The beginner's guide to General Automation Plaforms

Learn how to take advantage of API integration platforms that are designed for citizen automators

tray.io

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Introduction

Why should you read this guide?

Every business wants to grow faster and spend fewer resources to do so. If you're looking for technology trends that can deliver you an edge, this guide is for you.

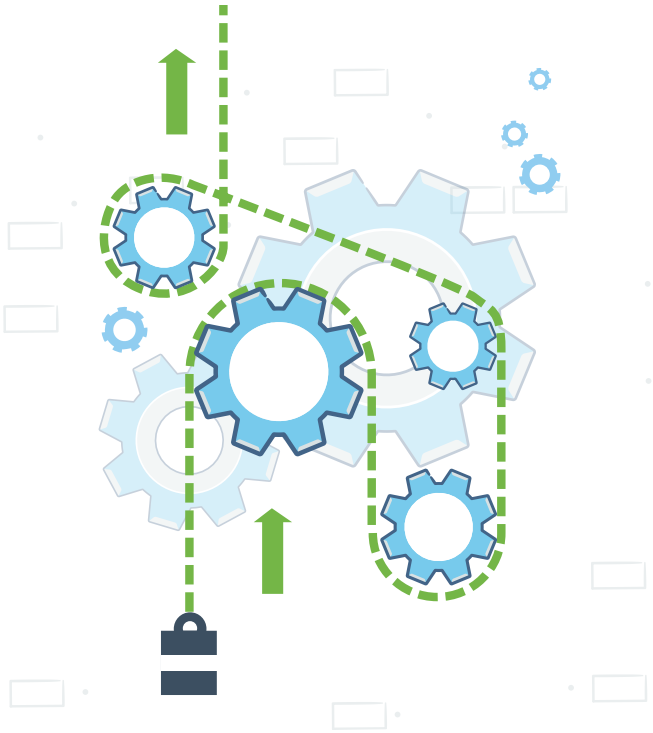
The average enterprise is using hundreds Cloud applications, but struggles to automate processes that run across them. Similarly, the average employee uses dozens of SaaS applications, yet isn't empowered to improve the processes that fall under their purview. Until recently, automation software required scarce coding skills. But with the rise of API Integration Platforms that are designed for citizen automators, a new category of software is available to workers of many types.

General Automation Platforms enable business professionals to automate processes across any number of applications and departments so that they can scale their growth and productivity.

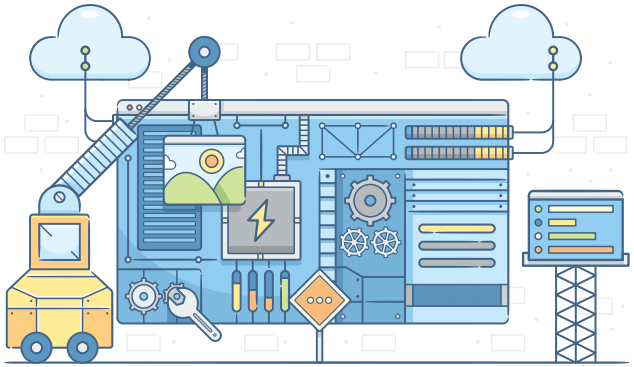
This Beginner's Guide to General Automation Platforms is designed to educate you on an emerging new technology that has the potential to transform your business. It will define the category and describe the benefits to companies that are ready to grow. We'll cover the following topics.

- Why companies are now adopting General Automation Platforms
- How General Automation Platforms differ from other software categories
- The common features and advanced functions of general automation tools
- How to build a business case and convince stakeholders to act
- The future of General Automation Platforms

We've also included worksheets that you can use to figure out whether your company is ready for General Automation Platforms and how it will help you increase growth and productivity.



Part one: What are general automation platforms?



WHAT: A General Automation Platform or GAP is a category of software which automates processes that can span multiple applications across an organization.

GAPs are referred to as “general” because of three reasons.

1. First, business people use GAPs for a wide variety of processes. They are not limited to front-office only workflows. They are not limited to IT managed operations. They are not limited to use by one industry or use by one department. They are not limited to simple point-to-point automation. They are not limited IT-driven automation initiatives. They are for general purposes.

2. Second, GAPs require general skills, rather than specialized ones. They minimize the complexity associated with building automatic, inter-application workflows. For example, users of GAPs are not required to write code. They should understand how to use a drag-and-drop interface and understand when to use logical operators which are the building blocks for workflow automation. If a user happens to know how to code, then their skills can also be harnessed in GAPs. The critical point is that coding is entirely optional and based on the preference of the user.

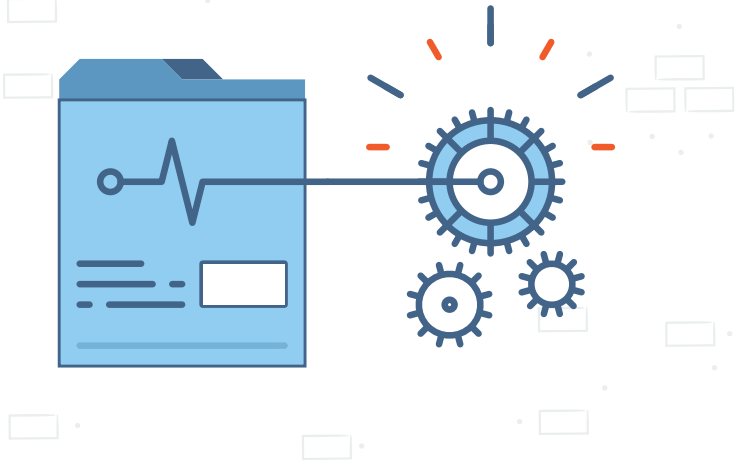
3. Third, GAPS are owned by any user, rather than owned by a particular role or department. They can be purchased, administered, and used by business people in any department, including IT and engineering.

These general platforms emphasize the word “automation” because GAPs are not focused on merely the challenges of integrating. In fact, the standardization of APIs has made the integration part of automation much more straightforward than in years past. While integration is an essential first step, a significant portion of the value of GAPs comes from automation capabilities. For example, adding math or algorithms to your GAP enables you to create new workflows like custom lead scoring. The value lies in producing the lead score, not just with the ability to integrated various marketing engagement tools like lead capture forms, website analytics, and other tools. Automation is the next frontier of innovation.

We use the word “platform” because GAPs offer a broad set of capabilities that are designed for company-wide use rather than solely for a narrow departmental function. We are not talking about a tool that has only a couple of applications.

What general automation platforms do?

General Automation Platforms streamline processes that touch multiple software applications within a department or across departments. Here is a select list of use cases by each department.



Connect your disparate marketing stack to grow faster

Here are select use cases organized by marketing role and strategy:

Demand generation

- Centralized data: Aggregate and centralize performance data from channels such as SEM, social, retargeting and others to get at a glance visibility on top-of-the-funnel programs.
- Personalized email: Take the digital signals of user behavior across your website, trial, or product as captured by customer events platforms and logically route them to your marketing automation tool or email platform for a hyper-targeted email program.
- Message orchestration: Coordinate messages across different mediums and channels like email, chat, print, and advertising.

Web marketing

- Lead capture: Capture leads from web chat tools and route them to your marketing systems so that no lead gets left behind, and marketing attribution is more accurate.
- Chat capture: Sync the text from chat conversations into marketing automation and CRM tools activity history so that all the context of the customer journey is in one place.
- Selective chat: Show a website chat window only to target accounts, so your sales or support teams do not waste time with low-value chats.
- Landing page integration: Connect best of breed landing page software to your marketing stack so that form fills flow smoothly.

Events

- Lead list ingestion: Make sure those scanned badges and lead lists from events rapidly get pushed into your systems.
- Event management: Coordinate your event teams by syncing project and task management software with CRM and marketing software.

- Swag automation: Automate the shipping of gifts to your tradeshow or prospects after events.

Marketing Ops

- API limits management: Intelligently throttle the amount of data moving across your applications so that you can stay under vendors strict API limits.
- Lead enrichment: Take data from various data enrichment vendors and integrate it into your marketing automation platform our CRM platforms.
- Lead scoring: Create custom lead scoring by integrating various systems and applying the algorithms that fit your needs.
- Lead routing: Intelligently route leads to the right resource with flexible and custom logic.
- Lead conversion: Automate processes to converted leads and contacts via your CRM's API.
- Campaign creation automation: Automatically create a new campaign when a lead with a new UTM comes in.

Product marketing

- High value features: Uncover which features your users' love by combining usage behavior and qualitative assessment and surfacing them in real-time.
- Sales enablement: Alert you sales enablement expert when a sales rep has a competitive deal that could use his expertise to win.

Customer marketing

- Survey logic: Create customized logic based on data in your CRM that determines which customers are sent a customer satisfaction survey, then trigger the survey from your provider.
- Happy customer detection: Integrate net promoter scores into CRM to surface your happiest customers to invite to participate in customer programs.
- One-click ordering of gifts: Empower sales reps to send nurture gifts by merely pressing a button in their CRM which is integrated via APIs to gift fulfillment vendors.

Account-based marketing

- Target account alerting: Alert sales reps when one of their target accounts lands on your website.
- Lead-to account matching: Match new leads to existing accounts to determine whether they belong to a particular sales rep for follow-up.
- Account-based ad targeting synchronization: Connect web visitor IP lookup services to your target account lists then trigger IP based ad targeting systems to engage further warm anonymous leads.
- Account-based email targeting: Connect IP lookup services to your target account lists then trigger outbound emails to engage warm anonymous leads further.

Good things happen when you can easily automate the flow of data through your entire marketing stack. Data enrichment and happy customer detection become automatic and continuous processes. Lead scoring is more precise, and better equipped to identify buyer intent.

Workflows as a whole become more agile, easier to scale, and increasingly capable of generating substantial leads that move deeper into the sales funnel.

Automate your sales applications to drive more sales with less effort

Below are a few examples of processes that are enhanced when data flows are optimized for action:

- Sales data is gathered and enriched in a single point of truth more effectively.
- Save email engagement data into your CRM so that your sales rep knows whether a sales lead has clicked on marketing or sales emails.
- Custom lead scoring. Hot leads addressed instantly
- Alerting with all lead record info and a click to call hyperlink so reps can flow up fast.
- CRM alerts are triggered based on the most

recent marketing automation platform and content management platform data.

- Leads are automatically routed to the correct people.
- CRM merging and migration. Create bi-directional sync between dozens of legacy CRMs and a singular CRM instance.
- Add conditional logic to the end of a customer data platform stream to create custom activities and records in CRM based on events being created in connected systems.
- Surface hot leads from webchat to your sales team.
- MAP to CRM bi-directional sync: Keep your marketing automation platform entirely in-sync with your CRM.
- Improve your request for proposal (RFP) process by connecting your CRM to Slack to give visibility to RFP contributors. Follow-up efficiency as a whole improves with automated communication processes. Consequently, RFP win rates increase.
- Manage your sales approval process via slack

The overall result of these and other sales process streamliners is the ability to drive prospects deeper into the sales funnel faster and to strategically and precisely time the delivery of hard sells and upsells.

Less time looking for info more time to deliver customer success

Achieving stellar customer satisfaction scores is no small feat. But it can get significantly easier when your systems offer you a full view of customer health and also deliver a frictionless experience to your customers.

- Easily customize and automate post-sales processes by connecting CRM and task management tools.
- Enrich new customer accounts with already existing prospect data.
- Streamline new customer onboarding processes by connecting CRM, support, and project management tools.
- Prioritize support requests based on client payment status or service level agreement.
- Track churn can through customer utilization, waning engagement, limited contact and other data gathered from various integrated applications.
- Efficiently manage upsells by creating bi-directional syncs between your Support Platform and CRM systems.

With General Automation Platforms support professional can spend less time tripping over disparate SaaS apps and more time delivering smiles.

Streamline business operations across the organization

Business ops professionals are tasked with driving operational efficiency across an organization. With so many SaaS apps to connect a general automation platform is a godsend.

- Form requests between different teams: Forms are a great way to structure and standardize requests between groups, creating a simple and transparent process.
- M&A integration: Post M&A systems integration becomes a lot easier when you have a multi-purpose tool that can migrate data and sync data across a wide variety of systems.
- Data warehouse integration: Centralize data from any number of SaaS applications.
- BI integration: Use a general automation platform to integrate business intelligence or data visualization tools and data warehouses.
- Execution layer on BI: Take action automatically from changes in data values from your business intelligence tool by integrating to engagement tools like email and alert platforms.
- Document management: Automate document management based on workflows defined by you.
- React to changes in other third-party systems like contract management software (NetSuite), triggering automatic archiving of documents based on contract provisioning. In complex and always-changing license deals, this process is vital to remain compliant with contract allowances.

Holistically speaking, a general automation tool, is a business ops professional swiss army knife. It's flexible and powerful and can be used in many ways.

Operationalize engineering processes to increase velocity

Engineering ops is a source of advantage. Use General Automation Platforms to improve the velocity of a wide variety of processes.

- Automate the entirety of the deployment process, from general requests and the generation of deployment branches to the commencement of jobs and creation and distribution of services.
- Automate the process by which bug reports and feature requests are gathered and added to project management tools, and necessary parties are notified of their creation. Ensure requesters are updated as they move through the product development lifecycle.
- Facilitate efficient onboarding of new team members by automatically creating login credentials for necessary accounts, introducing the relevant team and location-based groups, granting role-specific access privileges and distributing a welcome email with further instruction.

Imagine your diverse engineering teams happy to use best of breed tools, and you're glad to have these different tools synced up in a coherent and efficient process.

Extend IT and empower the business

Information technology teams are overburdened with requests coming in from across their enterprise to integrate SaaS applications. Use General Automation Platforms to address a wide variety of situations.

- Empower the business: Provide your line of business colleagues with an automation tool that they can manage.
- Replace outdated middleware: Swap out end-of-life legacy middleware with a modern general automation platform that both IT and business can use.

A clicks-or-code general automation platform is a versatile weapon that can support a wide variety of requirements.

Make finance flow with control

Specialized industries with especially rigorous, meticulous processes can also benefit from the ability to control the automated flow of data between applications.

- Automatically gather and consolidate diligence artifacts that are needed for risk management and vendor management.
- Automate secure movement of data through your organization in such a way that it complies with the law.
- Recommend new financial services through comprehensive product utilization monitoring.
- Connect payment data to your support systems to ensure that the support team isn't wasting time supporting non-paying customers.

With General Automation Platforms, finance benefits from a central source of control of the flow of sensitive finance data while also empowering the business with vital information.

Enhance HR and improve people operations

Human resource professionals juggle many cloud applications and many processes. The key to happy and productive employees is a smooth, consistent, and professional processes. With General Automation Platforms you can:

- Automate the new employee onboarding process.
- Updates to employee status in HCM software can automatically trigger credential revokes, account terminations, and other processes.
- File access management can be automated.
- Alerts can be triggered when employees change or interact with privileged information.
- New employee data can be funneled directly from an application tracking system into your HCM software.
- Automate the employee offboarding process.

Automating these processes frees up time that can be reallocated toward longer-term, judgment-based goals: respectively, retain customers, and retain employees.

What are the benefits of general automation platforms?

Benefits of a general automation platform vary widely depending on the use-cases in which they are used. Holistically, GAPs reduce tedious and costly manual efforts to de-silo data and make use of it. But more importantly, GAPS enable companies to do things that couldn't be done before.

GAPs streamline processes that touch multiple applications within a department or across departments. This capability allows workflow builders to leverage their most critical software features to optimize operations in less labor-intensive ways.

In a general automation platform, data flows between applications are controlled through simple front-end interfacing rather than through custom-built, backend integrations. This improvement makes it much easier for a company to scale its processes as the organization grows.

With GAPs companies no longer need to avoid buying best of breed solutions because they are not integrated into their stack. Similarly, businesses buying from mega-vendors can rest assured that the many disparate products offered can be automated with a general automation platform.

You can consolidate the number of point solutions in your stack by adopting General Automation Platforms. GAPS have abstracted many of the standard software capabilities such as conditional logic, data storage, and data formatting so that you may find a general purpose and flexible tool can replace many single-purpose applications.

So companies see general automation tools as a way to grow faster and more efficiently.

Benefits for marketers: higher contribution to revenue

As an example of automation's potential, consider its demonstrable benefits for marketers. According to Aberdeen, an analyst firm:

- Best-in-class marketers are 74% more likely to have a strongly integrated system of marketing technology solutions.
- Marketing contributed 53% more to year-over-year revenues for organizations using well-integrated systems.

Here are benefits from specific marketing use cases.

- An increased conversion rate of marketing qualified leads (MQL) to sales qualified leads (SQL).
- Increased sales team appointments by 13%.
- Higher email open and response rates due to improved personalization.
- Save time for thousands of employees to more efficient event management.

There are many potential benefits to marketers depending on how many workflows you automate and the size and scale your operation.

Benefits for sales: increased revenue with higher productivity

Sales process refinement is the most lucrative form of enablement in modern business. According to Aberdeen, sales streamliners increase company revenue at 2.2 times the rate of all other types of streamliners. Example benefits include the following:

- Less time researching leads due to better data enrichment.
- More efficient sales reps due to more qualified opportunities routed more efficiently.
- More upsell potential because of better insights into usage and happiness of current customers.

There are many more benefits that sales organizations are seeing from the adoption of General Automation Platforms. The only limit is your imagination for improving processes and inventing new ones.

Benefits for customer success: happier customers, happier agents

With so many customers and customer support channels to manage General Automation Platforms help support professionals tame the chaos by automating the flow of customer-related data. So you can spend more time with customers and less time tripping over technology. Here are just a few benefits that GAP customers are seeing.

- Lower customer churn rates due to improvements in proactive monitoring of customer health.
- More efficient customer success reps due to the centralization of data from many different systems.
- Measured improvements in customer satisfaction to do faster response times and quality of interaction.
- Better alignment to revenue retention due to SLA and payment-status integration and automation.

Customer success doesn't live in a silo and GAPs help bridge the flow of information across organizations.

Benefits for business ops: productive people and processes

Business operations professionals benefit from General Automation Platforms in myriad ways. GAPs help business ops streamline processes across many SaaS tools across many departments.

- Avoid consuming costly internal engineering resources for one-off custom projects.
- Reduce internal friction from negotiating access to engineering resources.
- Improve process manageability because GAPs centralize integration and automation workflows.

There are many more benefits of adopting General Automation Platforms.

Benefits for engineering: faster releases that customers value

Engineering teams that use General Automation Platforms report speedier release cycle times because they can spend more time coding and less time managing engineering processes. Because bug and feature request are captured, routed, and ranked more efficiently engineering teams can improve customer responsiveness scores.

Benefits for IT: empower the business to automate

IT teams that introduce General Automation Platforms to business users are seen as saviors who empower them to solve business challenges. IT also benefits from a platform that surpasses requirements for security, reliability, resilience, and scalability.

Benefits for finance: control data and empower people

Finance professional appreciate General Automation Platforms' ability to simultaneously add control to the flow of sensitive financial data from application to application as well as enable business partners with the financial information that can help them manage their business.

Benefits for HR: more hires, happier staff

Human resources professionals benefit from streamlining their processes. Benefits include the following:

- More efficiently process and route the candidate pipeline.
- Happier staff due to smoother onboarding processes.
- More impactful operations through the tighter alignment of MBOs/OKRs.

General Automation Platforms support hiring, training, and retaining employees.

Who uses general automation platforms?

Businesses of all sizes are embracing General Automation Platforms. As long as a company has two or more applications that contain data or functionality that is part of a more extensive business process, General Automation Platforms can be useful.

Industry adopters

The earliest adopters of General Automation Platforms were technology and media companies, but organizations across all industries have since discovered their value.

The ability to quickly build out and automate processes between disparate applications translates to greater control over workflows with less development, which is an industry-agnostic benefit.

Adoption among departments

A diverse base of professionals has begun to champion General Automation Platforms, partly because there is not a significant learning curve associated with using it effectively. By distilling otherwise complex integrations into an intuitive, user-friendly interface, self-service automation becomes a reality.

Most departments within an organization rely heavily on data that originates in a broad swath of applications, and not all of these applications are confined to a single department. Workflows between sales and marketing, for instance, and sales and support are expected to overlap at some point. The question is, will data flow automatically through those junctures, or will it cause process deficiencies that frustrate employees?

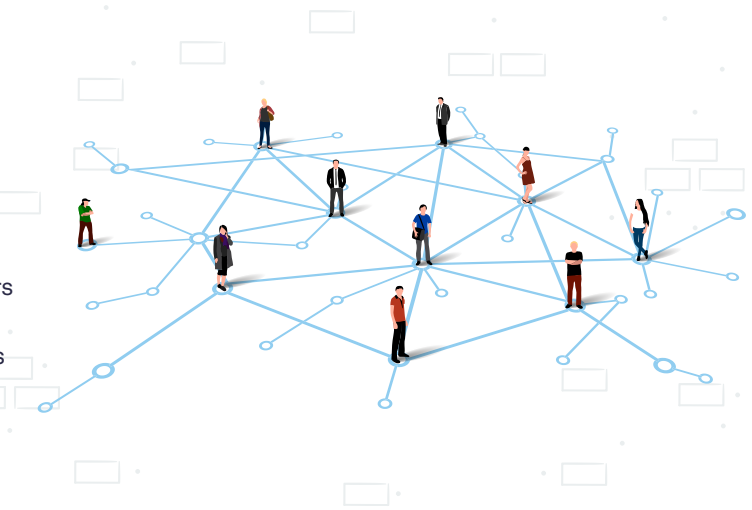
To help prevent the latter scenario, the following departments, in particular, have turned their sights to General Automation Platforms:

- Marketing
- Sales
- Support
- Operations
- Engineering
- IT
- Finance
- HR

Top users and what they can do with General Automation Platforms

Today's general automation platform power users tend to hold operations roles such as marketing ops, sales ops, support ops, business operations and developer ops. This is primarily because these professionals are ingrained in workflows that rely heavily on the timely movement of accurate, up-to-date data between critical applications.

The other substantial power-user base is comprised of administrators for one or more core applications. Fine-tuning the performance within applications is challenging enough; however, the modern application administrator must also fine-tune performance between applications. Workflows are not confined to individual apps, which means app administrators are increasingly being encouraged to zoom out of silos and manage apps more holistically.



Worksheet: are you ready for general automation platforms?

Use this worksheet to determine if your company is ready to use General Automation Platforms.

For each category, select the appropriate number. If you strongly disagree, choose 1. If you strongly agree, choose 5. The numbers in between 1 and 5 correspond to your level of agreement, neutrality, or disagreement. Tally your score when you're finished, and follow the instructions at the end.

To interpret your results, sum your score.

- If you scored > 30, you're ready for a general automation platform.
- If you scored between 20 – 30, you're moving in that direction. You should consider getting started with automation very soon.
- If you scored under 20, you might not be ready for a general automation platform quite yet.

Factor	Disagree ↔ Agree 1 2 3 4 5
Automation can be a source of competitive advantage.	
We have one or more staff that has to regularly engage in time-consuming manual work to move data from point A to point B.	
We're not able to accomplish workflows that just can't be done manually (e.g., lead management, mapping payment data to CRM, behavior-based personalization)	
Our company would benefit from better visibility of data stuck in different systems.	
Connecting tools and coordinating processes has the potential to improve the customer experience.	
We have two or more applications that should be integrated.	
The native integrations available to us are insufficient for our needs.	
Our desired solution requires more than a 1-step point-to-point integration.	
We do not have access to developer resources with coding skills.	
The cost of paying a developer to custom code an integration, the cost to retain him to manage and update the integration and the cost of waiting for a custom project exceeds the price to buy a general automation platform and the time to value of doing so.	

Case Study: DigitalOcean

DigitalOcean Uses Tray for Just-in-Time, Personalized Marketing

Connects Segment, Marketo, Salesforce, GetFeedback, and Slack to automate sales and marketing workflows handling millions of daily events

Industry: Technology

Location: New York, New York

Employees: 300+

Solution: Tray.io Sales and Marketing Cloud

Highlights:

- Built a data-queuing and segmentation engine between Segment and Marketo to route millions of events for more effective email campaigns
- Enriched Salesforce Service Cloud data for a single source of truth for the customer relationship
- Connected Segment and GetFeedback to automate and scale Net Promoter Score program
- Drove broader visibility with alerts in Slack from form fills and status changes in Salesforce

It's the fastest growing and the second largest cloud computing platform in the total number of public-facing apps and websites according to Netcraft. DigitalOcean, founded in 2011, is sailing full-steam ahead in its quest to be the top cloud platform for developers in the world. And with nearly one million registered users taking advantage of its simple and robust platform, DigitalOcean is well on its way.

Challenge: Connect Segment and Marketo without using developer resources

To help it maintain its phenomenal growth, DigitalOcean chose Salesforce as its customer relationship management platform. As the company rolled out Salesforce to its customer-facing teams, it began looking for a marketing automation tool that would work hand-in-hand with Salesforce. Marketo was selected by DigitalOcean in part because of the ability to integrate it with Salesforce.

David Dorman, Director of Growth and Demand Generation at DigitalOcean, had a vision for connecting the company's customer data platform (Segment) with Marketo and then connecting Marketo with Salesforce for a streamlined, efficient workflow. "Connecting the systems and workflow would let us be smart about how we communicate with users," says Dorman.

Because of the expense and amount of time it takes to develop a custom integration solution, Dorman knew that his team needed an automation tool that didn't require developer resources. In fact, the DigitalOcean team already had what they thought would be the right tool for the job. However, as DigitalOcean prepared to deploy Marketo, it became clear that the original plan for integrating the systems was not going to work as the touted integration was not comprehensive enough, especially when it came to event

segmentation. That's when Dorman and his team turned to Tray.io.

Phase I Solution: Integrate and automate two core systems with Tray.io

While the team at DigitalOcean was skeptical at first, it quickly realized that the Tray.io Sales and Marketing Cloud could do everything that DigitalOcean needed and more. From Tray's deep expertise in Marketo to its ability to handle data from millions of events per day from Segment, the integration platform vendor was exactly what Dorman's team was looking for.

With help from the Tray.io Customer Success Team, DigitalOcean mapped its workload, defined what it wanted to achieve, and solved its most pressing integration issue. The Tray solution to integrate Segment and Marketo was in production in less than 30 days with no development resources required. "Tray's Customer Success Team is fantastic," says Dorman. "I can't emphasize enough just how good the Tray folks are at what they do."

Phase II Solution: Continue automating across the marketing stack

With the initial integration under its belt, DigitalOcean began what it views as phase II of its Tray journey. Explains Andy Hattemer, Senior Growth Marketing Manager and Tray user and evangelist at DigitalOcean, "We're constantly finding new and interesting use cases for Tray within our organization. In terms of value from the platform, the only limit is in ideas about how to connect data to action, whereas before we were limited by technical capabilities or level of effort."

Some of the additional use cases DigitalOcean has already implemented with Tray include:

- Adding location data to improve customer segmentation

DigitalOcean uses Tray to pull in data originating in its cloud platform and enrich the data with geolocation information. Tray then puts the enriched data into Segment, where it's made available to other applications within DigitalOcean.

- Sharing test result data for real-time insight and agility

Tray pulls data on email and onboarding tests from Segment and summarizes the results before putting them into Slack.

- Enriching Salesforce Service Cloud data

Using Tray, DigitalOcean enriches Salesforce service cloud accounts with core data to provide a single source of truth for customer relationships. After starting small with one segment of accounts, DigitalOcean now enriches millions of accounts in Salesforce using Tray.

- Collecting Net Promoter Scores at greater scale

DigitalOcean uses Tray to connect Segment and GetFeedback, and then automatically send customer satisfaction surveys within an active user base of more than a half-million customers.

- Driving broader visibility with alerts

Tray creates Slack alerts based on form fills and status changes in Salesforce to create greater visibility into actions.

- Results: Use data streaming for just-in-time, personalized marketing

Tray is now a core part of the DigitalOcean marketing technology stack. "With Tray, we can update and integrate workflows and transform data without needing any engineering resources," says Dorman. "Tray is the solution to workflow gaps that we wouldn't have linked up before because of the effort." Adds Hattemer, "Lower complexity things that we would have had to go

to the engineering team for, we can now handle ourselves by adding or updating a workflow in Tray."

For the DigitalOcean marketing team, the value that Tray brings extends beyond being able to take things into their own hands. "Tray gives us speed, agility, visibility, and cost savings," says Dorman. "And better yet, it lets us be proactive with our marketing in a way that we couldn't before. Tray has become a core part of our marketing infrastructure."

Hattemer explains, "In the past, our marketing was more reactive and old school. We'd go and look for an audience, and send a wave of messages. Now, we have a Tray-powered workflow where prospects and customers are getting the right message at the right time as they interact with our platform and our marketing."

Dorman says that Tray has opened his mind to how to make smarter use of his marketing technology stack. "We can look across the end-to-end stack and connect any of our tools to gain total control," says Dorman. "This is the next wave of what a marketing stack will look like and Tray lets us fulfill that vision. We now have live-streamed marketing that lets us personalize messages and deliver them at just the right time."

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David Dorman,
Director of Growth and Demand Generation

Part two: Why GAPs are gaining momentum in the marketplace

The widespread adoption of cloud applications is the single most significant driver of the general automation platform's increasing momentum. The average number of Software-as-a-Service applications has spiked in the past 15 years, which has led to an increase in the number of operations professionals being brought on to act as application administrators.

Additionally, the proliferation of SaaS now means that its competitive advantage is dissipating. The value of SaaS is indisputable, but even industry laggards are on board now. As a result, many organizations have a renewed interest in developing a competitive advantage through streamlining processes to optimize the performance of their existing applications.

Other top trends that have catalyzed the general automation platform's momentum include:

Changing buyer behavior across many different touch points and companies' quests to offer a cohesive customer journey.

Integration hiccups and a general lack of ability to quickly and efficiently automate processes have created far too many friction points in the customer journey. Countless organizations choose not to go with the best apps because they can't optimize for each stage of their customer journeys.

Preference for selecting best-in-breed applications over all-in-one hubs

Along those same lines, General Automation Platforms allow for easy, flexible automation between multiple best-in-breed software that does one thing very well. This is in contrast to all-in-one tools that do many things that are "good enough." The result is increased overall value potential in the form of fewer customer friction points.

Preference for software with good APIs

Software buyers now value the capabilities of robust and well documented APIs. As such, availability of good APIs are a top requirement driving software purchase decisions.

Building your tools around your processes instead of building processes around your tools.

A tool loses its utility if you start catering to its capabilities as opposed to it catering to your process needs. As organizations become increasingly cognizant of this fact, the need for General Automation Platforms becomes more apparent.

Great API applications

APIs are enablers of a more complete, flexible enterprise resourcing architecture that allows data to move freely in any direction. General Automation Platforms help realize this potential without creating additional complexity for users and department heads. For all of these reasons and more, General Automation Platforms have risen to prominence in the past few years.

Case Study: AdRoll

AdRoll Integrates Disparate Lead Data to Target the Best Opportunities

Integrates Clearbit and BuiltWith with Salesforce to continually enrich 650,000 opportunities

Industry: Marketing Platform

Location: San Francisco, California

Employees: 500

Solution: Tray.io Platform

Highlights:

- Integrated lead enrichment sources with CRM to enrich 650,000 global opportunities
- Checks website ranking in Clearbit weekly and updates Salesforce as needed
- Updates Salesforce with data from BuiltWith on over 200 different attributes

AdRoll is a leading performance marketing platform with over 35,000 clients worldwide. Its suite of high-performance tools works across devices, helping businesses attract, convert, and grow their customer base. The company is home to the world's largest opt-in advertiser data co-op, the IntentMap™ with over 1.2 billion digital profiles. AdRoll's goal is to build the most powerful marketing platform through performance, usability, and openness.

Challenge: Identify top opportunities for targeted sales and marketing

Like many B2B companies, AdRoll relies on Salesforce, its customer relationship management system, to track and manage sales opportunities. However, how AdRoll uses some of the fields within Salesforce is unique. Brendon Ritz, marketing operations lead at AdRoll, explains: "We use the opportunities object in Salesforce as an account object and that lets us track 'advertisable' web properties as individual opportunities." AdRoll then uses the Salesforce

account field to denote the company that owns the web property.

Adapting Salesforce fields for customized uses can present a major challenge when integrating Salesforce with other systems. "The overall rank of a website is integral to how our company operates," says Ritz. "Because our sales teams are organized by this rank, we need to enrich every opportunity in Salesforce with this information and keep it updated as rankings change."

While a standard integration is available between Clearbit, the company that AdRoll uses to provide the website rank and other enrichment data, and Salesforce, that integration couldn't support AdRoll because of how the company uses the opportunity field. AdRoll needed an easy, fast way to accurately refresh the website rank for approximately 650,000 Salesforce opportunities on a weekly basis.

Solution: Use Tray.io to create flexible and powerful integrations

Based on a referral from Clearbit, AdRoll turned to Tray.io to help it solve its integration problem. Tray is an API integration platform that uses no-code configuration to empower business people to integrate and automate processes.

Tray helped Ritz create the integration, then test and deploy it. The result is a flow within Tray that runs each weekend and checks every opportunity website in the Salesforce database against the Clearbit database, refreshing and enriching the data if needed.

With the website rank problem solved, Ritz quickly identified the next use case for Tray: updating analysis data on other website attributes in Salesforce. "We can correlate these attributes with the propensity to convert," says Ritz. "The data we use for this comes from BuiltWith, which analyzes website source code to identify various website characteristics."

AdRoll previously used custom code to take data from BuiltWith and put it into Salesforce, but the code didn't include the logic needed to identify and remove attributes that were no longer being used. This led to out-of-date information in AdRoll's Salesforce opportunity records and, consequently, unhappy sales teams. Ritz used Tray to rapidly create an integration between BuiltWith and Salesforce that correctly refreshes the data and removes it when attributes are no longer being used.

Results: Enriched, fresh, and accurate opportunity data drives success

Today, the 200 strong sales and marketing organization has the data it needs to target top opportunities with the greatest propensity to convert, based on website rank and attribute data. "We used to get a lot of complaints that sales and marketing didn't have the data they needed to succeed," says Ritz. "We don't hear that anymore."

With the two integrations to date, Tray manages five million pieces of data for AdRoll each week. Ritz knows that he can easily increase the volume and type of data he's automating and integrating with Tray. "We used to track only a handful of attributes, and now we're tracking upwards of 240," says Ritz. "That's because adding a new attribute to track is so easy with Tray."

Tray helps Ritz and the rest of the revenue operations group make sales and marketing processes run as efficiently as possible and deliver everything needed to maximize revenue opportunities. "Tray is the most powerful and flexible process management tool out there," says Ritz. "Any time you have a use case where two systems need to talk to each other, Tray is ideal."

> Tray is the most powerful and flexible process management tool out there. Anytime you have a use case where two systems need to talk to each other; Tray is ideal.
>
> **Brendon Ritz,**
> Marketing Operations Lead

Part three: How are general automation platforms different?

With so many software categories and noise, it's easy to get confused on what software does what. Here's a summary of where General Automation Platforms fit in the world:

- **In application automation features:** Many software categories promise "automation" but you will find that their purview is limited to a more narrow set of functions and data than what a GAP can handle. For example, Marketing Automation Platforms can automate the collection of data from web forms and also automate the sending of emails.
- **Native integration:** Native integration offered by software vendors can be a decent solution for some situations. However, the more flexible the software, the less likely that native integrations will work out of the box. Software vendors can only build so many native integrations before they run out of engineering capacity. That means you may not be able to integrate all the different parts of your stack. If you have multiple native integrations, it becomes harder to troubleshoot and fix many point-to-point integrations.
- **Point-to-point integration software:** these vendors often are designed for SMBs and are limited in scope, support, or scalability. GAPs provide a platform that can scale from simple workflows to enterprise-level complex workflows. Some buyers graduate from point-to-point integration software to GAPs but pay a transition cost.
- **Extract, transform, load (ETL):** ETL software typically supports batch processing of data. Sometimes this is a one-time operation or can be a schedule and recurring operation. GAPS can support real-time data movement as well as batch processing. Many organizations require a platform that can support batch and real-time. ETL tools are often managed by data warehouse team whereas GAPs can be handled by both data warehouse teams or by business teams that manage line of business cloud applications.
- **Enterprise service bus (ESB):** These IT-centric integration platforms that require developer resources and are perceived as complex because they require maintaining coded interfaces. ESBs are typically used for application integration and managed by an integration competency center. ESBs often do not support cloud applications. GAPs do not require dev resources but have many of the capabilities of ESBs.
- **Business process management (BPM):** Business process automation tools are designed for IT teams to document and create processes. GAPs are designed for business teams to integrate and automate processes. Because of GAPs visual workflow builder and customizable labeling, there is typically no need for a separate BPM tool in addition to a GAP.

Case Study: Outreach

Outreach.io Supports Incredible Growth by Closing Workflow Gaps

Improves productivity by integrating and automating processes across Slack, Salesforce, Marketo, Google Sheets, email, CSV files, data storage, MailLift, web forms, and G2Crowd

Industry: SaaS

Location: Seattle, Washington

Employees: 150

Solution: Tray.io Sales and Marketing Cloud

Highlights: Closes automation gaps and improves communication and responsiveness across the sales and marketing work ow, including:

- Extracts and enhances lead list data sent from vendors via email and automatically loads it into the Marketo marketing automation solution to get leads to sales people in seconds.
- Triggers automated Slack alerts based on keywords in content to improve communication with the sales enablement team
- Provides an automated work to request items be sent out such as thank you notes and swag, improving sales productivity

One of the most important parts of the sales process is communication. Sales teams need an effective and efficient means of following up with contacts. That's the premise behind Outreach.io, a cloud-based engagement platform that automates and personalizes communications so that sales teams can provide each and every lead, opportunity, and customer with targeted content to accelerate and increase sales.

In just a few short years, Outreach has garnered hundreds of big-name customers, attracted millions of dollars in investment capital, and is growing by leaps and bounds as it transforms the way sales professionals communicate.

Challenge: Close gaps in the sales funnel

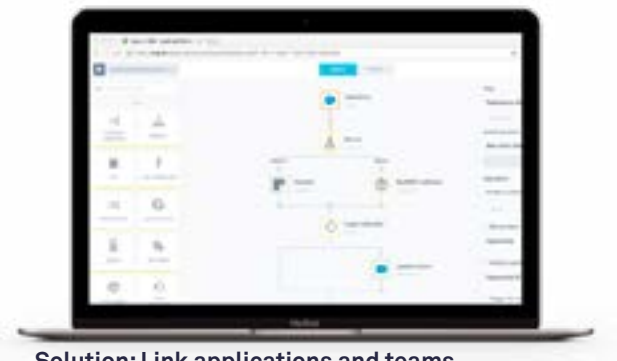
While Outreach.io helps its clients make their sales team's outreach more effective, the company's director of demand generation, Dan Ahmadi, is focused on helping the Outreach.io sales and marketing team reach more prospects and close more sales, quickly and effectively.

Despite deploying tools and systems to automate the marketing and sales process, Ahmadi was frustrated by the gaps that still existed.

"In an organization that's growing as fast as Outreach, one of the biggest challenges is providing a funnel that can scale at the same rate across all parts of the sales cycle," says Ahmadi. "As great as marketing automation tools are, they can't give you full integration and automation across the entire sales workflow. As a result, you're constantly cutting and pasting to get the info where it's needed. I knew that wherever we were doing this, we should instead be integrating and automating."

While the applications that Outreach uses offer open APIs, it requires engineers to learn how to use the APIs and create the integrations. Outreach needs its engineering resources for more strategic tasks such as developing the sales workflow solutions that drive the business and working with external customers on their

own integrations. Plus, says Ahmadi, “I wanted control of the process and the ability to build those integrations on my own.”



Solution: Link applications and teams with Tray.io

Luckily for Ahmadi, he knew just the solution that would allow him to do so. Having discovered the advanced integration platform offered by Tray.io on a product search for his previous job, Ahmadi realized that Tray.io Sales and Marketing Cloud would serve his needs at Outreach. Although he evaluated integration solutions from other vendors, Tray was the only one to offer the branching logic that would deliver the sophistication and versatility that Outreach required.

Once Ahmadi and team decided on Tray, implementation was swift and easy. “We were eager to start getting value out of the integration platform immediately,” says Ahmadi. “Our contact at Tray helped us draft out what we wanted and within a week he delivered fully built-out solutions.” Those solutions then made it possible for Ahmadi to learn how to use Tray on his own.

Use cases: Streamline and automate processes and communication

Ahmadi focused first on the leads that a third-party lead-generation vendor emailed to the company on a regular basis. Now rather than manually inputting those leads into Marketo (a marketing automation platform), the emails are fed directly into Tray via webhook from the third-party vendor, which uses business logic to enhance and enrich the data before automatically feeding it into Marketo (which in turn is integrated with Salesforce).

The Outreach team is also taking advantage of Tray’s Form Connector, Data Storage Connector, and Slack Connector features to trigger a flow of information that automates the process of requesting items such as thank-you notes or swag be mailed out to customers or prospects. Now, everything from creating the request form to approving the request via Slack or email, and routing confirmation back to the initial requestor is built within Tray with integrations to MailLift. Best of all, says Ahmadi, “No work on our part is required to make this happen. Anyone in our sales and marketing organization can take advantage of this automated workflow.”

Another integration includes using Tray to “listen” to Slack channels, filter conversations for certain keywords, log those conversations to a Google Sheet, and generate alerts to the sales enablement team whenever a relevant conversation is happening that the team needs to know about, without requiring the team to join every channel on Slack to get notifications.

Results: Increase organizational knowledge and enhance productivity

For Ahmadi, one of the greatest benefits of Tray is the fast and effective dissemination of information throughout the sales organization. “With every conversation and notification in Slack being piped into Tray, I know that the right people are being notified about the right things,” he says. “This allows the sales enablement team to respond rapidly.”

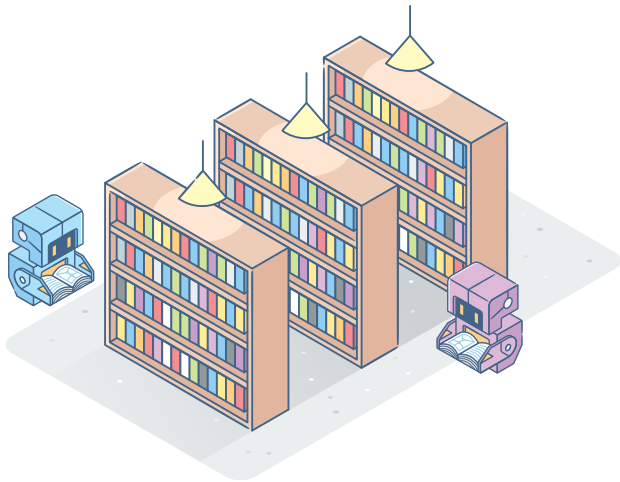
The fast response times facilitated by the Tray integrations have also made Outreach’s sales and marketing teams work in a much more connected—and thus productive—fashion. Says Ahmadi, “Not only can our sales reps now expect to receive requests for product demos (and more) within minutes, our sales enablement team has a far better understanding of the sales reps’ pain points at any given time.”

Perhaps best of all, the leads being delivered to the sales team are of a higher quality than ever before because of the data enrichment made

possible by Tray-facilitated integrations. Says Ahmadi, “I’d definitely recommend Tray.io to any company that has problems that can be solved by connecting cloud systems. You can take data, transform it, load it exactly the way you want, and own that process—that’s the beauty of Tray.io.”

Next steps: Integrate and automate across the company

With 20 percent of the company already employing Tray, Ahmadi expects usage to grow steadily. “Our company uses somewhere between 50 and 100 different SaaS systems, all of which could be integrated and automated to make processes more efficient,” says Ahmadi. “This means that there’s enormous potential for other departments (such as human resources) to use Outreach to gain the same kind of just-in-time intelligence that the sales team has already started to enjoy.” And because Tray.io Sales and Marketing Cloud is flexible and scalable, it’ll handle any complex workflows and future integrations that Outreach needs to automate.



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>
> **Dan Ahmadi,**
> Director of Demand Generation, Outreach.io

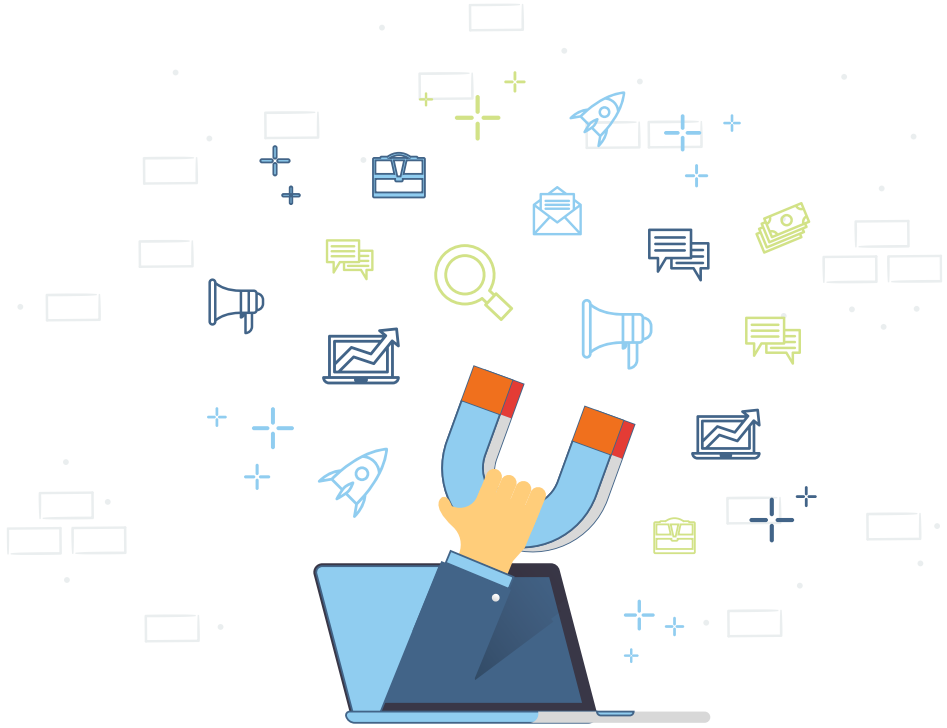
Part four: Common features in general automation platforms

General Automation Platforms offer a wide range of capabilities and features including connecting any API enabled service, authentication, triggers, visual workflow builder, dashboards, data formatting, logical operators, logs, data storage, processing scalability, multi-user access management, alerting, security, resilience, compliance, and system status.

One of the most important features of General Automation Platforms is that they do not require coding to configure or manage.

Each vendor has different capabilities and strength and weaknesses across categories of features. We've offered a quick table to help you assess vendors by using three handy labels:

- **Standard:** most vendors offer this feature.
- **Occasional:** some vendors offer this feature.
- **Unique:** few vendors offer this feature.



Connecting to services

Accessing and connecting to different applications is a fundamental building block of General Automation Platforms. This is a critical aspect of vendor selection because if you can't connect to it, you can't automate it. There is broad variance in connector coverage and depth of integration across vendors. It's also critical to consider the responsiveness of vendors to customer requests for new connectors or enhancements to current ones.

Standard

Pre-built connectors
These are the services logos that you'll see on many vendors websites. The vendor has already done the work to build a connection tailored to a particular cloud application.

REST API support
Rest APIs are the standard modern way to build API connections. They are somewhat easier to work with than older methods.

Occasional

Full API access
Not all vendors can access all portions of an API such a custom fields. Make sure you verify that a vendor can not only connect to the services you need but are also able to access all fields within the services.

Universal Connector
Universal connectors allow a vendor to connect to any standard API even if they do not offer a pre-built connector to it. This capability is an important reason not to rule out a general automation platform because they do not have a particular pre-built connector on their website.

Automated retries
This feature is vital in ensuring that your workflows run smoothly. APIs can often have hiccups and produce a failed call request. Automated retries continue trying the API until it succeeds in accessing the requested data.

Connector versioning
Software vendors frequently update their APIs and when they do integration and automation platforms are forced to upgrade their connectors. Some vendors are more adept at versioning their connectors in a way that minimized interruption.

SOAP API support
SOAP is an older and more complicated method for building APIs. If you happen to use one or more SaaS applications that only offer SOAP API support verify that your general automation vendor can connect to it.

Unique

Connector builder
The building of pre-built connectors is historically a manual and labor-intensive process for most vendors. Because of the highly technical nature of building connectors, typically only engineers working for a vendor has the skills to do so. This limitation means that requests for new connectors or enhancements to current ones can take weeks to turn-around. Now, there are only a few vendors that have made the building of connectors easy enough for customers and third parties to build themselves. Connector builder software speeds-up the turnaround time to hours and democratized the ability to do so.

Authentication and user access

Authentication is the key to unlock access to APIs. Again, if you can't authenticate, you can't automate. While some authentication features are black and white in that either a vendor offers them or not, there are some features that grey and are more related to ease of use. These authentication features can have the ability to improve productivity.

Standard

Credential-based authentication
This feature is as simple as typing in your login and password to access the API of a particular service.

Token-based authentication
Some services control API access by granting a unique token (usually a long string of letters and numbers) to a user. That way you don't have to enter your login and password into a third-party software.

Occasional

OAuth-based authentication
Some cloud applications use this open standard for access delegation. Companies such as Amazon, Google, Facebook, Microsoft and Twitter use OAuth.

Permission scope controls
This feature makes it as easy to manage access to certain parts of your apps' API as clicking a checkbox.

Multiple authentications per workflow
In multi-step workflows, it's often necessary to access various accounts.

Multi-user access
Manage user access and permissions.

Unique

API credential keychain
A keychain manages access to all of your apps in a central place. This feature can save time from having to enter authentication credentials multiple times across different automations.

Triggers

Triggers “listen” for events in your connected apps to initiate workflow automations. There are a variety of ways to kick-off workflows.

Standard

SaaS service trigger
Events from your Cloud app proactively send out a signal to your General Automation Platform when data changes.

Manual trigger
Test your workflow at your convenience by clicking a “run” button.

Occasional

Webhook trigger
Webhooks allow you to catch callouts for any service that offers to send a signal to a custom URL.

Scheduled trigger
Grab data from a service at a specified time or interval. Some platforms will enforce limits on how regularly a schedule runs while others have no limits.

Unique

Form trigger
Create custom web forms and trigger your workflows upon their submission.

Callable trigger
Callable triggers break up a workflow and call them from another workflow. This feature enables users to build more complex workflows and reuse one workflow across many workflows.

Data formatting

Data formatting tools help users transform data across systems that have different formatting requirements.

Standard

Text formatting
Filter, format, and transform strings.

Data and time formatting
When different apps use different date formats, you can too.

Occasional

Math
Run basic arithmetic on number values in your workflow.

List formatting
Retrieve data and manipulate items in a list with simply named operations.

Unique

Crypto formatting
Encrypt and hash data, so you know it’s safe.

Object formatting
Easily extract data from any object.

Visual workflow builder

Workflow builders are fundamental to General Automation Platforms. There is a lot of variation in the marketplace with this capability.

Standard

Pre-built automation templates
In a few clicks, configure multi-step workflows via an online wizard for many popular automations.

No downloading necessary
Believe it or not but not all integration and automation platforms are 100% web-based. Some require downloading programs or third-party tools.

Occasional

Drag-and-drop workflow builder
Configure automation with an easy drag-and-drop workflow editor.

Point-and-click data field selection
Interactive field lists that show all available field from a connector make it easy to select the fields to connect.

Dashboards
This feature allows you to check workflow success without manually inspecting each one.

Workflow labeling and search
Quickly find the one workflow you need out of many

Clone workflows
The ability to clone and modify workflows is a feature that can save you time.

Unique

Multi-pull workflows
Get data from one or more sources in a single process. Some vendors can only support simple operations that pull in data from one source.

Multi-step workflows
This feature is critical in creating more complex workflows.

Multi-push workflows
Post and create data in one or more sources in a single process.

Bi-directional syncing workflow
It's non-trivial to keep two different software applications in sync with the same data. Only some vendors can support this in a process efficient way.

Logical operators

Logical operators are the brains behind workflows. They decide what to do with the data that is flowing along your workflow. Conceptually, logical operators are similar to formulas and functions available in spreadsheets.

Standard

Data mapper
Easily map data between steps in your workflow; join or transform the data type.

Occasional

Branch
Compare a single value against multiple different options and follow the match. CSV
Get CSV file details, get rows from CSV files and parse CSV text.

HTTP client
Make a REST-based request to a specified URL.

FTP client
Download a file or list all files in a directory in both FTP and SFTP.

Send mail
Use a workflow to send emails to yourself or anyone else.

Unique

Boolean condition
Use powerful “if/then” logic and run part of your workflow only some of the time.

Call workflow
Break up large workflows, pass data between workflows, and reuse one workflow in multiple workflows.

Data storage
Store data for recall between steps.

Delay
Set a time delay on an event to begin when you need it.

Loop collection
Extract fundamental data points out of arrays or objects.

Mustache template
Use the template connector to pass data through a mustache template.

Script
Write custom code and execute a block of JavaScript code synchronously or asynchronously.

Map data between historical steps
Use the data from any previous workflow step later in your workflow.

List handling
Lists at higher scale, including pagination and volume.

Logs

Logs are the place to troubleshoot and inspect a workflow that is running or has run. Well thought out features and user experience can save users a lot of time in finding errors and correcting them.

Standard

Log history
Most vendors offer a repository of workflow history.

Occasional

Real-time logs
Run logs in real time to spot small issues quickly.

Customizable log retention
Customer-defined log retention time to comply with your security policies.

Unique

Advanced debugging of logs
Search and filter logs on any property for fast debugging.

Data processing

General Automation Platforms differ widely on the speed and volume of data that they can process. Make sure that you test your use case with the vendor to ensure that processing latency or capacity isn't an issue.

Standard

Processing latency
Many vendors do not offer real-time processing and instead have differing amounts of lag in the kick off of processing a workflow.

Occasional

Alerting
Know when a workflow process fails; customize how alerts are triggered.

Data storage
When building workflows, it is helpful to store data temporarily.

Log data storage
Store log data for you to inspect workflows that executed in the past.

Unique

Real-time workflow processing
Never a delay in the scheduled start time of the workflow or its execution.

Infinite scalability
Scale up or down for an unlimited number of workflow tasks.

Trust

General Automation Platforms offer differing degrees of transparency, security, compliance, and resilience. If your running mission-critical workflows and your company has security policies, this section will be an essential read.

Transparency

Information on service availability and performance

Occasional

System status
A publically available system status page offers full transparency with a real-time and historical performance view of all technical components.

Security

How vendors safeguard your data can differ.

Standard

Encryption
Encrypt all of our sensitive data, authentication, and tokens.

Network security
All communications between your browser and a vendors website are encrypted via HTTPS.

Occasional

Log data retention
Some vendors offer flexible log data retention policies designed to fit your requirements.

Virtual private cloud
Data is held on servers, not open to the public.

Session management
Monitor sessions by IP address, location, time, browser and operating system and revoke access to prevent unauthorized access to your account.

Unique

Two-factor authentication
Add a second layer of security to protect fraudulent access to your account.

Password prompting
Any significant account action will prompt a user to re-enter her password.

Behavior modeling
To detect unusual or suspicious activity on a user's account, we use technology to build intelligent models of user behavior.

Resilience

How vendors ensure high availability can differ. This is an important criterion for any organization that intends to depend on their workflows.

Standard

On-call policy
Most vendors have an around-the-clock support network of engineers who work very hard to keep a vendor's software running all of the time. They typically have an on-call policy for their engineers to be available just in case.

Data backup
Vendors' platforms should have automatic back-ups built in so data is never at risk of being lost.

Occasional

Workflow backup
Vendors' should store snapshots of their customers' business logic so they can revert them if necessary.

Infrastructure backup
endors' infrastructure should be replicated and backed up so that no capabilities are at risk of shutting down.

Compliance

Technical certifications comply with industry standard requirements. Vendors should be able to provide a comprehensive compliance program with certifications and attestations.

Standard

Privacy policy
Privacy policies are standard for most vendors and assure customers that data will be held privately in almost all situations.

Occasional

SOC 2
The American Institute of Certified Public Accountants (AICPA) Service Organization Controls (SOC) reports give assurance over control environments as they relate to the retrieval, storage, processing, and transfer of data. The reports cover IT General controls and controls around availability, confidentiality, and security of customer data and are issued for 6-month periods each year.

The SOC Type 2 reports cover controls around security, availability, and confidentiality of customer data. Regular SOC 2 audits are conducted by an independent, third-party auditing firm. You should be able to contact a vendor to request the latest copy of their SOC 2 audit.

Unique

Penetration testing
A vendor can and should undergo regular penetration testing by independent third parties to ensure that their platform is secure.

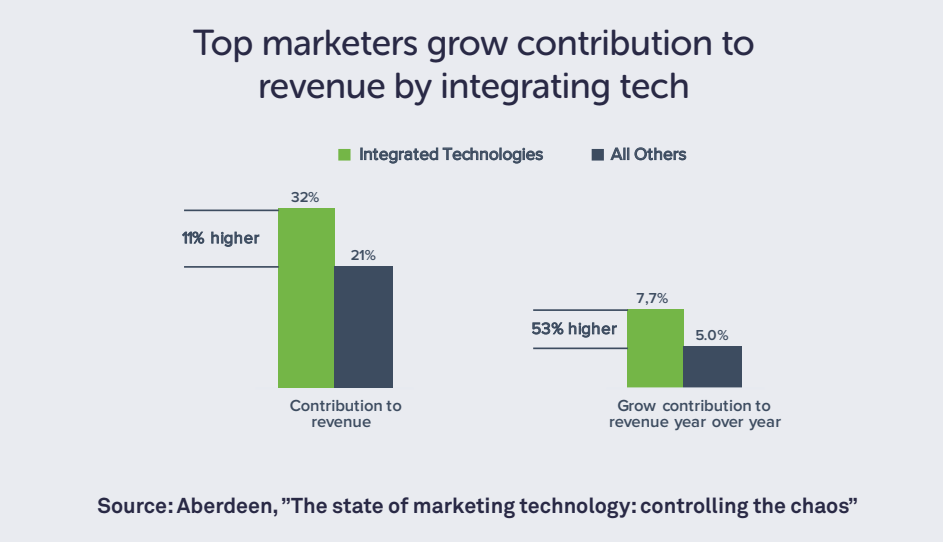
Part five: Business case for general automation platforms

The return on investment of General Automation Platforms includes measurable improvements in business metrics and harder to quantify new capabilities that have the potential for step-function improvements to your business.

The core business case for General Automation Platforms include the following:

- Faster revenue growth
- Lower costs
- More productive workers

GAPs produce faster revenue growth due to the benefits of streamlining marketing and sales processes. Benchmark studies from analyst firm Aberdeen Group show the following:

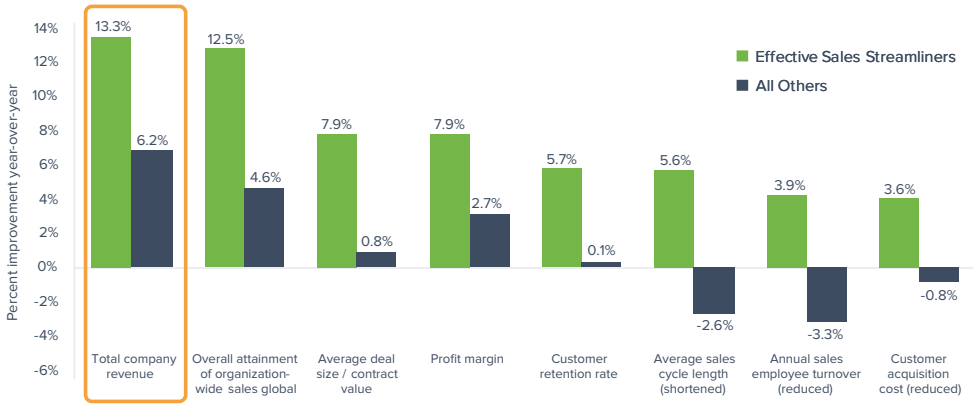


Source: Aberdeen, "The state of marketing technology: controlling the chaos"

Automated organizations grow revenue faster

Effective sales streamliners increase company revenue at 2.2x the rate of All Others, YOY.

Streamlining Sales Workflows – The Killer Competency



Source: Aberdeen, "The competitive edge in effectively streamlined sales workflows"

Use-case specific improvements

Depending on your particular use cases for a GAP you could see improvements in many different business metrics. Here are just a few measure improvements by Tray customers:

- Outreach.io measured an increase in the conversion rate of marketing qualified leads to sales qualified leads.
- AdRoll measured a 13% improvement in sales team appointments
- Vox Media estimated a 20X reduction in lag time to create a new customer onboarding project

The benefits you will see depend on the process that you automate.

GAPs contribute to gains in worker productivity

GAPs can eliminate wasted time by staff on any manual process involving moving or manipulating data. For example, if your marketing managers regularly have to load lead lists into their marketing automation platform then a GAP can free up that time to be applied to more valuable tasks.

GAPs improve process agility

Because GAPs provide a central place to manage all integrations and automation, you can rapidly iterate your processes.

More ROI as organizations mature in their use of GAPs

The benefits of a General Automation Platform depend on where your organization is in the technology maturity curve. Companies that are more mature in their use of GAPs will see a higher impact from their investment.

- Level 1: Point-to-point integration
- Level 2: Multiple point-to-point integrations within a department
- Level 3: Multi-app, multi-step integrated workflows
- Level 4: Core system of one department
- Level 5: Multi-department workflows
- Level 6: Company-wide standard

We see companies progress through these levels reasonably rapidly. It's not uncommon for an organization to mature from level one to level six in twelve month time. This progression means that organizations can see an acceleration in ROI over time.

Lower software costs

GAPs often lower software costs for companies due to the following:

Reduce the need to buy additional users licenses to other software

Reduce the number of single-purpose applications in your stack

Bringing it together

Now you can summarize the return that your organization will see from an investment in a General Automation Platform.

Follow these steps:

1. Measure the baseline metrics of the processes that you seek to improve with the power of automation.
2. Quantify the amount of time that it takes to accomplish each step in a process.
3. Estimate the cost of the resources that are currently engaged in manual processes.
4. Document if there are any processes that just cannot be accomplished without an automation platform.
5. Calculate any cost savings due to reducing spending on other software tools.

Now you can drop the results into a simple spreadsheet and track the “before” and “after” in side-by-side columns.

Investment and costs

Now that you’ve considered the return of a General Automation Platform, now it’s time to estimate your investment.

The product pricing model for GAPs are a function of the following factors:

- The edition or packing of value-added features required
- Number of workflows
- Volume of data flowing through your workflows

The support and training pricing model for GAPs depend on the following:

- Service-level agreements on support availability and turn-around time
- Amount of training required

The configuration consulting portion of the costs can vary as follows:

- Zero cost if you have the time and skills necessary to configure the software yourself.
- A fixed amount of configuration consulting to get you started.
- A customized statement of work that is scoped to your particular needs.

Now just add these three cost items into your handy-dandy ROI spreadsheet.

Time to value

Executives prefer investments that have high ROI and low time to value. Time to value is calculated from the project start date to the point where the project starts to deliver value. Be sure to compare the time to value for the options that you are considering. Depending on the processes that you are automating you could estimate a wide range of times to value between one week to several months.

Getting stakeholder buy-in to move forward

Once that you are convinced that investing in a General Automation Platform makes sense, then your task turns to persuade executives and stakeholders in your organization to support a decision. Use this section to create a game plan to align company priorities and make your dream of automation a reality.

Do you and your department have credibility?

The first step is a situational assessment of your standing in your organization. Does your role have responsibility for process improvement? Do you have the trust of the organization to make investments? Do you have the authority to sign agreements? If not, who do you need to go to get approval? If you haven't had the experience of buying a software platform before in your organization, interview someone who has been successful in acquiring tools in your organization.

Determine management objectives

Discover the objectives of your executive team and management. Are they more concerned with top-line revenue growth or bottom-line cost reduction? Look at any company-wide communications that outline the priorities for your organization. A little bit of reading can help you formulate smart discovery question before meeting with executives.

Create a financial case that aligns with management objectives

Before meeting with executives, understand how an investment in a GAP aligns with management objective on a qualitative and quantitative basis. Create a high-level spreadsheet that estimates the project ROI
and levers.

Ask discovery questions that uncover interests and objections

Before going into "hard sell" mode, uncover the interests of your stakeholders. Ask them smart discovery questions that will show what a successful project could look like. Also, understand if there are any hot-button issues that could derail your investment in a General Automation Platform.

Offer proof-points

Use case studies, analyst research, and other proof to bolster your business case for investment. Doing so will boost the confidence that your executives will have about you and the proposal. Give them a reason to believe.

Have a roll-out plan ready

Be prepared for success. Create a project timeline with milestones. Outline resources required.

How to position General Automation Platforms for each executive

Role	Chief Concerns	Align Interests
CMO	• Grow pipeline cost effectively • Drive alignment with sales • Provide a world-class and consistent customer experience	• GAPs are proven to improve revenue pipeline metrics. • Integrating and automating the processes running between the sales and marketing organization we'll get both teams working on the same page and with full transparency. • Automating the messaging along each step of the customer journey will improve the customer experience.
VP Sales	• Hit revenue targets • Provide an accurate forecast • Empower the sales team	• GAPs, through customized lead scoring, can surface hot opportunities that have a higher likelihood of closing. • By bringing together more deal signals, GAPs can improve forecast accuracy. • Sales team members often want to try new sales enablement tools. A GAP can make it easy to try new tools and integrate them into your standard sales processes
CIO	• Enable the business with tools and technology • Manage risk and security • Control costs	• GAPs are a great investment to enable your business counterparts because they can own and manage a solution that will help them run their business themselves. • GAPs, because they provide a central point to automate processes, are better at managing data access than point-to-point native integrations that obfuscates who has access to what. • Because GAPs are typically priced on successful workflows rather than access to connectors, there is much less chance of shelfware.
CFO	• Empower the business to make smart financial decisions • Control of sensitive financial information • Managing the business to hit financial targets.	• GAPs can automate in the movement of financial data to various departments which will empower them to make smarter decisions. • You can specify the amount of access that any person or process has of financial information. • GAPs can provide real-time data on a wide variety of signals that are leading indicators on the financial health of the business.
CEO	• Attract and retain talent • Innovate and outmaneuver the competition. • Align the organization • Deliver return on investment to shareholders	• Talent is attracted to companies that use leading-edge technology like GAPs because they can gain valuable skills. • GAPs provide a competitive advantage regarding inventing new and more efficient processes. • GAPS increase the visibility of results and tasks to the benefits of automation. • An investment in a General Automation Platform often lifts all boats and improves the ROI of investments in teams and technology.

Overcoming Objections

Here are recommendations on overcoming typical objections to moving forward with a General Automation Platform.

Objection	Handle
We have to implement software X first, before starting this project.	It's possible that a General Automation Platform can help you be more successful transitioning to a new software. Often, you'll need to integrate that shiny new application into your stack. And if you need to integrate, a GAP can help you move data into new apps and out of old ones.
We have to implement software X first, before starting this project.	It's possible that a General Automation Platform can help you be more successful transitioning to a new software. Often, you'll need to integrate that shiny new application into your stack. And if you need to integrate, a GAP can help you move data into new apps and out of old ones.
We don't have the bandwidth to manage another application.	GAPs are easy to manage because of their intuitive drag-and-drop interface. That said, your vendor may offer managed services to configure and administer your instance as a way to offload the work.
We don't have the budget to move forward.	Use your ROI estimate to show how the investment will pay for itself over a calculated payback period.
Our CTO thinks he can build this in-house.	Don't underestimate the time and resource it can take to develop sophisticated integration and automation software from scratch. The time to value will be significantly longer than using a ready to go GAP. Also, there will be maintenance and upgrades requiring ongoing resources. Wouldn't your scarce resources be better applied to core competencies like building up your product and services?

Part six: Becoming successful with general automation platforms

Now that you've proven the ROI and made a decision to move forward with a GAP it's time to start planning for success. Create a plan to ensure a smooth roll-out of your new general automation platform. Make sure that your project includes these key components:

- Workflows identified
- People
- Alignment
- Metrics
- Quick wins
- Build on success

Workflows identified

Make sure that you have one more specific workflows selected to automate. While General Automation Platforms are very flexible and can do almost anything, you'll want to make sure that you focus on concrete outcomes.

People

Select someone to administer you GAP. While GAPs don't require a computer science degree, it's helpful to pick someone who thinks about processes logically and can break them into steps. If you have experience using spreadsheet formulas and functions you're likely a good candidate to manage a GAP.

Also, identify if you'll need to work with any other application administrators. For example, if the process that you are automating touches your marketing automation platform and CRM, you'll likely want to involve the administrators of the applications. They'll be able to point out key fields that you may need to use and also grant API access to the tools that they manage.

Alignment

Make sure that everyone involved in a process is on-board with the changes that you'd like to make. No one likes to get surprised on a process change.

Measure metrics

Make sure you define and communicate the metrics that you'll be tracking. Knowing this will align everyone to what success will look like.

Quick wins

You might want first to tackle the gnarliest process. We think it's lower risk to start automating less complex processes early so that you and your organization gain confidence in the platform and your skills to automate. Once you've gotten the hang of it, then try automating more complex processes.

Build on success

Once that you've gotten a series of quick wins on the board, now is the fun part. Start looking for more processes that lend themselves to automation. You could be the automation superhero that comes to the rescue of other teammates or departments.

Case Study: VOX MEDIA

Vox Media Connects and Automates Pre- and Post-Sales to Streamline Workflow

Improves efficiency, transparency, and cross-team collaboration by integrating Asana, Salesforce, and Gmail

Industry: Media

Location: New York, New York

Solution: Tray.io Sales and Marketing Cloud

Highlights:

- Integrated three disparate systems (Salesforce, Asana and Gmail) to eliminate duplicative, manual processes and automate information flow across systems
- Reduced project creation lag time **20X**
- Improved transparency and collaboration across sales and design teams

What does it take to build a digital empire in today's rapidly evolving media landscape? It takes a powerhouse house of brands that serve up more than 1 billion content views each month to content-hungry audiences.

The owner of that house of brands is Vox Media. The company's eight editorial brands serve up everything from sports coverage on SB Nation to gaming news on Polygon, politics on Vox to the latest shopping trends on Racked. It's a modern media success story.

Challenge: Connect pre- and post-sales for greater transparency

Vox Media's sales team relies on Salesforce to manage leads and customers throughout the sales process. The revenue support teams needed a way to streamline the tracking and managing of advertising projects, including proposals for sales opportunities, onboarding of new clients, and ongoing management of campaigns. The team selected Asana and soon looked for a way to link it with Salesforce.

According to Mike Atwood, Executive Director of Client Success at Vox Media, the company first began by manually re-entering data from Salesforce into Asana. A member of the sales team would add data into Salesforce about an upcoming opportunity and then summarize the data and send it to an email alias for the rest of the team. A member of the revenue support team would then create a new Asana card and copy and paste the opportunity information into this new project.

"It was a very inefficient process that lacked transparency across our teams," says Atwood. "Plus, it added an unnecessary layer of complexity to everyone's jobs." Atwood knew that the integration between the two systems needed to be automated so the company quickly chose an off-the-shelf, self-managed integration tool to solve the problem. However, when that tool failed to handle the volume and complexity of Vox Media's requirements, Atwood had to pursue a better solution.

Solution: Integrate and automate Salesforce and Asana with Tray.io

Atwood quickly began soliciting recommendations for alternatives and was referred to Tray.io by a trusted partner. "From the very beginning, I felt that we were in good hands with Tray.io," says Atwood. "The personalized service and attention to detail really sold us on the solution."

Once the decision was made, the initial integration of the three, disparate systems (Salesforce, Asana and Google Gmail) happened in a matter of weeks. Now Tray is being used to import opportunity data from Salesforce into Asana in real time, a twentyfold reduction in project creation lag time compared to the prior integration vendor. Then Tray automatically assigns users to tasks within the project and assigns due dates, eliminating several duplicative, manual steps to streamline the workflow.

To create even greater transparency across teams, Vox Media uses Tray to update status fields in Asana automatically as they are updated in Salesforce. "Before Tray, status information was only available in Salesforce to the sales team," says Atwood. "If a deal was closed-lost or closed-won, the rest of the team didn't always get notified." Now with the Tray integration, everyone on the project is automatically alerted via Gmail when the status changes and the status updates are reflected in Asana.

Results: Increase transparency, collaboration, sharing, and efficiency

While it's still early days in the Tray integration of Vox Media's backend CRM and project management systems, the pre-and post-sales teams are already seeing the benefits. "Tray enables better cross-team collaboration, easier sharing of data in real time, increased integration stability, and transparency across the client lifecycle," says Atwood.

Ultimately by streamlining and automating steps within the pre-sale and post-sale workflow, Vox Media is hoping to shift team attention away from process and onto more important business goals of increasing close rates and ensuring positive customer experiences to meet account growth and client retention goals.

Next up for Atwood and his team is to go deeper into the integration and automation capabilities within Tray to automate even more of the end-to-end workflow. And he can count on Tray to help uncover new opportunities for automation. Adds Atwood, "The support we get from Tray is amazing. With Tray, we have a group of experts who can help us explore all the possibilities we haven't even thought of yet."

> Tray enables better cross-team collaboration, easier sharing of data in real time, and transparency across the client lifecycle.

Mike Atwood,
Executive Director of Client Success

Part seven: Buying general automation platforms

Not all General Automation Platforms are created equal. Here's advice on selecting the right solution for you. Our recommended purchase process:

Step #1 Document your project goals
Writing down your goals will focus your attention on the details that matter. It will also help you communicate the goals to your stakeholders. Include a list of qualitative and quantitative metrics that you are looking to achieve.

Step #2 Create a timeline of milestones
Jot down your ideal sequence of events from the vendor selection process to configuration, go live and first value. This practice will keep you moving forward at a deliberate pace and help you from getting bogged down in the minutia.

Step #3 Define your requirements
Think broader than just feature requirements. How vital are more general concepts like usability, flexibility, and scalability? Consider support and training requirements. Consider the security, compliance, resilience requirements that your IT policies will mandate. Also, consider the responsiveness of the vendor to enhancement requests. You don't want to be beholden to a slow to respond vendor.

Step #4 Identify your stakeholders
Make sure that you involve your economic decision-maker in the decision process. You wouldn't want to spring it on her to sign off on a significant investment. Make sure that you identify anyone that has the potential to block the agreement and make sure they are on-board early in the process. Finally, define up-front with your stakeholders how you intend to run the process and make a decision.

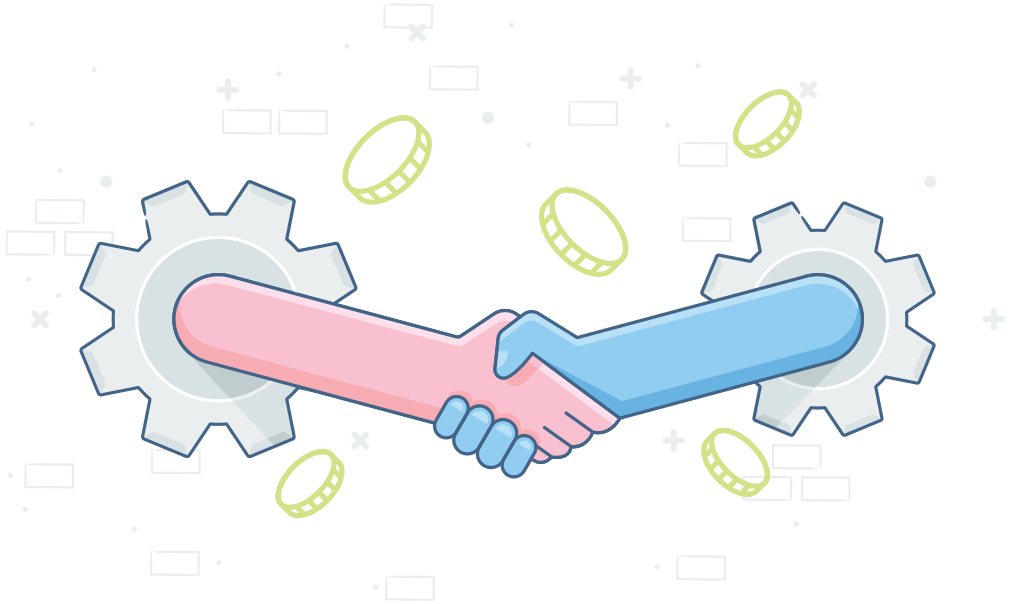
Step #5 Evaluate vendors against your requirements
Create a vendor long-list by researching product comparison sites, asking friends or reaching articles. Whittle down this long-list to a short-list of two to four vendors. Engage your shortlist vendors and schedule demos, trials or a proof of concept. Make sure that vendors can support your current requirements but also have the flexibility to support your future needs.

Step #6 Talk to references
Ask your finalist vendors for references of customers that have similar needs to yourself. Interview those references for technical and non-technical factors. Understand how the vendor delivered success overall.

Step #7 Make a decision
You've compared capabilities, evaluated ROI, and assessed the value-added services of vendors. Now it's time to bring it all together and choose the vendor that will help you to be the most successful.

Step #8 Get started
Now you can roll-up your sleeves and dive into the exciting world of automation. Get access to the APIs that you'll need for your process. Either start building workflows yourself or ask for configuration assistance from your vendor. Once you have your first workflow made, be sure to validate the results. Once it's validated, you can set it and forget it and move onto your next automation.

Step #9 Iterate and improve
General Automation Platforms, like most software, has a learning curve. The chances are that you'll think of new and better ways to accomplish and automation in six months from now. You might want to go back and tinker with older workflows to make them more comprehensive. Subscribe to a vendors blog to stay abreast of new product enhancements as well as new ideas that can inspire you to make greater use of your GAP.



Additional factors

Remember to evaluate vendors for more than features and functions. Much of your success will depend on other factors such as:

Is support by a human available?

Do they offer configuration consulting?

What kind of documentation and training is available?

How responsive is the vendor to questions and requests?

Case Study: Northwell Health

Northwell Health Automates Event Management Workflow for Outreach Program

Improves efficiency, accuracy and collaboration by using Tray to integrate Google Forms with Asana

Industry: Healthcare

Location: New Hyde Park, New Yorkk

Employees: 65,000

Solution: Tray.io

Highlights:

- Automatically creates projects and tasks in Asana from event data submitted via Google Forms
- Populates fields in Asana for the appropriate hospital from Google Forms data
- Improves efficiency, communication and collaboration

As New York state's largest healthcare provider and private employer, Northwell Health serves more than two million people annually in the New York metro area and beyond. The depth and breadth of its services extend beyond its 22 hospitals, 550 outpatient facilities and nearly 15,000 affiliated physicians and into the community itself.

Challenge: Streamline the management of community outreach efforts

Contributing $1 billion back to the community every year takes a great deal of work. Responsibility for coordinating, managing and reporting on that effort resides with the community relations department at Northwell. "We manage more than 5,000 community events and programs each year," says Matthew DePace, regional director of corporate community relations manager at Northwell Health. "And we used to do it all by hand using email."

Shortly after joining the community relations department, DePace set out to automate the event planning and management function, creating a centralized location for all event data, both past and present. After evaluating off-the-shelf project management tools, Northwell Health chose Asana to manage events and tasks and improve collaboration and communication around events.

While Asana provided a centralized way to manage events, the effort to get event information into Asana was still manual. DePace decided that there had to be a way to automate getting the data on each approved event from a Google Form into Asana. "We were manually taking the data such as who was going where, who was speaking, which materials were needed, and more and entering that data into Asana," says DePace. "It wasn't a very efficient way of handling it."

Solution: Integrate Google Forms with Asana using Tray.io

After searching for the right solution to the integration problem, DePace found Tray.io, the automation platform for integrating any process and automating any event, and an Asana global strategic partner. He was impressed by both the technology and the customer service Tray delivered. “Tray is very innovative and the solution makes processes like ours truly flow automatically,” says DePace. “Tray makes the business behind the business work.”

In short order, the Tray solution was deployed at Northwell Health to integrate Google Forms and Asana. “It worked seamlessly on day one,” says DePace. “Tray automates the creation of projects and tasks in Asana based on the data in Google Forms.”

Originally, the new event management workflow was used for the eastern region community relations staff. More recently, the department became a corporate function, responsible for coordinating events for the entire Northwell organization. “When we became responsible for all events, Tray helped us incorporate enhancements to support our corporate-level efforts,” says DePace. “Now we have 75 staff members using the solution to automate management of all our community outreach efforts across all of our facilities.”

Results: Improved efficiency, communication and collaboration

With its event management process automated, the community relations department and the hospitals it works with have all the event data, tasks and communications in one centralized location. “With Google Forms, Asana, and Tray, our team stays on track, communicates more efficiently and effectively, and can access historical data to help us understand how best to support an event,” says DePace. “It’s definitely streamlined and improved our process.”

With the success of the first integration under his belt, DePace is looking forward to continuing to use Tray to automate workflows, including the event approval process. And he knows that as the healthcare company continues to grow, that it’s easy to add new hospitals to the community relations workflow. Adds DePace: “I’m happy that we found Tray. The solution works flawlessly, the customer support is great, and the continued innovation will help us automate more in years to come.”

> With Google Forms, Asana, and Tray, our team stays on track, communicates more efficiently and effectively, and can access historical data to help us understand how best to support an event. It’s definitely streamlined and improved our process.

Matthew DePace,
Regional Director of Corporate Community Relations

Part eight: The future of general automation platforms

There are several general automation trends to look out for over the horizon. Use them to your advantage.

Trend #1: GAPs are spreading within organizations as companies mature from point-to-point integration to companywide automation.

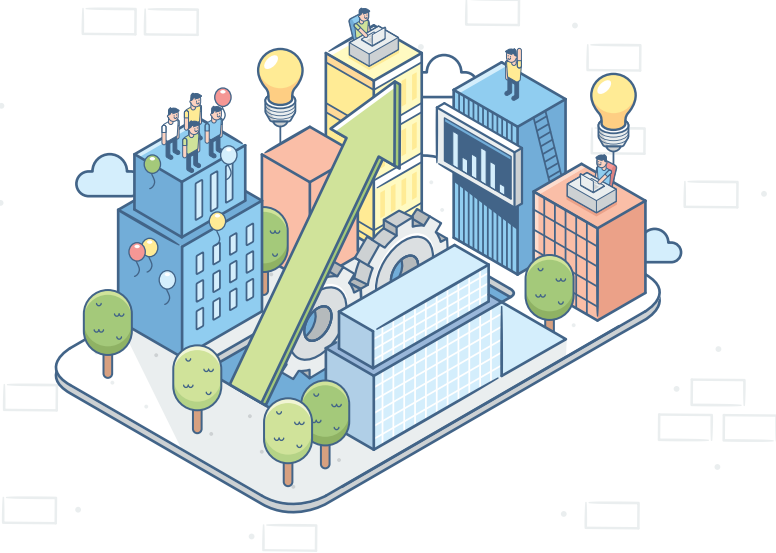
Organizations typically start-off with GAPs as a way to solve one pain point. As their understanding grows of what GAPs can do, then we see an acceleration in the number of use cases that they are used for. Before too long, we've seen companies standardize all automation on a GAP.

Trend #2: The office of the CIO are embracing GAPS as a way to empower business users.

The CIO of a Fortune 100 pharmaceutical company remarked that he needed a way to handle the growing volume of integration and automation requests originating from business users. He realizes that his IT team isn't big enough to deliver on all the demands and that the tools used in IT are too technical and not appropriate for use by business users.

Trend #3: GAPs have the potential to replace one-trick-pony software.

With the explosion of single-use case software over the last five years. Former buyers realize that they have too many applications and are looking for ways to replace multiple software with one broader, or more generalized software that can accomplish many use cases. For example, GAP users have successfully replaced lead scoring software, marketing automation software, lead-to-account matching software, and multiple point-to-point integration software.



Part nine: Tray's general automation platform

Why Tray.io?

The right combination of a flexible and powerful platform

Easy. Quickly build integrations using an easy-to-use drag-and-drop interface.

Flexible. Easily map and transform data to multiple applications without writing any code.

Powerful. Construct complex workflows including conditional branching, looping and storing data.

Never outgrow your GAP

With Tray, you can start simple and then scale-up your processes. We support start-ups and vast Fortune 100 organizations.

Enterprise-grade

Tray offers all the scalability and security required by some of the most demanding organizations in the world.

Customer success included

With Tray.io you don't just get access to a great platform. You get a team of experts that you can call.

Conclusion

So that is it: everything that you would want to know about General Automation Platforms. Whether you are a fast-growing startup or a well-established enterprise, General Automation Platforms are a great way to equip citizen automates with a smart way to achieve superior growth.

This topic is evolving quickly so we'd encourage you to subscribe to the Tray.io blog to keep-up-to-date.

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