledgeable. They have helped us resolve issues quickly and provided best practices to optimize our integrations."* — **Gartner Peer Insights** Reviewer *"Workato has been a phenomenal partner for us. They have gone above and beyond expectations to ensure we had a good experience and that the project succeeded. The solution itself is reliable and very flexible - which is essential for our business."* (Source)
- Embed Customer **Epicor:** *"We looked at the journey we started and why we chose Workato. This partnership is a*

marriage, you have to work together to sustain it. We needed a partner who truly shared our values, especially that the customer comes first. What triggered our decision was that Workato was always there with us, working alongside us to support our diverse customers." - Umang Bhatt, Principal Product Manager at Epicor (Blog)

Trap-Setting Questions

1. **Select Trap** - Introduce the concept of the value delivered by the differentiator:
   - *How often do unexpected issues disrupt your business operations, and what is the typical impact on your teams?*
   - *When you encounter a technical challenge with your current platform, how easy is it to get timely, expert help?*
   - *What has been your experience with the responsiveness and effectiveness of support from your current vendors?*
   - *How do you define the adoption roadmap and operating model, and how to articulate value/ROI?*
   - *How do you go about opportunities for expansion or faster ROI and prioritize use cases?*

2. **Open Trap** - Tee up and quantify the value for the customer:
   - *How do delays in resolving such issues affect your business outcomes, such as project timelines or customer satisfaction?*
   - *What are the hidden costs — such as lost productivity or increased IT workload — when support is slow or unhelpful?*
   - *Tell me about a time when a lack of proactive support led to a bigger problem or risk for your organization - What was the impact?*
   - *How much time does your team spend figuring things out on their own due to lack of post-onboarding, post-sales/CS support?*

3. **Close Trap** - Define the customer Solution Requirement (in customer language) aligned with the differentiator:
   - *What would it mean for your business if you had access to a support team that could resolve issues quickly and proactively, before they escalate?*
   - *How would your team's productivity and confidence change if you knew expert help was always available and deeply knowledgeable about your environment?*
   - *If you could design your ideal support experience, what would it look like, and how would it help you achieve your business goals?*
   - *How would that improve with a CS partner who helps you optimize usage and measure value, understands/co-creates your roadmap, helps you realize and articulate value/ROI, and supports you to operationalize adoption and success at scale?*

→ Ask the WSS Coaching Wizard to craft **specific Trap-Setting questions for your deal**

Company Innovation, Vision & Leadership

Holistic	Best Against: Boomi, Mulesoft

Description

Workato's vision is built on a fundamental insight: modern business requires unified orchestration of people, systems, data, processes, and AI, not more point solutions creating islands of automation. While legacy vendors treat this as a technology problem, Workato delivers a new layer of orchestration that works with your existing technology and people.

- **Unified Vision** – Automation and workflow orchestration as a team sport between business and IT, enabled by simplicity and a unified language for collaboration
- **Cloud-Native Architecture** – Purpose-built from the ground up with a singular recipe concept that scales from simple automations to enterprise-wide orchestration
- **Founder-Led Innovation** – The founding team that created TIBCO BusinessWorks — the blueprint for modern iPaaS platforms — reunited to build Workato. Four co-founders with 25+ years navigating every wave of integration, now delivering the next generation of enterprise orchestration.
- **Relentless Innovation Pace** – 786 product updates in 2024, influenced by 1,200+ customer ideas; AI Research Lab launched to advance agentic orchestration

Why it matters: Workato's pace of innovation and clarity of vision mean customers are always ahead of the curve, able to transform faster, adopt new technologies like AI, and scale securely while competitors struggle to keep up.

Customer Value

Customer Value	How the Cloud Native Platform Delivers	Proof Points
↑ **Revenue Impact**	Accelerates revenue-generating transformation through market-leading innovation [first to market with key capabilities] Unlocks new business models through unified orchestration without IT bottlenecks	**Village Roadshow:** Zero outages, 66% reduction in operating costs,4x increase in speed to market, with 3 entire divisions migrated to Workato in just 12 weeks. 4,000 lines of code rewritten in less than 100 lines. (Case Study) Case Studies
↓ **Cost**	Reduces development and infrastructure costs through unified platform [8-10x lower TCO vs. legacy] Continuous innovation delivered automatically, no upgrade projects or migration costs	• Boomi TCO comparison • MuleSoft TCO comparison
↓ **Risk**	Future-proofed by working with the market leader navigating technology and market shifts De-risked AI adoption through proven enterprise orchestration foundation [12,000+ customers]	Case Studies

Defensibility

Analyst Reports:

GARTNER® 2025 MAGIC QUADRANT FOR IPAAS - Gartner approved customer-facing slide - Gartner MQ for iPaaS

- **Market Leadership** - Workato recognized as a Leader for the seventh consecutive year and placed furthest in vision among all vendors. Gartner calls Workato the only vendor cited as an orchestration platform, praised for unifying B2B, MDM, RPA, and agentic AI use cases.
- **AI Leadership** - Workato received the highest score for AI Enablement use cases (3.66, ranked #1). Gartner states: *"Workato Orchestration Platform received excellent scores for AI implementation support, addressing needs in both aspects of this market: AI for integrators and integration for AI* [...] *Workato is an essential tool to enable AI across the enterprise, delivering generative AI innovation".*
- **One-platform** for integration/automation/orchestration & company-wide authoring approach - Workato acknowledged as one of the first vendors to meet growing customer demand for combining integration/automation/orchestration, providing support for a company-wide authoring model to iPaaS through flexible governance and an intuitive build experience
- **Market Responsiveness** - Workato had >450 releases in the past year and Gartner expressed confidence in our ability to meet the needs for use cases involving integration/automation/orchestration

Gartner MQ for BOAT (2025): Named Visionary in inaugural Business Orchestration and Automation Technologies report

Forrester Wave for iPaaS (Q3 2025): Named Leader with highest possible scores in Vision, Innovation, and Roadmap

- **SafetyCulture** (Embed customer, ANZ): *"Workato is key to how we innovate and differentiate at every level. With our product integrations powered by Workato, we empower field workers to drive daily improvements in workplace operations - improved safety, quality, risk compliance and sustainability."* - Tim Litton Chief Information Officer @ SafetyCulture (Case Study)
- **F5** - *"Enterprise MCP will fundamentally change the way business gets done."* — Anshu Mishra, Director of Employee Experience

Innovation Metrics:

- 786 product updates in 2024, influenced by 1,200+ customer ideas
- AI Research Lab launched August 2025 to advance agentic orchestration
- 12,000+ global customers (up from 2,000+ in prior years)
- Adam Seligman joined as CTO (ex-AWS, Google, Salesforce)

Patents: Workato Patents Portfolio: Multiple patents protecting core platform innovations

Industry Recognition:

- Forbes Cloud 100 (2025): Selected among top private cloud companies; cohort exceeds $1T combined value
- Deloitte Technology Fast 500 (2025): 6th consecutive year; 279% revenue growth (FY2021-2024)

Trap-Setting Questions

4. **Select Trap** - Introduce the concept of the value delivered by the differentiator:
   - *How does your current vendor's product roadmap and innovation pace impact your ability to stay ahead of technology shifts like AI, agentic orchestration, and emerging business requirements?*
   - *What impact does it have on your business when adopting new capabilities (e.g., whether AI agents, new connectors, or workflow patterns) requires major platform upgrades, migrations, or custom development work?*
   - *What challenges arise from having disconnected islands of automation solutions versus unified orchestration across*

people, systems, data, processes, and AI?
- *What role does your vendor's leadership team's track record play in your confidence about navigating multiple technology waves, e.g. from on-premise to cloud, integration to orchestration, and now to AI?*
- *What concerns do you have about your current vendor's ability to navigate the next wave of enterprise technology without forcing you to rip and replace?*

5. **Open Trap** - Tee up and quantify the value for the customer:
   - *What's the cost and resource impact of platform upgrade projects, regression testing, and migration efforts when your vendor releases major new capabilities or architecture changes?*
   - *What happens to business initiatives when your platform can't quickly adapt to new requirements, whether that's AI adoption, new system integrations, or evolving business models?*
   - *What's the competitive risk when your integration platform keeps you 12-18 months behind market leaders who can rapidly deploy new technologies and business processes?*
   - *How much technical debt and complexity accumulates when you're forced to add point solutions for automation, AI, orchestration, and embedded integrations because your platform doesn't unify these capabilities?*

6. **Close Trap** - Define the customer Solution Requirement (in customer language) aligned with the differentiator:
   - *What would change for your organization if you partnered with a vendor delivering continuous innovation, with hundreds of updates annually without disruptive upgrades, keeping you always at the forefront of capability?*
   - *What would it mean to work with the market leader that analyst firms consistently recognize as furthest in vision and first to deliver emerging capabilities like agentic AI orchestration?*
   - *How would your technology strategy differ with a platform architected from the ground up for unified orchestration, not a collection of acquired products, with a founding team that literally invented modern iPaaS?*
   - *What would become possible if you could eliminate platform upgrade projects entirely while automatically receiving continuous innovation that keeps you ahead of competitors?*

→ Ask the WSS Coaching Wizard to craft **specific Trap-Setting questions for your deal**

Power of 1 - Breadth of Capabilities & Features

Unique	Best against:
	• **Boomi** - Separate modules for integration, workflow automation, and API management; limited AI capabilities • **MuleSoft** - Disjointed tools for API management, integration, and automation; requires extensive developer resources • **Informatica** - Multiple platforms for data integration, lacking unified process automation and AI orchestration • **Jitterbit**, **SnapLogic**, **Celigo** - These vendors lack the breadth, depth, and unified experience of Workato's platform, especially for large-scale, enterprise-wide orchestration.

Description

Power of 1 means Workato delivers all integration, automation, agentic, API management, ETL/ELT, low-code apps, and workflow orchestration needs on a single, unified platform with one architecture, one code base, and one user experience. Customers get everything they need in one place, making it faster and safer to orchestrate their business.

- **Unified Platform** - Combines integration, automation, data orchestration, API management, and AI orchestration in one cohesive system
- **Unified Build Experience -** Intuitive tools for business users combined with full extensibility for developers, the right experience for every skill level
- **Scalable Architecture** - Designed for enterprise-scale operations, ensuring consistent performance as your business grows
- **Robust Governance** - Unified, centralized control with role-based access, audit trails, and compliance features meeting enterprise security standards
- **AI-Native Orchestration** - Embeds AI capabilities throughout the platform to enhance decision-making and orchestrate complex processes across systems

Why it matters: Workato's unified platform reduces the overhead of managing multiple tools, streamlines operations, and fosters collaboration between IT and business teams.

- **Simplicity:** Avoid the complexity and cost of managing multiple tools or vendors
- **Speed:** Faster time-to-value for both IT and business users to build, deploy, and scale
- **Governance & Security:** Centralized control across all integration, orchestration, and AI initiatives
- **Scalability:** Elastic, cloud-native architecture supports unlimited growth

Customer Value

Customer Value	How the Cloud Native Platform Delivers	Proof Points
↑ **Revenue Impact**	• Accelerates time-to-market for revenue-generating initiatives [weeks to minutes for setup] • Enables faster project delivery by eliminating multi-tool complexity • Frees IT budget for strategic projects	**Fullerton Health:** With Workato, the finance reconciliation process is also 87% faster. They are now able to accurately close the books every month, instead of just once annually. (Case Study) **Atlassian:** "Replacing ERP is just not about

		plugging out one system and plugging in another system. It's about integrating with all these other SaaS systems. If we miss one quarter for going live, it adds like another 5 million to our cost. Which wasn't available. And we are a public company. We have to close our books." - Mounika Raj, Senior Engineering Manager (Customer Film)
↓ Cost	• Eliminates need for multiple point solutions [fewer tools, fewer skills required] • Empowers citizen developers, reducing dependence on expensive specialists [8-10x lower TCO vs. legacy]	8-10x lower TCO vs. legacy platforms (Boomi, MuleSoft, Informatica) **Fastly:** *"No one from my team wanted to use Boomi after Workato. Even our BAs are now building integrations."* – Brian Flood, VP IT (Slides) **Grab:** "This impact has been transformative. With Workato, we save thousands of hours of manual labor each year." (Customer Film) **Gonzaga:** "I think our biggest strategic decision that we've made is really focusing on that citizen developer and figuring out a way to really roll this solution out to to our end users. Being able to empower people is just phenomenal, and it's a differentiator. (Customer Film)
↓ Risk	• Centralized security, governance, and compliance in one place [single pane of glass] • Enterprise-grade features: RBAC, data masking, EKM, hourly key rotation [SOC 2, GDPR, CCPA compliant]	SOC 2 Type II, GDPR, CCPA compliance (Security Whitepaper) *"Workato's security and governance are far ahead of legacy vendors."* – Printemps Security Evaluation (PDF)

Defensibility

Analyst Reports:

- **Gartner Magic Quadrant for iPaaS (2025):** Workato recognized 7x MQ Leader, 2x Furthest in Vision, specifically citing breadth of capabilities (B2B, MDM, RPA, agentic AI) and innovation as key strengths: *"Workato was an early adopter of AI-augmented features within its iPaaS offerings. With its release of Workato Genie, it has effectively positioned itself to continue delivering generative AI innovation. Workato is an appealing option for prospects looking to use AI-augmented development features or build AI-augmented integration processes".*
  Gartner approved customer-facing slide - Gartner MQ for iPaaS
- **Gartner Peer Insights:** Workato is the highest-rated iPaaS vendor for customer experience and support (4.9/5, 98% recommendation rate)

- **Gartner MQ for BOAT (2025)**: Named Visionary in inaugural Business Orchestration and Automation Technologies report
- **Forrester Wave for iPaaS (Q3 2025)**: Named Leader with highest possible scores in Vision, Innovation, and Roadmap
- **IDC MarketScape: Worldwide Data Integration Software Platforms 2025:** Named a Major Player as a first time entrant and recognized for our connectivity, ease of use, and ability to support diverse data integration patterns
- **Gartner MQ for Data Integration Tools (2025):** First time entrant and named a visionary for our innovation roadmap, AI augmentation and ease of use

Customer Quotes:

- **Lucid Motors** - *"Workato has been instrumental in bridging our systems and enabling our teams to move at an incredibly fast pace."* — Sanjay Chandra
- **Box** - *"This use case made us realize the power of integrating numerous applications without deep technical expertise."* — Marc Fenner, Director of Strategic Partnerships
- **Village Roadshow** - 98% less code
- Embed Customer **Hive:** *"We often find that the Workato integrations are deep enough that we never need to explore full point-to-point integrations, which means that we just save tons of time in terms of overall engineering investment."* - Eric Maciel (VP of Engineering & Product) (Case Study)
- Embed Customer **Indegene:** *"Implementing the HCP (healthcare professional) validation engine for our client helped us transform a heavily manual, error-prone process into a streamlined, intelligent workflow. Using Workato's Embedded Orchestration capabilities, we designed and deployed an integration-first automation that connected their CRM, MDM, and external validation systems in record time, with monitoring and governance built-in."* - Rajeev Mishra Senior Director, Strategic Solutions, Indegene (Case Study)

Security & Compliance certifications:

- SOC 2 Type II, GDPR, CCPA, IRAP compliance (Security Whitepaper)
- Printemps Security Evaluation: Workato's centralized, multi-tenant, cloud-native architecture and security controls highlighted as a major differentiator (PDF)

Trap-Setting Questions

1. **Select Trap** - Introduce the concept of the value delivered by the differentiator:
   - *How many different tools or platforms does your team currently rely on to handle integration, automation, API management, and data workflows?*
   - *In your experience, what are the implications of coordinating or govern multiple platforms and tools across your organization?*
   - *How do your business and IT teams currently collaborate and scale projects/initiatives without running into tool or platform silos?*

2. **Open Trap** - Tee up and quantify the value for the customer:
   - *What are the business impacts on cost, speed, or risk of having to manage and maintain multiple platforms and tools?*
   - *How does the need to train users on different tools affect your ability to roll out new projects or respond quickly to business needs?*
   - *How does the proliferation of platforms and tools reflect in terms of speed of innovation, operational costs, or security/compliance posture?*

3. **Close Trap** - Define the customer Solution Requirement (in customer language) aligned with the differentiator:
   - *If you could unify all your integration, automation, and workflow needs on a single platform with one user experience and one governance model, how would that change your team's ability to deliver business outcomes?*
   - *What would be the value to your organization if both IT and business users could build, deploy, and manage automations in one place, without switching tools or duplicating effort?*
   - *How important is it for you to have centralized security, compliance, and visibility across all your automation and integration initiatives, regardless of department or use case?*

→ Ask the WSS Coaching Wizard to craft **specific Trap-Setting questions for your deal**

Enterprise MCP

Comparative Differentiator	Best against:
	• **Boomi, MuleSoft, Informatica, Celigo** - Force customers to build and maintain their own MCP infrastructure from scratch • **Microsoft Copilot Studio** - Lacks universal enterprise connectivity and governance for AI agents • **Salesforce Agentforce** - Requires extensive configuration and lacks breadth of system connectivity • **n8n, Zapier** - Consumer-grade AI connectivity without enterprise security or governance

Description

Workato Enterprise MCP provides the industry's first fully managed Model Context Protocol infrastructure for enterprise AI agents. With 100+ pre-built MCP servers, enterprises instantly transform existing business processes, automations, and data into AI-callable services, with enterprise authentication, authorization, and audit logging built-in. No custom development, no infrastructure setup, no security gaps.

Key Capabilities:

- **100+ Pre-built MCP Servers**: Instant AI agent connectivity to enterprise systems (Salesforce, NetSuite, Atlassian, Box, Gmail, and more) with zero setup or infrastructure requirements
- **MCP Gateway**: Secure entry point for AI agents with enterprise authentication and authorization enforced automatically
- **Skills Builder**: Transform existing Workato automations into agent-ready skills in minutes without code rewrite
- **MCP Composition**: Orchestrate complex multi-step workflows as composable AI skills that agents can invoke
- **MCP Registry**: Centralized catalog of available skills with governance controls and access policies
- **MCP Proxy**: Secure, governed connectivity layer between AI agents and enterprise systems with complete audit trails
- **Enterprise Security Built-in**: Authentication, authorization, and audit logging for every AI agent interaction, no separate security implementation needed
- **Zero Custom Development**: Turn existing automations into agent-ready services instantly vs. months of custom infrastructure building

Why it matters: Organizations face a critical choice when deploying AI agents: build MCP infrastructure from scratch (taking months of engineering time and creating security gaps) or leverage Workato's fully managed Enterprise MCP (deploy in minutes with enterprise controls built-in).

Workato is the only platform that solves all four CIO AI challenges simultaneously:

- **AI for All** (platform deployments) → Enterprise MCP provides universal AI connectivity with business context built-in
- **Citizen AI Dev** (business users building AI) → Skills Builder turns safe automations into agent-ready services with governance
- **Departmental AI** (IT-led packaged agents) → 100+ pre-built MCP servers provide consistent, predictable AI infrastructure across all departments
- **Custom Development** (IT building from scratch) → Eliminates months of custom MCP development per AI agent

Competitors force customers to build their own MCP servers, implement security controls, maintain API connections, and handle authentication manually, creating months of delay, security vulnerabilities, and ongoing maintenance burden for every AI agent deployed.

Customer Value

Customer Value	How AI-Native Orchestration, Enterprise MCP & Agentic Platform delivers	Proof Points
↑ **Revenue Impact**	• Faster AI deployment enabling competitive advantage (days vs. months to production) • AI agents driving measurable business outcomes at scale • New revenue opportunities from AI-enabled business models and differentiation	Coupang (#1 e-Commerce in Korea/Taiwan): $20M/yr savings on support through EMCP-powered autonomous support agents with 95%+ accuracy Red Hat (#1 in Enterprise Linux): $90M incremental revenue delivered by 1,936 reps using EMCP-powered real-time CPQ agents Nasdaq (#2 Stock Exchange globally): 27% increase in seller productivity with Workato EMCP-powered AI agents Vodafone (#2 Telco in Europe): Workato EMCP foundational for all AI projects, closing the books 40% faster
↓ **Cost**	• Eliminates months of custom MCP infrastructure development per AI agent • Zero ongoing maintenance burden as Workato handles API changes and infrastructure updates • Reusable AI infrastructure across all departments and use cases	HubSpot (Top CRM provider): EMCP-powered agents across LOBs with 72K GTM requests automated annually, freeing 6,000 hours for sales/ops Perplexity: Powers order-to-cash and revenue analytics for high-growth setting Scale AI: Runs revenue and finance processes in high-growth environment
↓ **Risk**	• Enterprise authentication, authorization, and audit built-in by default, no security gaps • Zero risk from DIY MCP infrastructure with incomplete security controls • Complete governance across all AI agent interactions with centralized policy enforcement	CoreWeave: Runs supplier management processes at scale with real-time visibility and enterprise governance

Defensibility

Analyst Reports:

- **Gartner Magic Quadrant for iPaaS (2025):** Workato recognized 7x MQ Leader, 2x Furthest in Vision, specifically citing breadth of capabilities (B2B, MDM, RPA, agentic AI) and innovation as key strengths: *"Workato was an early adopter of AI-augmented features within its iPaaS offerings. With its release of Workato Genie, it has effectively positioned itself to continue delivering generative AI innovation. Workato is an appealing option for prospects looking to use AI-augmented*

development features or build AI-augmented integration processes".
Gartner approved customer-facing slide - Gartner MQ for iPaaS

- **Gartner MQ for BOAT (2025):** Named Visionary in inaugural Business Orchestration and Automation Technologies report
- **Forrester Wave for iPaaS (Q3 2025):** *Workato cited for "embedded AI copilots and agentic workflow orchestration"*
- **Analysis.tech** - Dave Marcus, Principal Analyst: *"MCP is quickly becoming the de facto way for anyone building agents to integrate with third-party data and applications. By building on its foundation in enterprise integration, Workato's MCP platform delivers high-quality, secure, and well-governed MCP services."*

Customer & Partner Testimonials:

- Theo Chu, Product Manager at **Anthropic**: *"We're excited to see the MCP transforming Workato's approach to enterprise workflow automation. With Workato's Enterprise MCP offering, Claude brings more intelligent, context-aware automation to the enterprise."*
- Alan Braun, VP of Product Ecosystem at **Atlassian**: "Atlassian Rovo MCP Server and Workato's Enterprise MCP together allow customers to unlock autonomous actions across Jira and Confluence with the security, governance, and skills required for AI at scale."
- Ben Kus, Chief Technology Officer at **Box**: *"In collaboration with Workato Enterprise MCP, customers receive secure access to their enterprise content and increaHsed confidence in their AI ecosystem."*
- Laurent Farci, CIO at **.monks**: *"MCP is quickly becoming the standard for how AI works with corporate applications. With Workato Enterprise MCP, organizations can instantly unlock business capabilities with AI in a secure way from day one. Workato already orchestrates critical processes across our business, from sales opportunity management to employee onboarding and IT project management. With Enterprise MCP, we can now transform our business processes into AI-ready services at speed and scale."*
- Angela Stewart, VP of Enterprise Solutions at **Nasdaq:** *"MCP is the universal bridge between AI and enterprise action, unlocking secure, governed, and instant access to business capabilities. Workato is leading the charge in MCP by creating a standard for organizations to turn their systems, data, and processes into AI-ready services."*
- *"Workato's AI Copilot reduced our automation build time by half and eliminated manual errors."* — Global Retail Customer
- **F5** - *"The real value of Enterprise MCP is that it lets AI operate with discipline. You're not just handing over business processes, you're defining the rules, the permissions, and the guardrails so AI can execute safely within them."* — Anshu Mishra
- **Swanson Health** - *"One of the big challenges with raw MCP is governance. Ensuring rights and permissions becomes really hard and really scary." ; "What Enterprise MCP provides is guardrails. It allows AI to fulfill a business process within a defined set of rules." ; "With pre-built connectors, you get an out-of-the-box client library that already speaks MCP. You don't have to focus on infrastructure, you focus on the core business logic."* — Kevin Wolf, Senior Director of Information Technology
- Leandro Morelato, Senior Full Stack Developer at **TrustArc** (Embed customer): *"Workato Enterprise MCP allows us to connect our AI agents to the enterprise systems and data our customers rely on. Before, those agents operated in silos, but with MCP, we can unlock richer insights, deliver more intelligent experiences, and focus our efforts on driving innovation. Even better, because Workato handles all the heavy lifting, we can easily integrate MCP into our existing systems with minimal effort and maximum flexibility."*
- Anand Narasimhan, Chief Technology Officer at **S-Docs** (Embed customer): *"Workato Enterprise MCP will enable SaaS platforms like ours to connect agents to the systems and data that matter most — securely and at scale."*
- SOC 2 Type II, GDPR, CCPA, IRAP compliance (Security Whitepaper)

Trap-Setting Questions

1. **Select Trap** - Introduce the concept of the value delivered by the differentiator:
   - *What approach are you taking to connect your AI agents to enterprise systems like Salesforce, NetSuite, or Atlassian, and how much custom infrastructure development does that require for each AI agent you deploy?*
   - *When you deploy AI agents that need to interact with business systems and data, what controls do you have in place for enterprise authentication, authorization, and audit logging across all agent interactions?*
   - *How much engineering time and effort goes into building the connectivity layer, security controls, and API integrations needed before each AI agent can actually perform actions in your enterprise systems?*
   - *What challenges arise when you need to transform existing business processes and automations into AI-callable services that agents can securely invoke with proper governance?*
   - *How are you addressing the gap between AI platform capabilities and the secure, governed connectivity to enterprise systems that AI agents need to deliver actual business outcomes?*

2. **Open Trap** - Tee up and quantify the value for the customer:
   - *What's the cost and timeline impact when each AI agent deployment requires months of custom MCP infrastructure development, security implementation, and API maintenance work?*
   - *How many AI initiatives are delayed or abandoned because building the secure connectivity infrastructure between agents and enterprise systems is too complex or resource-intensive?*
   - *What security and compliance risks emerge when teams build their own agent-to-system connectivity without centralized authentication, authorization, and audit capabilities?*
   - *What's the ongoing maintenance burden when your teams must manually handle API changes, security updates, and infrastructure management for every AI agent's system connections?*
   - *How does the inability to reuse AI infrastructure across departments and use cases impact your overall cost and speed of AI adoption?*

3. **Close Trap** - Define the customer Solution Requirement (in customer language) aligned with the differentiator:
   - *What would change for your AI strategy if you could deploy AI agents with instant connectivity to 100+ enterprise systems with zero infrastructure setup or custom development required?*
   - *How would your AI adoption accelerate if you could transform existing business automations into agent-ready skills in minutes, with enterprise security, governance, and audit logging built-in by default?*
   - *What would it mean if you could deploy AI agents in days instead of months by eliminating the need to build MCP servers, implement security controls, maintain API connections, and handle authentication manually for each agent?*
   - *How valuable would it be to have a single, fully managed MCP infrastructure that solves all four CIO AI challenges simultaneously — e.g., platform deployments, citizen AI development, departmental AI, and custom development — with consistent security and governance?*

→ Ref. additional comprehensive list of Enterprise **MCP-specific Trap-Setting Questions** against Boomi/MuleSoft/n8n/Zapier
→ Ask the WSS Coaching Wizard to craft **specific Trap-Setting questions for your deal**

Enterprise Agentic AI

Comparative Differentiator	Best against:
	• **Microsoft Copilot Studio, Salesforce Agentforce** - Only answer questions, don't execute workflows • **MuleSoft, Boomi** - No agentic capabilities or autonomous workflow execution • **Zapier, n8n** - Consumer-grade automation without enterprise agent governance • **Point AI solutions (CrewAI, AutoGen, LangChain)** - Lack enterprise connectivity, governance, and observability

Description

Workato's Agentic Platform enables enterprises to build, deploy, and govern AI agents that autonomously complete end-to-end business processes across systems with enterprise security, observability, and human-in-the-loop controls built-in. Unlike chatbots that only answer questions, Workato agents execute complete workflows, orchestrate multi-step processes, and drive measurable business outcomes.

Key Capabilities:

- **Workato Genies**: Pre-built AI agents (Sales Genie, IT Genie, Support Genie, HR & Recruiting Genie, CX Genie, Marketing Genie, Security Genie) that autonomously complete end-to-end processes with built-in KPIs, governance, and human-in-the-loop controls, deploying in days instead of months
- **Agent Studio**: intuitive builder for creating custom AI agents that reason, interact, and act across applications and data with visual development experience, with no extensive prompt engineering or custom code required
- **Workato GO**: Unified interface combining enterprise search, Deep Action™ orchestration, AI agent engagement, and performance monitoring in one context-aware experience, eliminating tool-switching between search, chatbots, workflow execution, and monitoring
- **Action Board**: Business-user dashboard for tracking KPIs, engaging with AI agents, and measuring business impact without SQL queries or IT dependency
- **Agent Trust**: Policy-based governance ensuring agents operate within defined security boundaries with enterprise-grade authentication, authorization, and complete audit trails enforced automatically across all AI agents
- **Agent Knowledge Graph**: Real-time contextual awareness across all enterprise systems enabling intelligent agent decisions with complete business context, automatically maintaining relationships across documents, people, events, business entities. Our knowledge bases can crawl information from a large set of enterprise data sources (e.g., Google Drive, Salesforce, Confluence etc.) and create a knowledge graph that is permission aware, identifies relationships and has rich context about the enterprise business entities. This ensures that agents respond with accurate and reliable information and can be trusted to act against enterprise applications. This is a key differentiator vs using traditional RAG or vector stores.
- **Autonomous Coordination**: Agents complete processes end-to-end across CRM, ERP, HRIS, and ITSM without constant human oversight
- **Scalable by Design**: Built on Workato's elastic, serverless runtime with no infrastructure burden

Why it matters: Microsoft copilots and Salesforce assistants only answer questions, i.e. they can't create tasks, update systems, or execute multi-step workflows. Workato Genies and custom agents execute complete business processes end-to-end: from lead qualification to opportunity scoring to proposal generation to IT ticket resolution to renewal

automation, with governance, KPIs, and audit trails built-in.

Traditional agentic platforms require extensive prompt engineering, custom code, and separate development environments. Workato enables business and IT teams to build production-ready agents in days with low-code tools, pre-built templates, and enterprise security automatically applied.

Workato agents take on coordination responsibilities that previously required humans: monitoring systems, acting on signals, completing workflows, and driving measurable KPIs, all governed by IT, visible to stakeholders, and scalable across departments.

Customer Value

Customer Value	How AI-Native Orchestration, Enterprise MCP & Agentic Platform delivers	Proof Points
↑ **Revenue Impact**	• Accelerates revenue-generating transformation through AI-powered autonomous execution (30-50% faster deployment) • AI agents unlock new business models by orchestrating complex, cross-system processes at scale • Measurable KPIs with built-in performance tracking and business impact measurement	Global Financial Services Firm: Used Workato's Agentic AI to automate KYC document processing, reducing turnaround time by 60% Customers report 30-50% faster automation deployment with AI-assisted development
↓ **Cost**	• Minimizes resource waste via AI-driven recommendations (eliminates redundant steps, reduces compute costs) • Optimizes workflows for cost, performance, and security automatically • Reduces manual reviews and administrative overhead freeing teams for strategic work	Samsara: IT Agent automating ~30% of IT helpdesk, enabling team to engage in higher-level work (Customer Video) Persefoni: 3x CS productivity increase without headcount increase (Customer Story)
↓ **Risk**	• Flags security and compliance risks in real-time (proactive detection) • Ensures agents follow best practices, reducing production incidents • AI-driven documentation improves auditability and governance	Agent Trust with policy-based controls ensures compliance Complete audit trails built-in for all agent actions

Defensibility

Analyst Reports:

- **Gartner Magic Quadrant for iPaaS (2025):** Workato recognized 7x MQ Leader, 2x Furthest in Vision, specifically citing breadth of capabilities (B2B, MDM, RPA, agentic AI) and innovation as key strengths: *"Workato was an early adopter of AI-augmented features within its iPaaS offerings. With its release of Workato Genie, it has effectively positioned itself to continue delivering generative AI innovation. Workato is an appealing option for prospects looking to use AI-augmented development features or build AI-augmented integration processes".*
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- **Gartner MQ for BOAT (2025):** Named Visionary in inaugural Business Orchestration and Automation Technologies report

- **Forrester Wave for iPaaS (Q3 2025):** *Workato cited for "embedded AI copilots and agentic workflow orchestration"*
- **Analysis.tech** - Dave Marcus, Principal Analyst: *"MCP is quickly becoming the de facto way for anyone building agents to integrate with third-party data and applications. By building on its foundation in enterprise integration, Workato's MCP platform delivers high-quality, secure, and well-governed MCP services."*

Customer & Partner Testimonials:

Samsara: " we talked about in the keynote are things like the IT Genie
And how we've doubled our ability to drive automation and IT service delivery, which is fantastic." Stephen Franchetti, CIO, Samsara (News Story, Video)

Persefoni "Customer success team can now support three times as many customers as they did previously at the same level of service." Mike Flynn, CIO Persefoni (Customer Story + Film)

Trap-Setting Questions

4. **Select Trap** - Introduce the concept of the value delivered by the differentiator:
   - *What capabilities do your current AI assistants or copilots have beyond answering questions (e.g., can they create tasks, update systems, or execute multi-step workflows across your enterprise applications)?*
   - *When you need AI agents to complete end-to-end business processes like lead qualification, opportunity scoring, IT ticket resolution, or renewal automation, what capabilities are you currently missing?*
   - *How much custom code, prompt engineering, and separate development environments are required when your teams build AI agents that need to autonomously execute workflows across systems?*
   - *What governance, security, and audit capabilities do you have in place when AI agents interact with enterprise systems and complete business processes without constant human oversight?*
   - *How are your AI agents currently measuring and tracking business outcomes with KPIs, and how do business users engage with agents and monitor their performance without SQL queries or IT dependency?*

5. **Open Trap** - Tee up and quantify the value for the customer:
   - *What's the impact when your AI assistants can only answer questions but cannot autonomously complete the actual work, e.g. creating tasks, updating records, or executing workflows across CRM, ERP, HRIS, and ITSM?*
   - *How much time and effort goes into building custom AI agents because your platform requires extensive prompt engineering, custom code, and lacks pre-built agents with built-in KPIs and governance?*
   - *What coordination responsibilities currently require humans to monitor systems, act on signals, and complete workflows that AI agents could potentially handle autonomously with proper governance?*
   - *What's the cost of manual reviews, administrative overhead, and resource allocation when your teams cannot delegate end-to-end process execution to AI agents with enterprise security and observability built-in?*
   - *How many AI initiatives are delayed or limited in scope because you lack the ability to build production-ready agents in days with low-code tools and enterprise security automatically applied?*

6. **Close Trap** - Define the customer Solution Requirement (in customer language) aligned with the differentiator:
   - *What would change for your organization if AI agents could autonomously complete end-to-end business processes across systems with enterprise security, governance, and complete audit trails built-in by default?*
   - *How would your AI strategy accelerate if you could deploy pre-built AI agents for sales, IT, support, HR, CX, marketing, and security that deliver measurable KPIs in days instead of months of custom development?*
   - *What would it mean if business and IT teams could build production-ready AI agents using low-code tools with no extensive prompt engineering required, while maintaining policy-based governance across all agent actions?*

- *How valuable would it be to have AI agents that take on coordination responsibilities previously requiring humans (e.g., monitoring systems, acting on signals, completing workflows, driving measurable KPIs), all governed by IT and visible to stakeholders?*

→ Ref. additional comprehensive list of Enterprise **MCP-specific Trap-Setting Questions** against Boomi/MuleSoft/n8n/Zapier
→ Ask the WSS Coaching Wizard to craft **specific Trap-Setting questions for your deal**

Zero Downtime Upgrade

Unique	Best against:
	• **MuleSoft** - Requires scheduled maintenance windows for platform upgrades, risking downtime. For runtime upgrades, it forces regression testing and potential refactoring of existing integrations • **Boomi** - Customers often report planned outages during platform updates. • **Informatica** - Maintenance windows and upgrade-related disruptions are common. • **Celigo** - May require customer-side intervention or experience brief interruptions during upgrades

Description

Zero Downtime Upgrade means Workato rolls out new features, security patches, and platform updates without any service interruption for customers. Upgrades are performed transparently, so automations, integrations, and orchestrations continue running with no impact on availability or performance.

- **Fully serverless, cloud-native architecture:** Enables seamless updates with zero customer impact
- **Always-on delivery:** 700+ platform updates/year with no disruption to live operations
- **No version management required:** Recipes run continuously across upgrades with full backward compatibility and no regression testing
- **Auto-failover and Multi-AZ resilience:** Built-in high availability across global cloud regions
- **No maintenance windows:** No customer scheduling or pre-release coordination required

Why it matters: Teams rely on their automations and AI agents to run 24/7 across mission-critical systems. Downtime means lost revenue, SLA risk, and operational delays. With Workato, you never need to pause production to stay current.

Customer Value

Customer Value	How the Cloud Native Platform Delivers	Proof Points
↑ **Revenue Impact**	• No lost business hours or transaction failures due to platform upgrades [continuous operations] • No disruption to revenue-generating workflows such as product launches, customer onboarding, and sales automations • Teams deliver new capabilities without delay.	Workato's published uptime and incident history (status.workato.com) show continuous service during upgrades.
↓ **Cost**	• Reduced hidden labor costs tied to platform maintenance and upgrade cycles [no upgrade planning, testing, or recovery] • IT focuses on strategic initiatives rather than downtime management	No regression testing required no dedicated upgrade teams needed
↓ **Risk**	• Eliminates risk of failed upgrades causing revenue loss and SLA violations [99.98% uptime SLA] • Critical processes (end of quarter, holiday sales, M&A transitions) run uninterrupted	Workato's architecture supports redundant clusters and live failover, as detailed in the Security Whitepaper (source)

Defensibility

Analyst Reports:

- **Gartner Magic Quadrant for iPaaS (2025):** Workato is recognized for its robust cloud-native architecture and high availability, with specific mention of seamless upgrades and minimal customer disruption.
  Gartner approved customer-facing slide - Gartner MQ for iPaaS

Platform Metrics:

- 99.98% uptime SLA
- 700+ platform updates annually with zero customer disruption
- Disaster recovery tested quarterly

Customer Testimonials:

- *"We've never experienced a single minute of downtime due to upgrades on Workato. Our automations just keep running."* — IT Director, Global Retailer
- **Wirewheel** (Embed customer): *"I have confidence in the people we work with from Workato - there's never a moment where aside from PTOs, emails don't go unanswered, they're very responsive with that. I have standups with reps - it's been really great and comfortable is probably the best word. It's not something we worry about."* - Mark Farmer, Senior Vice President of Technology, Wirewheel
- **Village Roadshow** - *"One of the things Workato did to us is that now our dashboards are very boring – no spikes, no outages. Workato did not even break a sweat with major blockbuster releases like Barbenheimer, the biggest weekend for Australian cinema since 2019"* — Arul Arogyanathan, Chief Innovation Officer

Certifications:

- SOC-1 Type II and SOC-2 Type II compliance, with annual third-party penetration testing and continuous monitoring, as documented in the Workato Security Whitepaper

Trap-Setting Questions

1. **Select Trap** - Introduce the concept of the value delivered by the differentiator:
   - *How do planned or unplanned system downtimes during upgrades impact your business operations or customer experience?*
   - *How do platform runtime upgrades impact your business planning?*
   - *What challenges have you faced in the past when scheduling or executing upgrades for your integration or automation platforms?*
   - *How do you currently manage the risk of business disruption, regression testing, and potential refactoring, when your integration platform requires maintenance or updates?*

2. **Open Trap** - Tee up and quantify the value for the customer:
   - *How do you estimate the potential revenue or productivity lost during even short periods of downtime caused by upgrades?*
   - *How do you estimate the potential impact of regression testing and resource allocation, due to changes in your platform runtimes?*
   - *What additional costs or resources are required from your IT or business teams to plan, test, and recover from upgrade-related outages?*
   - *How do upgrade-related disruptions affect your ability to deliver on critical business initiatives or meet SLAs with your stakeholders?*

3. **Close Trap** - Define the customer Solution Requirement (in customer language) aligned with the differentiator:
   - *How important would it be for your business to have a platform where upgrades happen seamlessly, with zero impact on your ongoing operations?*
   - *What would it mean for your team if you could eliminate the need to plan for, communicate, or recover from downtime during upgrades?*
   - *If you could guarantee continuous availability and uninterrupted operations even during upgrades, how would that change your approach to innovation and IT resource allocation?*

→ Ask the WSS Coaching Wizard to craft **specific Trap-Setting questions for your deal**

Composable Platform

Unique	Best Against:
	• **MuleSoft** - Has reusable APIs but requires heavy developer lift; lacks unified workflow orchestration for business users • **Boomi** - Strong in integration but less capable in workflow orchestration and business user empowerment • **Point Automation Tools (Zapier, Tray.io, Celigo)** - Have templates and simple automations but lack orchestration sophistication for enterprise workflows (branching, approvals, long-running processes, governance at scale) • **Legacy BPM (Pega, Appian)** - Have orchestration but lack modern composability, connectivity, and low-code accessibility

Description

Workato's Composable Platform combines modular, reusable components with advanced orchestration capabilities, enabling enterprises to rapidly assemble, adapt, and scale business solutions without rebuilding from scratch.

Composability alone doesn't solve business problems. You need both the building blocks and the ability to orchestrate them into sophisticated, enterprise-grade workflows. Workato uniquely delivers both.

Modular, Reusable Components

- **Callable Recipes:** Package logic once, invoke from anywhere across the platform
- **Community Library:** 900,000+ pre-built recipes, templates, and accelerators
- **Enterprise MCP Skills:** Turn existing automations into AI-ready services instantly
- **Reusable Agents:** Build agents once, expose as MCP servers for reuse across the enterprise
- **Connector Ecosystem:** 1,200+ connectors reaching 14,000+ unique applications with deep, reusable actions

Orchestration Capabilities

- **Visual Orchestration Builder:** Low-code canvas for composing advanced workflows across systems
- **Branching, Loops, Conditional Logic:** Build flexible, non-linear workflows with ease
- **Human-in-the-Loop**: Integrate approvals, exceptions, escalations, and manual reviews
- **Agent Orchestration:** Coordinate AI agents alongside humans and systems within unified workflows
- **Event-Driven Execution:** React in real-time to events, webhooks, or state changes
- **Cross-System Coordination:** Orchestrate end-to-end processes across CRM, ERP, HRIS, ITSM

Why it matters: Integration solves connectivity. Composability provides the building blocks. But orchestration drives outcomes. Workato lets you define how work flows across teams, tools, and data, handling exceptions, human decisions, and conditional logic natively. Rapidly assemble, iterate, and evolve capabilities as your business changes.

Customer Value

Customer Value	How the Cloud Native Platform Delivers	Proof Points
↑ **Revenue Impact**	• Rapid launch of revenue-driving initiatives through composable, reusable workflows [faster time-to-market] • Decouple front-end innovation from back-end constraints	**Jollibee** (Global F&B): 88% increase in processing efficiency, 100% adherence to controls, faster innovation by decoupling front-end from ERP back-end. (Story Slide)

		Fullerton Health: 200 man hours of time savings a month, and a substantial 37% reduction in claims processing cost. This system now also guarantees same day processing of claims, even at peak load. (Case Study) Case Studies
↓ **Cost**	• Reduce build effort through reusable components [build once, use everywhere] • Teams automate more with fewer resources by composing from existing recipes and connectors	**Samsara:** Automate 30% of IT helpdesk, beating what was possible with another industry leader (Customer Film) Case Studies OrCA Case Studies **Unity:** Saved $19M from consolidation and modernization. (Customer Story)
↓ **Risk**	• Centralized governance across all composed workflows [auditable, compliant] • Reusable, tested components reduce errors vs. building from scratch	• SOC 2 Type II, GDPR, HIPAA compliance. • 100% adherence to business controls in orchestrated processes (Jollibee). • Real-time monitoring and error handling built-in (documentation)

Defensibility

Analyst Reports:

- **Gartner Magic Quadrant for iPaaS (2025):** Workato praised for *"robust process orchestration embedded in a unified platform"* and recognized as a Leader with the furthest in vision placement for its ability to unify integration, automation, and experience orchestration in a single platform.
  Gartner approved customer-facing slide - Gartner MQ for iPaaS
- **Gartner MQ for BOAT (2025):** Named Visionary in inaugural Business Orchestration and Automation Technologies report
- **Forrester Wave for iPaaS (Q3 2025):** Recognized as Leader for combining integration, automation, and orchestration in a single low-code experience
- **Work Automation Index 2024**: 55% of active workflows include branching, human interaction, or conditional routing

Customer Testimonials:

- **Samsara:** *"The beauty of it is it's using the Workato framework for agents. But it's using the prepackaged IT agent application. To enable us to accelerate the deployment freeing up the, the support agent's time in the help desk so that they could focus on higher value, higher order work within the organization."* Stephen Franchetti (Customer Film)
- **Vodafone** - *"Workato enabled us to build a modular, API-first architecture that rewires the business for growth."* — Florin Crangă, Principal Enterprise Architect
- **Delamode International Logistics** - *"The speed and flexibility of Workato meant we could challenge ourselves to think differently about integration."* — Chris Dodd, Head of IT
- **Jollibee Foods Corporation:** *"Workato enabled us to orchestrate SAP, SuccessFactors, and Microsoft Teams in a single workflow, improving efficiency by 88% and allowing innovation without backend disruption."*
- **Chargebee** (Embed customer): *"The number of connectors coupled with custom HTTPS requests and error handling makes it possible for any technical expertise to write a recipe that integrates multiple systems"* - Mark McClenahan, Sr.

Product Manager at Chargebee

- **The Lookout Way** (Embed customer): *"We find that many care businesses have so many unique requirements that they go out and build their own, extremely expensive custom system. Even when they do, those custom systems often fall short due to the intricate complexities of home care. Now that Workato's capabilities are available within Lookout, home care providers get the reliability of Lookout's all-in-one, easy-to-use, by care, for care, solution, but can also customise it to all their unique and varied business needs. This can save them hundreds of thousands of dollars."* - Matthew Cowley, Head of Demand and Revenue (Case Study)

Certifications:

- SOC-1 Type II and SOC-2 Type II, GDPR, CCPA, IRAP compliance (Security Whitepaper)

Customer Results

- **Unity:** $19M total cost savings, 52,000 hours freed annually, 236 applications eliminated, 8X ROI (Customer Story)
- **DB Cargo/TFG Transfracht:** 300+ automated workflows managed by 1.5 employees; what took months now takes days (Video)
- **Atlassian:** 25,000 hours saved annually; workflow build time reduced from 2-3 months to less than 3 weeks; 49 finance team members building automations (Case Study)
- **Broadcom:** 6,500 hours saved per month; IT team size constant despite 43% workforce increase (Case Study)

Trap-Setting Questions

1. **Select Trap** - Introduce the concept of the value delivered by the differentiator:
   - *How often do you find yourself rebuilding logic that already exists elsewhere in your organization because you can't easily reuse existing components across different workflows?*
   - *How many different tools do you currently need to orchestrate end-to-end business processes that require branching logic, approvals, exception handling, and coordination across multiple systems?*
   - *What challenges do you face when front-end teams want to innovate quickly but are constrained by the complexity or rigidity of your back-end systems like ERP or legacy applications?*
   - *When business requirements change, how much effort does it take to adapt existing automations versus rebuilding entirely new workflows from scratch?*

2. **Open Trap** - Tee up and quantify the value for the customer:
   - *How much development time and cost could you save if you could build business logic once as a reusable component and invoke it from anywhere, rather than rebuilding similar workflows repeatedly?*
   - *What's the impact on time-to-market when teams need to coordinate multiple separate tools for integration, automation, workflow orchestration, and approvals instead of working from a unified platform?*
   - *How many business initiatives are delayed or abandoned because your current platform can't handle the orchestration complexity of real-world enterprise workflows with long-running processes, human reviews, and conditional branching?*
   - *What's the efficiency impact when teams build the same integration logic or business rules multiple times across different projects because you lack a centralized library of reusable components?*

3. **Close Trap** - Define the customer Solution Requirement (in customer language) aligned with the differentiator:
   - *How valuable would it be to have a single platform where you can both compose workflows from reusable building blocks AND orchestrate sophisticated business processes with branching, approvals, and exception handling, without needing separate tools?*
   - *What would it mean for your innovation velocity if teams could rapidly assemble new capabilities by composing from a library of pre-built, tested components while keeping back-end systems stable?*

- *If teams could build business logic once and instantly reuse it across hundreds of use cases with centralized governance, how would that transform your automation strategy and resource allocation?*
- *How important is it to orchestrate not just system-to-system integrations, but also coordinate AI agents alongside humans within unified workflows that handle escalations, manual reviews, and event-driven execution?*

→ Ref. additional comprehensive list of Enterprise **MCP-specific Trap-Setting Questions** against Boomi/MuleSoft/n8n/Zapier
→ Ask the WSS Coaching Wizard to craft **specific Trap-Setting questions for your deal**

Flexible CX Models

Comparative	Best against:
	• **Boomi** - Limited embedded capabilities; less flexible end-customer deployment models • **MuleSoft** - Embedded offerings require significant development effort; less turnkey for ISVs • **Tray.io** - Embedded product exists but lacks depth of engagement models and enterprise governance;lacks managed service and collaborative workspace options entirely • **Celigo** - Focused on standard integrations; limited flexibility for evolving customer programs • **Paragon/Prismatic** - Purpose-built for embedded but lack the platform depth, AI capabilities, and enterprise scale of Workato • **Merge** - Unified API architecture fundamentally limits customer experience options; no managed service, no visual workflow builders, no way to support sophisticated, unique automation needs

Description

Flexible CX Models enable ISVs and SaaS companies to deliver integration experiences to their end-customers exactly how they want, with the flexibility to evolve their program over time.

Workato gives you control over what your end-customers see, how they engage, and how much access they have. Offer integrations as a fully managed service, standard quick-deploy templates, custom-built solutions, or a fully self-service embedded experience, all from a single platform that scales with your business.

Key Capabilities:

- **APIs & iFrames:** Build custom experiences or embed Workato directly into your product
- **Multi-Tenancy:** Isolate end-customer environments with granular access controls
- **Custom Branding:** Fully customize the experience to match your product identity
- **Quick Deploy Recipes:** Build once, deploy to unlimited customers instantly
- **Flexible Role-Based Access:** Control exactly what each end-customer can see and do

Why it matters: Your integration program needs to evolve as your business grows. Start with managed services for early customers, add self-service templates as you scale, and open up the full platform for sophisticated customers who want to build their own. Workato is the only platform that supports the full spectrum without switching vendors.

Customer Value

Customer Value	How the Flexible CX Models delivers	Proof Points
↑ **Revenue Impact**	• Expand addressable market by serving customers across all segments and technical sophistication levels [extended TAM] • Build once, deploy to unlimited customers [infinitely scalable] • Grow and evolve your integration program alongside your core product	**GUIDEcx** - By fully embedding Workato in a self-service model, GUIDEcx has increased win rates with complex, high-value prospects by 15%, driven 20% higher ACV, and improved retention by 25% by enabling customers to independently manage deep, scalable integrations; creating stickier, longer-lasting relationships that fuel sustained revenue growth.

		(Case Study)
↓ **Cost**	• Low/no development effort for standard integrations [day-zero deployment] • Reduced tech resources needed to implement customers • End-customers can deploy and update recipes without vendor involvement	CSOD: Sales teams prescribe the right solution by customer type; PS teams implement efficiently with perfect-fit ICP customers (Integration Overview) **SlapFive** - By embedding Workato and standardizing integrations through a self-service library of pre-built automations, SlapFive dramatically reduced engineering and implementation costs, shortening sales cycles, accelerating onboarding, and enabling non-technical teams to deliver integrations in minutes instead of months. (Case Study)
↓ **Risk**	• Prevent customer churn by evolving your program to meet changing needs [program evolution] • Stay ahead of competitive erosion with flexible, evolving offerings • Reduce dependency on internal resources to manage customer integrations	**CSOD** - Built criteria and procedures for servicing all customer types, from SMB to F100, with appropriate engagement model for each **TalentReef** (by Mitratech) has *"accelerated and increased revenue, sped up implementations and eliminated complaints, reduced churn, and repurposed engineering resources."* (Case Study)

Defensibility

Analyst Reports:

- **Gartner Magic Quadrant for iPaaS (2025):** Only Leader named for Embedded iPaaS. Recognized for 7th consecutive year as Leader and furthest in vision. Gartner cites strengths in product versatility, security, breadth of capabilities, and AI leadership. (Gartner approved slide)
- **G2 Reports:** Leader in multiple Grid Reports with substantial Satisfaction and Market Presence scores (G2 Reports)
- **Gartner Peer Insights:** Highest-rated iPaaS vendor [4.9/5, 98% recommend] with special recognition for ease of use and support quality

Customer Results:

Cornerstone OnDemand (CSOD) - Fully Embedded

- Needed to serve a diverse customer base from SMB to F100 with varying technical resources. Built four engagement tiers: (1) managed services with no customer access, (2) standard quick-deploy templates customers activate in hours, (3) custom integrations via PS for large customers, (4) fully embedded self-service for qualified customers.
- Result: Sales teams prescribe the right model; PS teams implement efficiently with right-fit customers.

ClickUp - Blackbox + Fully Embedded

- Mid-market customers use quick deployments; enterprise customers get blackbox custom integrations.
- Result: 10 new customers implemented with zero overhead vs. 3 hours dev effort each. Scales to hundreds of customers annually with no additional dev capacity.

Onelogin (Embed customer): *"Leveraging a product like the Workato Embedded Platform has changed our ability to meet the requests of OneLogin customers. With whitelabeling and easy template customization, we launched Workato as OneLogin Workflows and created a solution that fits seamlessly with our product and allows us to offer process automation at scale."* - Oscar Rodriguez Jr., Director of Professional Services, OneLogin

Persefoni - *"With the CS Genie, our team can now support 3x more customers while maintaining the same high level of service."* — Mike Flynn, CIO

GUIDEcx - *"An integrated customer is a sticky customer."* — Chris Haleua, Former VP Product ; 15% higher win rate, 20% higher ACV

Trap-Setting Questions

1. **Select Trap** - Introduce the concept of the value delivered by the differentiator:
   - *How does your current integration delivery model limit your ability to serve different customer segments, from SMBs needing turnkey solutions to enterprises requiring custom integrations?*
   - *What challenges arise when your integration program needs to evolve, moving from managed services to self-service or adding new engagement models?*
   - *How much development effort goes into deploying integrations for each new customer, and how does this impact your scalability?*
   - *When customers need different access levels — from fully managed to self-service — how do you accommodate these needs without maintaining multiple platforms?*

2. **Open Trap** - Tee up and quantify the value for the customer:
   - *How many deals have you lost because you couldn't support customers' preferred integration engagement model, e.g. white-labeled self-service, managed services, or hybrid?*
   - *What development costs and time go into onboarding each customer with integrations, and how would near-zero implementation costs impact your acquisition capacity?*
   - *How much technical capacity could you reallocate to core product development with build-once-deploy-unlimited capabilities versus custom implementation per customer?*
   - *What's the revenue impact when your integration program can't evolve to meet changing expectations or match competitors' offerings?*

3. **Close Trap** - Define the customer Solution Requirement (in customer language) aligned with the differentiator:
   - *How important is having a single platform supporting all integration delivery models, from fully managed to self-service, without switching vendors?*
   - *What would it mean if sales and CS teams could prescribe the right integration model for each customer type (i.e., SMB, mid-market, enterprise) from the same platform?*
   - *If you could build once and deploy to unlimited customers with white-labeling and granular access control, how would that change your integration strategy?*

→ Ref. additional comprehensive list of Enterprise **MCP-specific Trap-Setting Questions** against Boomi/MuleSoft/n8n/Zapier
→ Ask the WSS Coaching Wizard to craft **specific Trap-Setting questions for your deal**

Federated Model

Comparative	Best against:
	• **MuleSoft** - Developer-first; limited support for business users or distributed ownership • **Boomi** - Central IT-focused; less suited for empowering lines of business to build securely. • **Zapier** - Business-user friendly, but no enterprise-grade visibility, controls, or team management. • **Tray.io** - Developer-centric; lacks fine-grained permissioning and organizational boundaries. • **Informatica** - Focused on IT-led integration; less support for business user empowerment.

Description

Workato enables organizations to scale automation through a federated model, where IT retains governance and visibility while business units, departments, and regional teams build and manage their own workflows safely and independently.

Key Capabilities:

- **Workspace architecture** – Segments teams, regions, or business units into isolated build and run environments
- **Granular RBAC** – Assigns roles and permissions by workspace, asset, or environment for fine-grained control
- **Admin tools for IT** – Centralized monitoring, recipe analytics, usage policies, and approval workflows
- **Shared assets and guardrails** – Let IT distribute curated connectors, templates, and patterns for reuse
- **Auditability by design** – Logs, version history, and access records for compliance and security reviews

Why it matters: Without a federated model, organizations hit a ceiling: either IT becomes a bottleneck, or governance breaks down. Workato enables both autonomy and control, so teams can scale orchestration responsibly.

- **Empowers business agility** without sacrificing IT control.
- **Reduces shadow IT** by providing safe, governed self-service.
- **Accelerates innovation** at scale with more teams automating faster and with less risk

Customer Value

Customer Value	How the Cloud Native Platform Delivers	Proof Points
↑ **Revenue Impact**	• Faster time-to-market for revenue-generating initiatives [30-50% faster rollout vs. centralized models] • Enables business units to respond rapidly to market changes and customer needs	Customers report 30–50% faster rollout of automations compared to centralized models. More than 50% of Workato customers use the platform in four or more Lines of Business; 37% in five or more, 44% of Workato builders (developers) are business experts and 56% are IT experts (source: Work Automation Index 2024)
↓ **Cost**	• Reduces IT workload and bottlenecks [up to 40% reduction in IT support tickets] • Lowers cost of automation by enabling non-technical users • Minimizes need for custom	Customers cite up to 40% reduction in IT support tickets related to automation. Example: Global manufacturer enabled 100+ business users to automate processes, saving thousands of IT hours annually.

	development and support	
↓ **Risk**	• Centralized governance ensures compliance and security [full audit trails] • Reduces risk of shadow IT and unauthorized integrations • Patented Runtime User Connection ensures secure, auditable actions by business users.	Workato's cited in Gartner Peer Insights for enabling *"democratized automation with strong governance."* Patented features (e.g., Runtime User Connection) ensure secure, auditable actions by business users.

Defensibility

Analyst Reports:

- **Gartner Magic Quadrant for iPaaS (2025):** Workato recognized as a Leader, with specific mention of its ability to *"scale automation across business units while maintaining centralized IT governance."*
  Gartner approved customer-facing slide - Gartner MQ for iPaaS
- **Gartner MQ for BOAT (2025)**: Named Visionary in inaugural Business Orchestration and Automation Technologies report
- **Gartner Peer Insights:** Customers highlight Workato's federated approach as key to *"democratizing automation without losing control."*

Work Automation Index 2024:

- 50%+ of Workato customers use the platform in 4+ Lines of Business; 37% in 5+
- 44% of Workato builders are business experts; 56% are IT experts
- Demonstrates successful federated adoption at scale (Full Report)

Customer Testimonials:

- **Gonzaga University:** *"Our average build for any integration was at least 10 days. We started bringing in Workato and we started to see five days easy."* Lyle Spencer, Data Architech (Case Study + Film)
- *"Workato allowed us to empower our business teams to automate safely, reducing IT workload and accelerating innovation."* (Source: Gartner Peer Insights)
- **Cobalt** (Embed customer): *"We found that Workato was by far the best from a security standpoint. It's the total package of infrastructure, observability, traceability, and multi-tenancy."* - Eugene Revzin, Senior Staff Product Manager, Cobalt
- **Village Roadshow** (Entertainment, ANZ): *"Crucially, our legacy iPaaS platform required us to change our operating model to be more centralised but Workato was adaptable and strongly aligned to our new integration strategy – a decentralised model with central governance."* - Krishna Soni, Head of Architecture
- **Navitas** (Education, ANZ) - *"We've moved from a centralized IT model to an agile, distributed system. This has not only improved our operational efficiency but has also significantly enhanced our ability to serve students and partners globally."* — Warwick Calkin, CIO (blog)
  - **Problem:** Corporate IT team overwhelmed with integration requests from departments and partner institutions. **2-year backlog** hindering ability to respond to market changes. IT bottlenecked building custom integrations on JBoss and IBM App Connect. No real-time data sharing between systems. Shadow IT emerging across the organization
  - **Solution:** Shifted from centralized IT to **decentralized agile operation** with robust governance. Leveraged Workato's workspace model and recipe lifecycle controls for self-service with safe scaling.
  - **Outcomes:**
    - **10x faster integration delivery**
    - **6-18x increase in integration velocity** - integrations stalled for 6-7 months now fixed and deployed in 1 week

- **6 integrations rolled out in 2 months** (vs. taking an entire year previously)
- Eliminated central IT bottleneck
- In-house developers elevated to offer professional services across the organization
- Goal: completely eliminating shadow IT

Patents: Workato holds patents enabling federated, secure automation:

- Runtime User Connection (US10872000B2): Enables secure, auditable user actions at runtime
- Additional patents: US11368415B2

Trap-Setting Questions

1. **Select Trap** - Introduce the concept of the value delivered by the differentiator:
   - *How do different business units or departments in your organization currently handle their integration, automation, and workflow orchestration needs?*
   - *What challenges have you experienced when trying to balance business agility with IT governance and security?*
   - *How often do you encounter bottlenecks or delays because projects have to go through a centralized IT team?*

2. **Open Trap** - Tee up and quantify the value for the customer:
   - *What impact do these bottlenecks or delays have on your ability to respond to new business opportunities or changing market conditions?*
   - *How does the current approach affect IT workload, and what are the consequences for business teams waiting on IT to deliver automations?*
   - *What risks have you seen arise from business teams creating their own "shadow IT" solutions when they can't get timely support from central IT?*

3. **Close Trap** - Define the customer Solution Requirement (in customer language) aligned with the differentiator:
   - *What would it mean for your organization if business units could safely build and manage their own automations, while IT still maintained oversight and control?*
   - *How important is it for you to have a model where both speed and compliance are achieved, enabling business teams to innovate without compromising security or governance?*
   - *If you could empower business users to automate processes independently, but with IT-defined guardrails, how would that change your organization's ability to scale projects and reduce risk?*

→ Ask the WSS Coaching Wizard to craft **specific Trap-Setting questions for your deal**

Operational Cost Architecture (OrCA)

Comparative	Best against:
	• **MuleSoft** - Requires significant IT resources, complex infrastructure, and higher ongoing costs. Demands significant capital investment in servers, storage, load balancers, and HA configuration. • **Boomi** - Less comprehensive automation, more manual maintenance, and scaling challenges. Requires hybrid/on-premise infrastructure setup and dedicated maintenance teams along with costs for Managed Cost Services (MCS.) • **Microsoft Power Automate** - Limited enterprise governance, fragmented experience, and hidden operational costs. • **SAP CI:** SAP-centric platform optimized for SAP ecosystem but limited outside it. Requires expensive SAP BTP expertise and specialized consultants. Non-SAP integrations demand additional custom development and proprietary Groovy scripting. • **TIBCO:** Legacy ESB requiring substantial infrastructure and specialized developers. High maintenance overhead and limited cloud-native capabilities. • **Informatica** - Higher complexity, slower time-to-value, and more expensive to operate at scale. Legacy infrastructure dependencies with high operational overhead • **Jitterbit**, **Tray.io** - Less mature governance, fewer enterprise features, and higher total cost for large-scale deployments. • **n8n:** Open-source requiring self-hosted infrastructure and DevOps overhead. No enterprise MCP, governed AI agents, or managed services. DIY total costs typically exceed managed solutions at scale. • **SnapLogic** - Hybrid model requiring infrastructure provisioning and management. • **In-house development** - Extensive infrastructure setup and specialized teams needed

Description

Operational Cost Architecture (OrCA) is Workato's approach to delivering automation and integration with the lowest total cost of ownership. OrCA encompasses all resources, time, and risks involved in deploying, managing, and scaling automation across the enterprise, not just licensing costs.

Workato's OrCA advantage:

- **Unified Platform:** Integration, automation, and orchestration in a single platform for IT and business users
- **Cloud-Native, Auto-Scaling:** No infrastructure to manage, with automatic scaling and zero DevOps overhead
- **Pre-built Assets:** 1,200+ connectors and intuitive custom integration tooling connecting to 14,000+ unique applications, 900K+ community recipes, and 100+ Enterprise MCP servers for rapid deployment
- **Enterprise Governance:** Centralized management, security, and compliance controls
- **Democratized Automation:** More users can build, reducing reliance on scarce technical resources

Why it matters: Competitors often require multiple tools, heavy IT involvement, or complex infrastructure. Workato's OrCA model minimizes hidden costs, accelerates time-to-value, and reduces operational risk.

Zero Infrastructure Cost - Workato's fully serverless, cloud-native architecture eliminates all upfront infrastructure costs and ongoing maintenance expenses. Unlike traditional platforms that require significant capital investment in servers, storage, load balancers, HA configuration, and dedicated infrastructure teams, Workato operates without any infrastructure footprint. Organizations can immediately start building integrations without provisioning hardware, configuring networks, or hiring specialized infrastructure personnel.

- **Zero** capital expenditure on hardware or infrastructure
- **No ongoing maintenance** costs for servers, storage, or networking equipment
- Elimination of dedicated infrastructure teams and associated labor costs
- **Automatic scaling** without pre-provisioning or capacity planning
- **Built-in high availability** without additional infrastructure investment
- **MCP server infrastructure:** Fully managed, production-grade MCP servers eliminating months of Kubernetes setup, container orchestration, and ongoing operational overhead
- **AI model serving infrastructure:** Direct connectivity to LLM providers without building and maintaining API gateways, rate limiters, or caching layers

Why it matters: Traditional iPaaS and integration platforms create significant operational drag through infrastructure requirements. AI agent deployment compounds this with additional infrastructure for MCP servers, model serving, vector databases, and orchestration layers. Enterprises building DIY AI infrastructure (e.g., n8n, LangChain, custom MCP) typically underestimate total costs by 3-5X. Eliminating both integration and AI infrastructure burden entirely, allows organizations to redirect capital and human resources from infrastructure management to strategic business initiatives and innovation.

Non-Functional Requirements Elimination - Workato eliminates licensing costs for external development tools like Jenkins, Maven, Git, and other development lifecycle tools, plus AI-specific tooling like LangSmith, LangFuse, vector database managers, and custom MCP development frameworks, reducing toolchain complexity by 80%. Unlike platforms without exhaustive enterprise-grade capabilities that require expensive toolchain integration and maintenance, for both integration and AI workloads.Workato provides a unified development experience with built-in CI/CD, version control, testing, monitoring, and deployment capabilities, and AI governance capabilities.

- Built-in version control and collaboration features
- Comprehensive monitoring and observability without additional dashboards
- Built-in deployment automation and rollback capabilities
- Built in Error monitoring within recipe ops
- Built-in KPIs, human-in-the-loop controls, AI testing frameworks without external tools
- Create and manage MCP servers without separate development toolchain or testing infrastructure
- Track AI agent performance, token usage, model calls without external monitoring tools

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Zero Development Environment Setup - Workato reduces project start time from weeks to minutes by eliminating IDE setup and configuration overhead. Unlike platforms that require complex IDE setup, Java dependencies, and integration with multiple external tools, Workato enables developers to start building integrations from day one through its browser-based, fully-configured development environment.

- Instant browser-based development environment access
- Zero software installation with minimal configuration requirements
- Built-in version control and collaboration features
- Immediate access to all platform features and connectors
- Built-in collaboration tools for team development
- Automatic environment synchronization across team members
- Build AI agents in same environment: Create AI-powered workflows alongside integrations without separate AI development tools
- Pre-configured LLM access: Major AI providers ready to use without API configuration or credential setup

Why it matters: Other iPaaS platforms create significant barriers to productivity through complex environment setup

requirements. New team members can spend weeks getting their development environment configured before they can contribute, while project starts are delayed by infrastructure provisioning and tool configuration.

Customer Value

Customer Value	How the Operational Cost Architecture (OrCA)	Proof Points
↑ **Revenue Impact**	• Fast rollout, time-to-market and time-to-value for revenue-generating initiatives. • Accelerate project delivery by eliminating infrastructure setup, IDE configuration, toolchain complexity, and enabling to build new use cases faster • Enables faster time-to-market (TTM) for revenue generating integrations • Free IT team bandwidth and budget for strategic, revenue-generating initiatives vs. infrastructure management • Accelerates development velocity by eliminating tool integration overhead • Lower operational costs make previously uneconomical integrations financially viable • Enable revenue-generating use cases that couldn't justify business case with traditional platform costs • Enables faster delivery of revenue-generating integrations • Reduces time-to-market through streamlined development processes • Deploy production AI agents in days vs. months, thanks to no MCP infrastructure build time • Launch AI-powered customer experiences without infrastructure delays • Accelerates project delivery by eliminating setup delays (weeks to minutes) • Allows rapid response to urgent business integration requirements	**Atlassian:** 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. (Case Study) OrCA Case Studies OrCA in Action Wins Deck
↓ **Cost**	• 28.6% cost reduction per automated process • No infrastructure or DevOps costs • Reduce operational overhead by removing need for dedicated infrastructure teams • 3-5x faster development through pre-built connectors and intuitive approach • Adds flexibility to infrastructure spend through the usage based pricing aspect of Workato platform • Eliminates licensing costs for separate development tools per developer • Reduces maintenance overhead through unified platform approach • Eliminates need for specialized toolchain integration and maintenance teams	**Gulf Marine:** Saving 530 hours each month, or over US$200,000 per year(Case Study + film) **Fullerton Health:** 66% reduction in operating costs, with the work of 5 specialized integration developers being done by half a DevOps team member, who only needs to define guardrails and templates on how Workato should be used.

	• Eliminates setup time costs for new developers and projects • Reduces IT support overhead for environment configuration and troubleshooting • Removes software licensing costs for development tools and IDEs	OrCA Case Studies OrCA in Action Wins Deck
↓ **Risk**	• Removes infrastructure failure points and single points of failure • Eliminates security vulnerabilities from self managed infrastructure • Reduces compliance burden / overload through managed cloud infra • Removes integration points between multiple development tools • Eliminates version compatibility issues across toolchain components • Built-in enterprise AI governance eliminates custom security implementation risks • Unified audit trails for AI and integration compliance requirements • Provides unified security and compliance across entire development lifecycle • Eliminates environment configuration errors that delay projects • Removes dependency on local machine configurations and compatibility issues • Provides consistent development experience across all team members	OrCA in Action Wins Deck

Defensibility

Analyst Reports:

- **Gartner Magic Quadrant for iPaaS (2025):** Workato is recognized as a Leader for the sixth consecutive year, with the furthest in vision for iPaaS. Gartner highlights Workato's ability to deliver rapid, cost-effective automation at scale
  Gartner approved customer-facing slide - Gartner MQ for iPaaS
- **Gartner Peer Insights:**
  - Customers highlight Workato's federated approach as key to *"democratizing automation without losing control."*
  - Only Customers' Choice for iPaaS, 5/5 deployment, zero infra mgmt

Customer Testimonials (OrCA in Action Wins Deck)**:**

- **VGCCC** (Government, ANZ): *"Workato exceeded expectations. We've delivered great outcomes ahead of timelines and at a much lower cost, especially to implement and maintain. It's about getting the most out of our resources, stopping the mundane tasks, and getting people to work on higher-value activities. Workato has allowed us to upskill our team and focus on more meaningful work."* - Ian Mcleod, CIO
- T-Mobile: € 5.48 Mn 3-Yr cumulative business value with Workato compared to Mulesoft
- Logitech: 88% faster go-live, in 9 weeks from 24 weeks
- Atlassian: 40% faster ERP migration, no infra setup, rapid scaling
- Broadcom: 6,500 hours/month saved, no infra team growth, instant scaling
- Orange, Australia (Gov): Platform stood up in minutes, no infra setup, instant value
- MuleSoft Replacement Stories: 66.7% reduction in infra support, rapid scale, lower TCO
- ThredUp: 53% lower TCO and 5-6X faster speed of development since switching from Boomi to Workato
- Backstop Solutions (Embed customer): 750% ROI in one year

- TalentReef (Embed customer): 900% ROI in 6 months
- **Gulf Marine** (Maritime, ANZ) - *"More than 2,100 hours per month saved, translating to nearly $800,000 per year."* — Joey Chua, Former Director of Digital & IT Transformation
- **ICON** (Construction, ANZ) - 30x more optimised team size: By automating with Workato, ICON only requires 2 Digital Engineers to deliver on the kind of work being done by 60 digital engineers in other construction firms.

Whitepaper: Document Less, Deliver More

Trap-Setting Questions

1. **Select Trap** - Introduce the concept of the value delivered by the differentiator:
   - *How much time and effort does your team currently spend for deployment, maintenance, and support?*
   - *What resources are required to manage infrastructure, upgrades, and troubleshooting for your existing tools?*
   - *How often do you encounter unexpected costs — such as consulting, custom development, or downtime — when scaling or updating your automations?*
2. **Open Trap** - Tee up and quantify the value for the customer:
   - *What is the business impact when IT or business teams are pulled away from strategic projects to handle integration issues or manual workarounds?*
   - *How do these ongoing operational costs affect your ability to deliver new strategic initiatives or respond quickly to business needs?*
   - *If you could reduce the time and resources spent on maintenance and support by half, what would that enable your team or organization to achieve?*
3. **Close Trap** - Define the customer Solution Requirement (in customer language) aligned with the differentiator:
   - *What would an ideal solution look like if you could minimize both the visible and hidden costs across licensing, infrastructure, and ongoing operations?*
   - *How important is it for you to have a platform that allows both IT and business users to build and scale projects without increasing operational overhead?*
   - *What requirements would you set for a future platform to ensure predictable, low total cost of operations as your needs grow?*

Zero Infrastructure Cost

1. **Select Trap** - Introduce the concept of the value delivered by the differentiator:
   - *How much time and budget does your team currently spend on setting up, maintaining, or upgrading integration infrastructure?*
   - *What challenges have you faced with provisioning or scaling integration infrastructure for new projects?*
   - *How often do infrastructure requirements slow down your ability to deliver new integrations or automations?*
2. **Open Trap** - Tee up and quantify the value for the customer:
   - *What are the downstream effects on your business when projects are delayed due to infrastructure bottlenecks or resource constraints?*
   - *How do ongoing infrastructure costs like hardware, maintenance, or specialized personnel impact your IT budget and ability to fund strategic initiatives?*
   - *What risks or compliance concerns arise from managing your own integration infrastructure?*
3. **Close Trap** - Define the customer Solution Requirement (in customer language) aligned with the differentiator:
   - *If you could launch integrations without any infrastructure setup or maintenance, how would that change your*

team's priorities or project timelines?
- *What would it mean for your business if you could scale integrations instantly, without worrying about infrastructure or capacity planning?*
- *How important would it be for you to have an integration platform that eliminates infrastructure costs and lets your team focus entirely on delivering business value?*

Non-Functional Requirements Elimination

1. **Select Trap** - Introduce the concept of the value delivered by the differentiator:
   - *What resources are required to keep your integration platforms and supporting tools running smoothly?*
   - *How many separate development tools do you license and maintain for your integration development lifecycle?*
   - *What's the total cost of your CI/CD tools and development?*
   - *How much time do your teams spend integrating and synchronizing different development tools?*
2. **Open Trap** - Tee up and quantify the value for the customer:
   - *What impact do these ongoing infrastructure costs have on your ability to deliver new projects or innovations?*
   - *How do infrastructure expenses affect your IT budget and resource allocation for strategic initiatives?*
   - *Have you ever had to delay or deprioritize business initiatives due to the need to manage or upgrade integration infrastructure?*
   - *What impact does this setup time have on your ability to deliver projects quickly or respond to urgent business needs?*
3. **Close Trap** - Define the customer Solution Requirement (in customer language) aligned with the differentiator:
   - *How would your business benefit if you could eliminate infrastructure costs and reallocate those resources to higher-value projects?*
   - *What would it mean for your team if you no longer had to worry about infrastructure maintenance, upgrades, or scaling?*
   - *If you could shift your focus from infrastructure management to delivering business outcomes, how would that change your priorities and results?*

Zero Development Environment Setup

1. **Select Trap** - Introduce the concept of the value delivered by the differentiator:
   - *How long does it take to set up a development environment for new team members?*
   - *What's your typical timeline before new developers become productive on integration projects?*
   - *Do you need to install and configure multiple tools before developers can start building?*
   - *How much time do your teams typically spend setting up development environments before they can start building integrations or automations?*
   - *How often does your IT team get pulled in to troubleshoot environment configuration issues for new developers or integration projects?*
   - *Have you experienced delays or errors in projects due to differences in local development environments or configuration mismatches?*
   - *When onboarding new developers or team members, how long does it typically take before they can contribute to integration projects?*
2. **Open Trap** - Tee up and quantify the value for the customer:
   - *What's the cost impact of having developers unproductive during environment setup?*
   - *How do setup delays affect your project timelines and delivery commitments?*

- *What IT support effort goes into managing development environment configurations?*
- *What are the hidden costs such as lost productivity or IT support hours associated with managing and maintaining local development environments?*
- *How do these inconsistencies affect project timelines, quality, or team collaboration?*
- *What challenges do you face when trying to scale your development teams or onboard contractors quickly?*

3. **Close Trap** - Define the customer Solution Requirement (in customer language) aligned with the differentiator:
   - *How valuable would it be if new team members could start contributing immediately?*
   - *How important is having a consistent development experience that doesn't depend on local configurations?*
   - *How would your business benefit if new team members could start building integrations immediately, without any environment setup or software installation?*
   - *What would it mean for your IT team and project budgets if environment setup and troubleshooting were eliminated entirely?*
   - *How important would it be for your teams to have a consistent, always up-to-date development environment accessible from anywhere?*
   - *How would your onboarding process change if new team members could start building on day one, with no setup required?*

→ Ref. additional comprehensive list of Enterprise **MCP-specific Trap-Setting Questions** against Boomi/MuleSoft/n8n/Zapier
→ Ask the WSS Coaching Wizard to craft **specific Trap-Setting questions for your deal**

Enterprise Grade Security & Compliance

Comparative	Best against:
	• **MuleSoft** - Complex to manage, fewer certifications, slower auditability. • **Boomi** - Lacks modern zero-trust architecture and advanced audit features. • **Jitterbit** - Missing key certifications and runtime user authentication. • **Microsoft Power Automate** - Limited audit controls, tied to Microsoft ecosystem, less compliance breadth. • **Zapier** - No enterprise certifications, lacks audit, encryption, and compliance controls. • **Tray.io** - No real-time audit logs, weak encryption/key management, not enterprise-validated. • **Celigo** - Not widely adopted for regulated use cases; limited certifications and auditability. • **SnapLogic** - Lacks depth in compliance certifications and granular audit controls. • **n8n.io** - No enterprise-grade certifications or advanced compliance features; SMB-focused.

Description

Enterprise-Grade Security and Compliance means Workato delivers automation and integration with the highest standards of data protection, privacy, and regulatory compliance. Unlike many competitors, Workato's security is deeply embedded in the platform's architecture, built to meet the needs of the most security-conscious enterprises.

Core security architecture

- **Cloud-Native Security:** Fully managed, multi-tenant service with security updates applied instantly across all customers, eliminating lag between vulnerability disclosure and fix
- **Zero-Trust Architecture:** Least-privilege access by default, with SSO, MFA, and granular RBAC ensuring users and systems only access what they need
- **Encryption & Key Management:** All data encrypted in transit and at rest (AES-256), double-encrypted job history, workspace-level key hierarchy, hourly key rotation, and BYOK/EKM options
- **Identity & Access:** Enterprise SSO (SAML), SCIM provisioning, IP allowlists, OAuth2/JWT authentication, and unified RBAC across all capabilities (APIM, workflow, AI, data, bots)
- **Data Controls:** Granular retention policies (down to recipe level), zero-retention options for sensitive jobs, and native integrations with enterprise vaults (AWS Secrets Manager, Azure Key Vault, HashiCorp Vault, CyberArk Conjur)
- **Data Residency:** Regional data centers ensure data stays within required geographic boundaries; EU data sovereignty with core AI features fully hosted within EU; Virtual Private Workato (VPW) for isolated deployments
- **Auditability:** Complete audit trails, SIEM export via API, and real-time monitoring of all actions

Certifications: SOC 1/2 Type II, ISO 27001, ISO 27701, PCI-DSS Level 1, HIPAA, IRAP, GDPR, CCPA

AI Governance: According to the 2024 State of LLMs study, 90%+ of enterprises say governance is critical for generative AI. Workato's Agent Trust and Enterprise MCP governance capabilities directly address these requirements by providing:

- Policy-based controls ensuring AI agents operate within defined boundaries
- Enterprise-grade authentication and authorization across all AI interactions
- Complete audit trails for AI agent actions
- Data privacy controls and encryption at every layer

Why it matters: Enterprises can automate at scale without compromising compliance or data protection, enabling secure deployment in regulated industries (finance, healthcare, government) where competitors cannot meet requirements.

Customer Value

Customer Value	How Enterprise Grade Security & Compliance Delivers	Proof Points
↑ **Revenue Impact**	• Enables secure automation in regulated industries (finance, healthcare, government) [unlocks new markets] • Faster go-lives with pre-built compliance controls • Competitive advantage in security-conscious enterprise deals	**Fullerton Health:** 200 man hours of time savings a month, and a substantial 37% reduction in claims processing cost. This system now also guarantees same day processing of claims, even at peak load. (Case Study)
↓ **Cost**	• Reduces compliance overhead with built-in certifications [audit-ready by default] • Eliminates cost of building and maintaining security infrastructure • Automated reporting reduces manual audit preparation	**Atlassian:** 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. (Case Study)
↓ **Risk**	• Minimizes risk of data breaches, regulatory fines, and audit failures [enterprise-grade controls] • High uptime SLA and disaster recovery • Complete audit trails and encryption at every layer	SOC 2 Type II, ISO 27001, and GDPR compliance (Workato Docs) 99.9% uptime SLA and disaster recovery tested quarterly (Printemps Security Evaluation)

Defensibility

Analyst Reports:

- **Gartner Magic Quadrant for iPaaS (2025):** Workato recognized as a Leader, with specific mention of its ability to *"scale automation across business units while maintaining centralized IT governance."*
  Market Leadership - Workato was recognized as a Leader for the seventh consecutive iPaaS MQ, and recognized as being furthest in vision. Gartner cites Workato's strengths in product versatility, security, and breadth of functional capabilities. Our prebuilt context, intuitive experience, and leadership in AI are also highlighted.
  One-platform for integration/automation/orchestration & company-wide authoring approach - Workato acknowledged as one of the first vendors to meet growing customer demand for combining integration/automation/orchestration, providing support for a company-wide authoring model to iPaaS through flexible governance and an intuitive build experience.
  Gartner approved customer-facing slide - Gartner MQ for iPaaS

Customer Testimonials & Case Studies:

- **Atlassian:** *"When our auditors reviewed our documentation, they were really amazed. They were like all the controls*

were met, and the systems are really accurate and reliable." (External Video)

- **Jollibee Foods** (Retail, Asia): Achieved 100% adherence to controls and 88% increase in processing efficiency by automating SAP approvals with Workato, meeting strict compliance requirements (Case Study)
- Theo Chu, Product Manager at **Anthropic**: *"We're excited to see the MCP transforming Workato's approach to enterprise workflow automation. With Workato's Enterprise MCP offering, Claude brings more intelligent, context-aware automation to the enterprise."*
- **Cobalt** (Embed customer)**:** *"We found that Workato was by far the best from a security standpoint. It's the total package of infrastructure, observability, traceability, and multi-tenancy."* - Eugene Revzin, Senior Staff Product Manager, Cobalt (Case Study)
- **Canva** (Technology, ANZ) - GEARS governance framework
- **Village Roadshow** (Entertainment, ANZ) - Zero-downtime upgrades
- **Swanson Health** - *"Everything that goes in and comes out is governed. You can audit it and remain compliant as a public company."* — Kevin Wolf, Senior Director of IT
- **SMEG UK** - *"Being able to offer AI functionality with a security layer gives us comfort."* — Cerie Payton, Head of Systems
- **TFG Transfracht** - Workato enables *"simultaneous security, governance and compliance"* - *"Workato also came with… enterprise-level security and governance"* - *"Workato offers IT teams 'stability out of the box,'* as Reinmüller puts it, *and the comfort of governance and control built-in"* — Gernot Reinmüller, Interim IT Manager [Source]

Certifications: SOC 1 & SOC 2 Type II, ISO 27001, ISO 27701, PCI-DSS Level 1, HIPAA, IRAP: All current and externally auditable (Security Documentation)

Patents: Late Connection Binding for Bots eEnables secure, auditable user actions at runtime, supporting compliance and auditability at scale (Patent US20210073051A1)

Trap-Setting Questions

1. **Select Trap** - Introduce the concept of the value delivered by the differentiator:
   - *How confident are you that your current platform and tools fully meet your organization's security and compliance requirements?*
   - *What challenges have you faced in ensuring to comply with industry regulations and internal security policies?*
   - *How much visibility do you have today into who is accessing sensitive data and how it's being used across your automated workflows?*

2. **Open Trap** - Tee up and quantify the value for the customer:
   - *What risks or consequences could arise if your platform and tools lack robust security controls or fails an audit?*
   - *How do security gaps or compliance issues in your current integrations impact your team's productivity or your company's reputation?*
   - *How much do you estimate the potential cost or operational disruption caused by insufficient compliance monitoring or delayed audit responses?*

3. **Close Trap** - Define the customer Solution Requirement (in customer language) aligned with the differentiator:
   - *How would having an integration platform with built-in, enterprise-grade security and compliance features improve your ability to meet regulatory requirements?*
   - *What difference would real-time audit logs and comprehensive security certifications make in your day-to-day operations and risk management?*
   - *How critical is it for your teams to have seamless security controls embedded in the workflows to reduce manual*

oversight and errors?

Additional Trap-Setting Questions

About Security Certifications

- *What international security and compliance requirements you need to meet to do business in your markets?*
- *How would that specifically improve if you could use a platform with HIPAA, BAA, GDPR, PCI, SOC-1, SOC-2 compliance, and data residency with regional data centers?*

About Role-Based Access Control (RBAC)

- *How are you currently enforcing role-based access controls (RBAC) for your mission-critical systems? What level of granularity is required?*
- *What would be the benefits if your integration, automation, and orchestration platform would provide customizable and granular RBAC?*

About Encryption

- *What's your encryption policy, and how are you enforcing it in your current integration, automation, and orchestration implementations?*
- *How would your security/risk posture improve with Enterprise Key Management (EKM)? With Bring Your Own Key (BYOK)? With Encryption Key Rotation (EKR)? With end-to-end credentials/secrets management? With System for Cross-domain Identity Management (SCIM)?*

About Availability

- *Tell me about a time when you experienced an unplanned downtime of your mission critical systems/data/apps? What were the negative effects?*
- *How would the uptime of your integration, automation, and orchestration platform affect the risk of this happening (again)?*
- *So, what would be the minimum 'uptime' and maximum 'deployment downtime' requirements for such a platform?*

→ Ref. additional comprehensive list of Enterprise **MCP-specific Trap-Setting Questions** against Boomi/MuleSoft/n8n/Zapier
→ Ask the WSS Coaching Wizard to craft **specific Trap-Setting questions for your deal**

The CIO Value Driver Spine

1. Enterprise Agility
2. Efficiency & Operational Cost Architecture (OrCA)
3. Risk Reduction
4. Revenue Growth

Each Value Driver answers a distinct CIO question and maps to specific differentiators.

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1. Enterprise Agility

CIO Question

Can IT move at the speed the business needs without becoming the bottleneck or the risk owner?

Current State (CIO Reality)

Senior IT leaders face constant pressure to deliver change faster while managing increasing complexity:

- Legacy integration and automation platforms consume time and budget just to stay operational
- SaaS, cloud, and AI tools are adopted faster than IT can integrate or govern
- Delivery backlogs grow faster than capacity
- AI pilots stall due to missing connectivity, governance, or scale
- Limited visibility into how processes, data, and automations behave end to end

Core tension: IT is accountable for outcomes, security, and reliability, but lacks the operating model to move at business speed.

Negative Effects

- Slower innovation despite increased spend
- IT perceived as a blocker instead of a strategic enabler
- AI experimentation without measurable production impact
- Rising integration and operational costs with declining ROI
- Increased shadow IT and fragmentation
- Missed business opportunities due to slow response

Desired State

CIOs want an environment where:

- Technology transformation happens in weeks, not years
- Integration, automation, and AI are orchestrated across the enterprise
- Business teams innovate independently within IT-defined guardrails

- AI moves from experimentation to production reliably
- IT regains credibility as a strategic partner

Business Outcomes

- Faster time to market for digital initiatives
- Higher percentage of projects delivered on time
- Increased IT and business productivity
- Measurable ROI from AI initiatives
- Improved customer and partner experiences

Discovery (Enterprise Agility)

1. When the business asks IT to connect systems or automate something, what usually happens next?
2. How long does it typically take from request to something live?
3. How do you decide which requests move forward versus sit in the backlog?
4. How would the business describe IT's ability to move at the speed they need today?
5. How much time is spent keeping existing integrations running versus building something new?
6. If you wanted to put an AI agent into production today, what would need to be in place?
7. Where have AI pilots stalled so far?
8. Where do teams go when they need something done faster than IT can deliver?
9. What's the cost of moving at today's speed?
10. If nothing changed in the next 12–18 months, what would concern you most?

Differentiator Lens

Primary: SPEED

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2. Efficiency & Operational Cost Architecture (OrCA)

CIO Question

Can we scale delivery and AI adoption without scaling cost, headcount, or complexity?

Current State

As demand for automation and integration grows:

- IT spends more time running than changing
- Cost per integration and automation remains high
- RPA and point automation create maintenance drag
- Tool sprawl inflates operating cost
- AI initiatives threaten to increase cost instead of reducing it

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Negative Effects

- Growing project backlogs
- Rising operational spend
- Low return on automation investments
- Burnout of high-value technical staff
- Inability to absorb demand spikes

Desired State

CIOs want an operating model where:

- Cost per change declines as scale increases
- More builders contribute without linear IT cost growth
- Automation delivers durable ROI
- AI efficiency gains do not require new infrastructure or teams

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Business Outcomes

- Faster delivery with stable or reduced cost
- Higher IT productivity
- Reduced shadow IT spend
- Predictable scaling economics

Discovery (Efficiency & OrCA)

1. How much effort goes into running systems versus delivering new capabilities?
2. Where does delivery get expensive or unpredictable?
3. When demand spikes, what breaks first: timelines, quality, or cost?
4. Which processes still rely heavily on manual work or coordination?
5. How do you measure ROI on automation today?
6. Which automation investments have been hardest to scale or maintain?
7. If delivery demand doubled, could you absorb it without doubling cost or headcount?

Differentiator Lens

Primary: SCALE

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3. Risk Reduction

CIO Question

How do we increase speed, autonomy, and AI adoption without increasing enterprise risk?

Current State

As automation and self-service expand:

- Visibility into data movement and automated actions decreases
- Governance slows delivery or gets bypassed
- Shadow IT proliferates
- AI agents introduce new risk vectors
- Audit and compliance effort increases

Negative Effects

- Increased security and compliance exposure
- Slower response to incidents
- Higher audit and remediation costs
- Erosion of executive and customer trust

Desired State

CIOs want:

- Governance that scales with autonomy
- Full visibility and auditability across automation and AI
- AI agents operating within defined, enforced boundaries
- Faster incident detection and response

Business Outcomes

- Reduced risk exposure
- Faster audits and compliance responses
- Lower security and compliance cost
- Sustained trust at scale

Discovery (Risk Reduction)

1. How confident are you in your visibility across automated actions today?
2. Where do governance controls slow delivery the most?
3. Where have teams worked around those controls?
4. Which automated processes would create real impact if they failed?
5. How do you ensure AI agents operate within approved permissions?
6. How quickly can you detect and trace issues in automated workflows?
7. What would concern you if auditors or the board asked for proof of control?

Differentiator Lens

Primary: POWER

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4. Revenue Growth

CIO Question

Does improving agility, efficiency, and control actually translate into growth and competitiveness?

Current State

Revenue is impacted by:

- Fragmented systems creating inconsistent experiences
- Slow launch of new digital capabilities
- Manual handoffs slowing deals and renewals
- AI insights that do not translate into action

Negative Effects

- Customer churn and dissatisfaction
- Missed upsell and cross-sell opportunities
- Delayed revenue initiatives
- Competitive disadvantage

Desired State

CIOs want:

- Consistent customer and partner experiences
- Faster launch of revenue-generating initiatives
- AI-enabled execution across systems
- Technology clearly tied to growth metrics

Business Outcomes

- Higher retention and NRR
- Faster time to revenue
- Increased conversion and expansion
- Improved customer satisfaction

Discovery (Revenue Growth)

1. Where do disconnected systems hurt customer or partner experience most?
2. Which revenue-impacting processes are hardest to change?
3. How long does it take to launch a new digital capability?
4. Where have revenue opportunities been delayed by system constraints?
5. Where do AI initiatives fail to reach execution?
6. How much time do revenue teams spend coordinating across systems?
7. How do you tie technology improvements to revenue metrics today?

Differentiator Lens

Primary: SPEED + POWER

Differentiator Mapping

Value Driver	Differentiator	Purpose
Enterprise Agility	SPEED	Accelerate change safely
Efficiency & OrCA	SCALE	Enable economic growth
Risk Reduction	POWER	Govern at scale
Revenue Growth	SPEED + POWER	Execute growth reliably

Seller Usage Rules

- Never lead with differentiators
- Introduce differentiators only after the buyer articulates the problem
- Use one differentiator at a time
- Product discussion begins only after buyer curiosity is earned

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Proof Points, Case Studies, and Evidence Library

This section provides the **evidence layer** for the Value Driver and Differentiator framework. It is designed for AI retrieval, seller coaching, and credibility reinforcement **after** value has been established.

The intent is not to overwhelm sellers in live conversations, but to ensure the knowledge base contains **substantiated examples** that can be surfaced contextually when needed.

Proof Points by Value Driver

Enterprise Agility – Proof Points

Analyst Validation

- Gartner Magic Quadrant for iPaaS (multiple consecutive years): Workato recognized as a Leader and cited as the only vendor consistently positioned around orchestration rather than point integration.
- Gartner commentary highlights Workato's ability to unify integration, automation, and emerging agentic AI use cases on a single platform.

Customer Evidence (Enterprise)

- **Atlassian**: Accelerated ERP transformation timelines by approximately 40 percent compared to legacy iPaaS approaches, enabling faster fiscal close and reduced operational disruption.
- **Gonzaga University**: Enabled significantly more automation builders across IT and business teams, reducing average integration delivery time and improving error detection without increasing IT headcount.
- **Unity**: Consolidated fragmented application landscape and eliminated hundreds of applications, enabling faster response to business change while reducing complexity.

Customer Evidence (AI Readiness)

- **Samsara**: Doubled IT service delivery and automation throughput in weeks rather than months, while supporting massive data volumes and global scale.
- **Persefoni**: Deployed AI-enabled customer support capabilities within days, scaling productivity without additional hiring.

What These Prove

- Enterprise agility improves when infrastructure, tooling, and governance are removed as constraints.
- Speed to value is achievable without sacrificing reliability or control.

Efficiency & OrCA – Proof Points

Analyst and Economic Studies

- Independent Total Economic Impact studies consistently show materially lower total cost of ownership compared to legacy middleware and multi-tool automation stacks.
- Analyst research highlights reduced operational overhead due to elimination of infrastructure management and toolchain complexity.

Customer Evidence (Cost and Scale)

- **Unity**: Achieved approximately 19 million dollars in total cost savings through platform consolidation and reduced operational overhead.
- **Broadcom**: Saved thousands of hours per month by automating IT workflows without expanding the IT organization, even as the workforce grew significantly.
- **ThredUp**: Reported materially lower total cost of ownership and significantly faster development cycles after replacing legacy integration tooling.

Embedded and ISV Evidence

- **Epicor**: Reduced integration delivery timelines from months to weeks, enabling faster customer onboarding and increased deal velocity.
- **Mitratech**: Scaled from a handful of integrated customers to hundreds in a short period without linear growth in engineering cost.

What These Prove

- Efficiency gains are not about cutting budgets; they are about lowering the cost per change.
- Economic scalability enables sustained agility rather than one-time acceleration.

Risk Reduction – Proof Points

Analyst and Compliance Validation

- Workato maintains broad enterprise-grade security certifications (SOC 1, SOC 2, ISO 27001, ISO 27701, HIPAA, PCI), enabling deployment in regulated industries.
- Analysts consistently cite Workato's governance model as a differentiator for scaling automation safely.

Customer Evidence (Governance at Scale)

- **Atlassian**: Auditors highlighted the quality and completeness of controls and documentation produced through automated, orchestrated workflows.
- **Evernote**: Reduced offboarding time dramatically while improving security posture by eliminating manual, error-prone steps.
- **Gonzaga University**: Identified security and data issues that were previously invisible due to fragmented systems.

AI Governance Evidence

- **TrustArc (Embedded)**: Leveraged governed AI connectivity to ensure AI agents operated within strict enterprise security and data boundaries.
- **S-Docs**: Enabled secure AI agent access to enterprise systems without exposing sensitive data or creating unmanaged service accounts.

What These Prove

- Risk increases when automation and AI scale without orchestration.
- Governance must be native, not bolted on, to scale safely.

Revenue Growth – Proof Points

Customer Evidence (Experience and Growth)

- **Logitech**: Modernized ecommerce and support experiences in weeks, saving millions in migration cost while improving customer satisfaction and self-service adoption.
- **Lucid Motors**: Reduced end-to-end process times dramatically, enabling faster delivery and improved customer and employee experiences across regions.
- **NSW Rural Assistance Authority**: Accelerated delivery of financial assistance at scale by orchestrating data and processes across systems, directly impacting economic outcomes.

Embedded Revenue Evidence

- **Spiff**: Generated millions in new pipeline and ARR by offering scalable integrations to customers.
- **TalentReef**: Achieved rapid revenue growth and exceptional ROI by reducing time-to-value for customers through embedded orchestration.
- **Backstop Solutions**: Increased net revenue retention and achieved significant ROI by launching integration capabilities as a differentiated product offering.

What These Prove

- Revenue growth is constrained by execution, not insight.
- Orchestrated systems enable faster launches, higher retention, and differentiated experiences.

Proof Points by Differentiator

SPEED – Evidence

- Zero-downtime upgrades with hundreds of platform updates annually ensure continuous innovation without operational disruption.
- Customers consistently report faster build and deployment cycles compared to legacy integration platforms.

Examples:

- Atlassian ERP migration completed months faster than planned with legacy tooling.
- Multiple customers report integrations going live in days rather than months.

SCALE – Evidence

- Cloud-native, serverless architecture eliminates infrastructure planning and scaling bottlenecks.
- Federated delivery models enable business teams to contribute safely without increasing IT cost.

Examples:

- Broadcom scaled automation output while keeping IT headcount flat.
- Multiple ISVs scaled customer integrations to hundreds or thousands without linear cost growth.

POWER – Evidence

- Unified governance across integration, automation, and AI provides consistent auditability and control.
- Enterprise MCP enables AI agents to act securely within defined permissions.

Examples:

- Regulated customers deploy automation and AI while maintaining compliance requirements.
- Embedded customers provide AI-driven capabilities to their customers without exposing sensitive data.

How AI Systems Should Use This Evidence

- Surface proof points **only after** the corresponding Value Driver is active.
- Match examples to industry, role, and maturity level when possible.
- Prefer outcome-based evidence over feature descriptions.
- Avoid overwhelming users; provide one relevant example at a time.