



How Workato began booking 60% of sales meetings via phone conversations

Workato is an integration and automation platform, widely recognized as an industry leader. Workato enables both business and IT teams to integrate their apps and automate business workflows without compromising security and governance, and has raised \$415 million to date to tackle the mission.

“ Thanks to Orum, we've been able to double quarter after quarter and 60% of our meetings are coming from cold calling. ”

The Workato sales team is focused on engaging dynamic companies looking to transform their business — typically mid-market and enterprise companies. The team, made up of 80+ SDRs around the globe, works as a pipeline driver to help Workato achieve its top-line revenue. It plays another critical role, as well — it is also the primary talent pipeline for the company.

The COVID-19 pandemic changed the way business is transacted. With email inboxes getting flooded, the sales team at Workato was having more success reaching prospects through cold calling. Not only was phone outreach resulting in more meetings, it was also helping the team develop stronger relationships with prospects instantly. To invest in its strengths and increase efficiency, the team sought out a AI live conversation platform and landed on Orum.

Today, 60% of all sales meetings at Workato are booked via cold call. Since adopting Orum, Workato has seen a 2x increase in meetings via cold call.

Challenge

Effectiveness of phone conversations during the COVID-19 pandemic

Cody Tse, Director of Sales Development, came to Workato when the company only had four sales reps. He was excited about building out the team. But when the COVID-19 pandemic hit, Cody and his team recognized that traditional methods of email outreach were not driving the results the team needed.

Spotlight on Workato

\$5.7B

Valuation

60%

Of all meetings booked via cold call

80+

SDRs globally



Cody Tse
Director of Sales
Development



“During the pandemic, inboxes were getting flooded. We were trying all different kinds of emails, but not a lot of our efforts generated replies from prospects” said Cody. The team began using phone conversations as a strategic part of their sales approach and found that it was a fruitful way to book more meetings.

“ Other companies were afraid to pick up the phone during the turbulence of the period, but we decided to focus on cold calling because it was easier to show empathy and start a real conversation that way. ”

Soon, Cody and his team were booking over 50% of all meetings via cold call, with the rest coming from email and LinkedIn. This was a switch from pre-pandemic when roughly 65% of meetings were booked via email.

The sales team was thrilled about the success and wanted to continue to invest in connecting with prospects through phone conversations, but the team’s process was inefficient– they were dialing each prospect manually from Outreach– and they weren’t sure how they could drive more efficiency.

“ We not only saw a higher conversion rate from cold calling, but we also saw our numbers go through the roof. We were booking 2x or 3x the amount of meetings and opportunities during a challenging and uncertain time. ”

Solution

A seamless implementation & integration of an AI live conversation platform

In a previous role, Cody had seen a demo of Orum and was extremely impressed. Orum is an AI-driven live conversation platform that allows sales reps to connect with their target prospects on the phone more efficiently. The Orum team did a live demo where they actually made calls and booked meetings for Cody’s team.

“ In my demo with Orum’s team, our Sales rep booked a meeting right in front of my eyes within 10 minutes. My mind was just blown. I realized I could use Orum to speak to a ton of different people with all the information I needed about my contacts from Outreach and LinkedIn right at my fingertips. ”

When the sales team wanted to utilize phone conversations at Workato, Cody remembered how powerful Orum was. He also tried a demo from the competitor but found the product clunky in comparison.

After an internal ROI analysis, the team decided to move forward with implementation. Cody reports that the



implementation was seamless and that Orum worked well with Outreach and Salesforce. Soon, the reps were using Orum to connect with prospects.

Results

More calls + more meetings = ARR goals reached

Now that Workato's SDRs have Orum, they've been able to successfully double down on cold calling. The dialing solution has allowed Workato to increase efficiency, have more conversations, and ultimately book more meetings.

Since implementing Orum, Workato has increased meetings via cold call by 2x and are now booking 60% of all sales meetings via cold call.

Preparing SDRs for AE roles

Not only is the Workato team getting sales results, but the SDRs have more time to focus on other efforts.

"The reps now have more time in their day to spend on personalization, research, syncing with peers, and checking in with account executives about target accounts," said Cody. These are the skills that prepare SDRs to be ready to be in closing roles like an Account Executive, which is essential as these SDRs are an integral part of Workato's talent pipeline.

Some reps are using that extra time for call blitzes as well. "Before Orum, we might have one call blitz. Now, we have teams doing three or four call blitzes and seeing results there, as well."

Cody is confident that Orum would have the same results for others. He's recommended Orum to several sales development leaders and has two that are currently evaluating the tool.

Spotlight on Results

2x

Increase in meetings via cold call

60%

Of overall sales meetings booked via cold call

“ Anyone considering Orum should absolutely give it a try. Do a pilot, create an ROI analysis for your use case, then use Orum to help drive pipeline. ”