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Workato

Review From A Customer



From IT Central Station, the leading review site for enterprise technology solutions.

Review by a Real User

Verified by IT Central Station



Co-founder and CEO at a tech company with 11-50 employees

Lyon Lim

WHAT IS OUR PRIMARY USE CASE?

We are using Workato for three main use cases: Quote-to-cash automation: Automatic invoice creation in an accounting system based on opportunity status updates in CRM (Salesforce). Implementing bidirectional sync to ensure CRM (Salesforce) is updated when invoices are paid. Lead cleansing: Cleansing our lead data using a third-party tool to validate contact email addresses. Business insight reports: Building multiple data feeds (real-time, scheduled, and batch) into a centralized data repository, which is used for building reports and dashboards for business insights.

HOW HAS IT HELPED MY ORGANIZATION?

I find it very empowering that our account reps now get almost instant visibility into the payment status of their accounts. The bidirectional sync from the accounting system back to Salesforce allows for much faster cash inflow. We initially had a lot of Salesforce leads and contacts that have gone stale and had no idea how to solve this problem. Workato helped us cleanse our database literally within minutes by making calls to an external third-party service. With the confidence of a clean database, we can focus on executing marketing strategies to grow the business. The improvements in our business workflows allowed us to focus on building our product and getting more customers, instead of worrying about integrations. Our developers can now focus on building our core product, instead of worrying about building and maintaining integrations.

WHAT IS MOST VALUABLE?

Ease of use: We had a very aggressive timeline to implement, therefore were looking for solutions that required minimal training to learn and use effectively. The trigger/action paradigm is fairly simple to understand. Additionally, the app connectors make it easy to get data from and post data to apps. I did not have to read any API documents or write any code. It was as simple as authorizing access to the app with my username and password. I could quickly build automations for some complex business processes by setting up a trigger event, followed by multiple steps which map to the sequence of logical actions in the business process. Even though I can write code, the recipe framework gave me the power and control I can get with code using an intuitive UI. The recipe also allowed quick iterations and testing to validate. In the end, the recipe reads like a series of simple sentences in English that describe what operations were being executed by the recipe. It was refreshing to see the combination of simplicity and power. **Speed and Agility:** We evaluated other solutions and services to fit the schedule and budget. However, the other solutions either required an architectural overhaul of our systems, which was expensive and not viable or it was building custom integrations by writing code which would have taken several months. With Workato, we could easily connect to our existing CRM and accounting apps in minutes. The ability to quickly connect to apps, build basic integrations, and validate flows was very empowering for the team. Further, as we iterated on the integrations to implement additional business rules to manage exceptions, the autoversioning in Workato ensured all our changes were tracked and allowed us to revert quickly without losing any work. **Extensibility via HTTP connector:** Although Workato has prebuilt connectors for 100s of apps, one of the third-party services we planned to use for data

cleansing was not supported. This, however, did not block us as we could connect to the third-party APIs using an HTTP connector. It is a nice little feature that makes Workato very extensible and does not confine you to using it only for integrating with apps that have prebuilt connectors. As a business, we get a lot of customer requests to integrate our platform to their applications. Workato allows us to build a connector which allows all our customers to connect to their applications easily. Workflow Automation: Besides basic integration for syncing data across multiple apps, Workato also enabled us to automate workflows that map to business processes. One of the hidden features that we discovered was the ability to automate long running processes that need to wait for human input. For example, adding a note/attachment of agreement to a Salesforce opportunity. The Workato recipe waits until the human input step (adding attachment) is completed and moves to the next step. This helped us eliminate using emails or verbal conversations to track the attachment updates, thus accelerating the process to close opportunities.

WHAT NEEDS IMPROVEMENT?

The platform is actually much more powerful than what it looks like on the surface. Lots of room for improvement to allow for discoverability of product features.

FOR HOW LONG HAVE I USED THE SOLUTION?

Less than one year.

WHAT DO I THINK ABOUT THE STABILITY OF THE SOLUTION?

No issues so far. It has been great.

WHAT DO I THINK ABOUT THE SCALABILITY OF THE SOLUTION?

Pretty good. No hiccups experienced. We actually hit our Salesforce API limits, but Workato has been okay.

HOW IS CUSTOMER SERVICE AND TECHNICAL SUPPORT?

Their customer service and technical support team is awesome. Besides showing me the basics of their recipes, they showed me the possibilities of Workato. The overall experience was very pleasant, too. I am looking forward to doing more with Workato. Being based in Singapore, it would be good to have customer support in our working hours, too.

WHICH SOLUTIONS DID WE USE PREVIOUSLY?

We were using initially using a point-to-point solution that got shut down. They worked well, but it did not allow a way for us to update the payment status in Salesforce automatically. We were left with two options: An iSaaS product To engage an external consultant. We were not comfortable with using the former because it required us to completely rework the way we use our accounting system. We were also told that they would need two months to set up.

HOW WAS THE INITIAL SETUP?

The setup is really straightforward. I got on a call with their support rep who walked me through the basics and the possibilities of Workato. I was able to set things up myself after that: connect my apps, create my steps and run the recipe.

WHAT ABOUT THE IMPLEMENTATION TEAM?

I did the implementation myself. I had a session with their support rep who walked me through the basics and possibilities of the platform, but their recipes were easy to setup.



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WHAT WAS OUR ROI?

The setup is really straightforward. I got on a call with their support rep who walked me through the basics and the possibilities of Workato. I was able to set things up myself after that: connect my apps, create my steps and run the recipe. The integration was done within a week, what we thought might take us two months to complete. We get much faster cash inflow since account reps can stay on top of their accounts in a much more efficient manner. With a cleaner database, we can now spend our time and effort doing marketing and bringing more business in. The developers can also focus on building our product and not worry about integrations. It is hard to quantify the actual ROI, but it is definitely a huge productivity boost.

WHAT'S MY EXPERIENCE WITH PRICING, SETUP COST, AND LICENSING?

Considering the level of customizability and extensibility of the platform, I think the price is very reasonable for the amount of things we can enable. They go with a flat monthly subscription fee and it does not have hidden costs, like set up, licensing, implementation, maintenance, etc.

WHICH OTHER SOLUTIONS DID I EVALUATE?

We also tried out Zapier, but were met with a lot of limitations. For example, their Salesforce update object action does not work well. They had a workaround ,but it was very cumbersome.

WHAT OTHER ADVICE DO I HAVE?

If there is something your existing solution cannot do, you should definitely check out Workato. They would probably have a very simple or quick way to get your job done.

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