



# HOW GONG INSIGHTS HELPED WORKATO PIVOT DURING COVID-19 AND HIT 102% OF PLAN

## THE CHALLENGE

Workato's reliance on anecdotal data made it a challenge to effectively and accurately track demand generation, ultimately restricting their visibility into the full funnel.

## THE OUTCOME

Thanks to Gong, Workato has become even more of a data-driven sales and marketing organization that no longer relies on anecdotes. Gong insights allow the team to make much more strategic decisions based on data.

Workato is *the* single platform to integrate anything and automate everything. It is an Enterprise Automation platform that enables both business and IT to drive business outcomes by listening to and taking actions on business events.

As a company in hypergrowth, Workato knew it was time to stop relying on anecdotal data. And, as Bhaskar Roy, Head of Growth and Marketing at Workato, wisely stated, "You can't make practical changes based on anecdotal data."






Before Gong, the truth always lived somewhere between "one sales rep said this; another said that."

*It became a real challenge to effectively — and accurately — track demand generation and see the full funnel.*

This uncertainty didn't sit well with Bhaskar, whose marketing team is driven by the number of opportunities it generates.

**Note:** While all Marketing and Sales teams — in theory — work hand-in-hand, Bhaskar believes the two teams at Workato are uniquely aligned because a core marketing metric, the data point everyone on his team is working towards, is "how much they are adding to the pipeline." This, in Bhaskar's words, is what creates "a true partnership."

The team was ready for a change.

 Headquarters Mountain View, CA	 Website <a href="http://www.workato.com">www.workato.com</a>
 Founded 2013	 Industry Automation Software
 Company Size 250+	

## GONG. GONG. GONG.

You guessed it: that change was Gong.

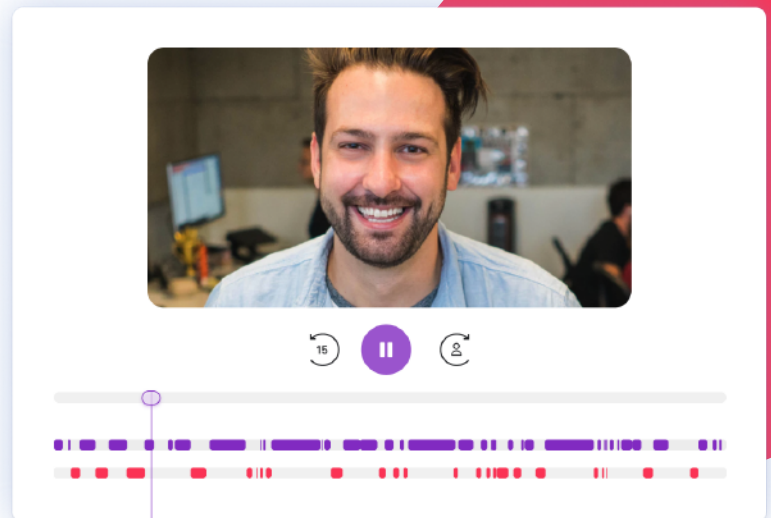
The Sales team at Workato was growing at a very rapid pace — a 3-4x rate for the past few years. The VP of Sales was looking for a way to scale the team in a consistent way while providing top-notch training and guidance.

And so began the sales evaluation process.

While the team reviewed several vendors, it took a mere matter of weeks to realize Gong was the best choice. The deal-sealer: all trusted friends in the sales/sales ops space spoke very highly of Gong.

The Workato Sales team didn't waste any time implementing Gong. And similar to what happens with most Gong customers, it didn't take long for the "Gong secret" to get out to other parts of the organization, specifically Bhaskar's Growth and Marketing team.

*"We'd come across various call snippets. **My immediate reaction was, 'Wow. This is incredible information.'** The ability to see how our customers are reacting to our messaging in real-time is incredible. There is nothing like getting that first-hand view about how customers are perceiving what we are putting out there."*



Bhaskar was hooked and he dove right in.

And then, COVID-19.

## HOW GONG HELPED WORKATO ADJUST SALES OUTREACH STRATEGY DURING COVID-19

COVID-19, the global pandemic, changed everything. B2B companies — specifically sales and marketing teams — have not escaped the challenges presented by a world completely upended.

Skyrocketing unemployment, economic uncertainty, reduced budgets, and a workforce that has dramatically shifted from in-office to work-from-home have put a strain on sales and marketing teams everywhere.

Bhaskar and Workato were up for the challenge. And Gong proved to be the perfect tool to help bubble up the data that ultimately led to two hard pivots.

## PIVOT #1

It started with trackers in Gong.

Bhaskar and his team plugged in “budget” and “timing” to better understand the frequency and timing of when these two keywords were popping up in sales conversations. It was not necessarily that they were occurring more frequently. Instead, the insight came from when they were hearing them.

*What Workato learned from the Gong data changed the content and tone of all first meeting conversations.*

From February through April of 2020, Gong’s tracker showed that mentions of both “budget” and “timing” (and their related terms) on the first call were steadily increasing.

They interpreted these data to mean that, during the first meeting call, “budget” and “timing” are top of mind for prospects. This newfound information led the team to proactively dig into both budget and timing on the first call instead of later on during the sales process.

Additionally, since budget and timing were being discussed much earlier in the sales process, it was determined that other changes needed to happen to keep prospects motivated to keep the conversation moving forward. The Sales team began offering flexible payment terms, turnkey “go live” solutions, and made it a point to highlight its fair use policy... all on the first call.

### TRACKER USE

Percentage of 789 calls

Discovery Questions

83%

Budget

74%

Timing

67%

Competitors

33%

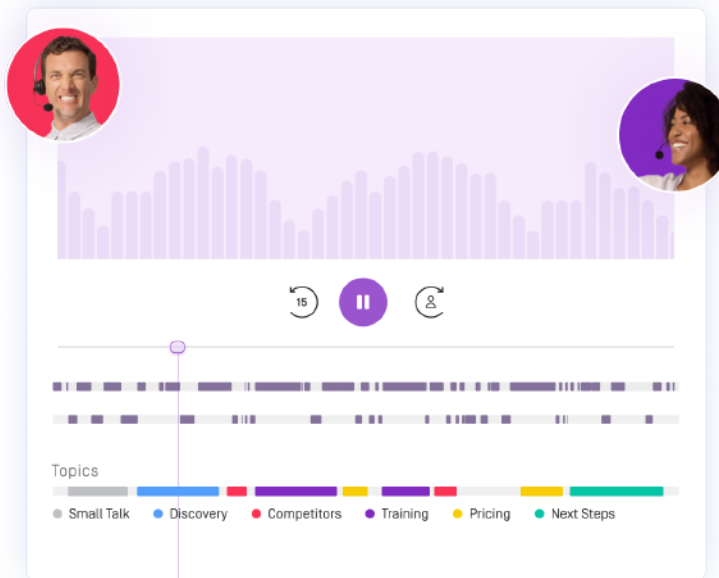
## PIVOT #2

Workato’s typical outbound sequence combines a mix of email + phone call + LinkedIn.

In February 2020, email consumed the majority of the effort (57%), while LinkedIn (29%) and phone calls (14%) rounded out the remainder of the outbound pie.

However, as the Workato team dug into the data, they realized that more meetings were getting booked via calls compared to email or LinkedIn messages. Data > assumptions — so the Sales Development (SDR) team completely flipped the outbound sequence mix in April — 58% phone calls (vs. 14% in February), 25% email (vs. 57%), and 16% LinkedIn (vs. 29%).

An unintended, yet highly useful, side benefit of the shift to more calls? More Gong recordings. And more Gong recordings meant more opportunity to analyze the data and further optimize the sales and marketing process.



Thanks to Gong data and these two quick pivots by Bhaskar and his team, Workato was able to achieve a whopping 102% of its pre-COVID plan. When adjusted for COVID, they hit 152% of the plan!

**BONUS:** “We also achieved a 3.7x pipeline coverage for Q3. For reference,” Bhaskar shared, “our goal is normally around 3x.” To hit that number — during COVID — surprised even me.”

## MARKET INTELLIGENCE: GONG CALL RECORDINGS + SLACK NOTIFICATIONS = IMPROVED WIN RATES

The three pillars of Gong’s Revenue Intelligence platform are:

- 1 **Deal Intelligence:** Understand which deals are real, discover deal risks, and identify churn signals before it’s too late. Coach your team to more successful closes and make every dollar in your pipeline count.
- 2 **People Intelligence:** See which reps are thriving and which reps are struggling with remote selling. AI-coaching recommendations help you pinpoint your coaching efforts on the reps that need it most.
- 3 **Market Intelligence:** Know what is truly going on in your market, so your GTM strategy and messaging always hit the mark, be the first to know about shifting sentiment in your accounts and your market.

Additionally, Market Intelligence helps Gong customers “hear the unfiltered voice” of its market, ultimately enabling the rollout of new initiatives. This can manifest itself in a few ways:

- What is the market saying?
- What are sales reps saying?
- How are prospects or customers talking about our competitors?

*For Workato, Market Intelligence helped the team better understand how prospects were talking about its competitors.*

In order for the Market Intelligence to be useful and visible, it was important to Workato to surface this intelligence in Slack and make sure it made its way back into Salesforce. This allows the entire company, not just the sales team, to benefit from Gong insights.

To do this, the team set up a Slack channel called #competitive. Using Workato's own platform, they created an automation recipe that listens to Gong for whenever a prospect mentioned a key competitor on a call, which triggered a new alert in the #competitors channel. This alert is delivered by [Workbot](#) - a bot platform for Slack, Microsoft Teams, and Facebook Workplace.

However...

Rather than just a "hey, this happened" alert, Workato took it a few steps further to make the alert truly actionable:

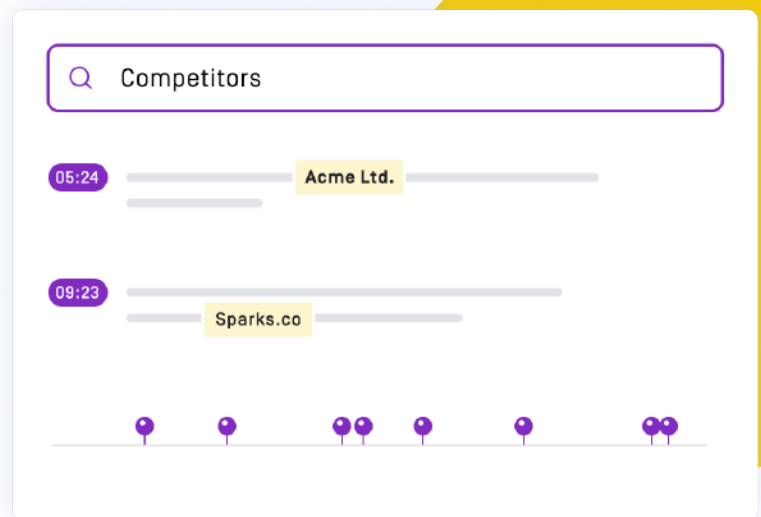
- First, the team made the alert visible to not just the sales rep, but the entire account team. *Nothing to hide, full visibility.*
- Next, they had Workbot identify the specific competitor mentioned, and intelligently add a link to the specific "Battle Card" so the rep could be armed with how best to respond. *Talking points front and center. No searching. No excuses to not use.*
- **Then, Workbot scanned Salesforce to see which rep(s) had won against this competitor in the past so they could help the current rep win the deal. #TeamworkMakesTheDreamWork**
- Finally, Workbot automatically updated Salesforce with all of this competitive data. *Let's be honest, sales reps don't always take the time to update CRM records.*

Per Bhaskar, Gong and Workbot "helped us improve our overall win rates just by bringing this critical competitive information from Gong-recorded calls, surfacing it to a number of people, and making it actionable from there."

Win. Win. Win.

*The net result: A higher than anticipated win rate.*

However, in order to properly track win rates, a reliable tracking mechanism needed to be in place for funnel reporting.



## RELIABLE TRACKING FOR FUNNEL REPORTING

As previously mentioned, the entire marketing team at Workato is driven by the number of opportunities it generates.

When Workato's Marketing and Growth team looks at the entire funnel, they ask a series of key questions:

- 1 Did we set up a meeting?
- 2 If yes, did the meeting actually happen?
- 3 If yes, did this meeting result in a qualified opportunity?

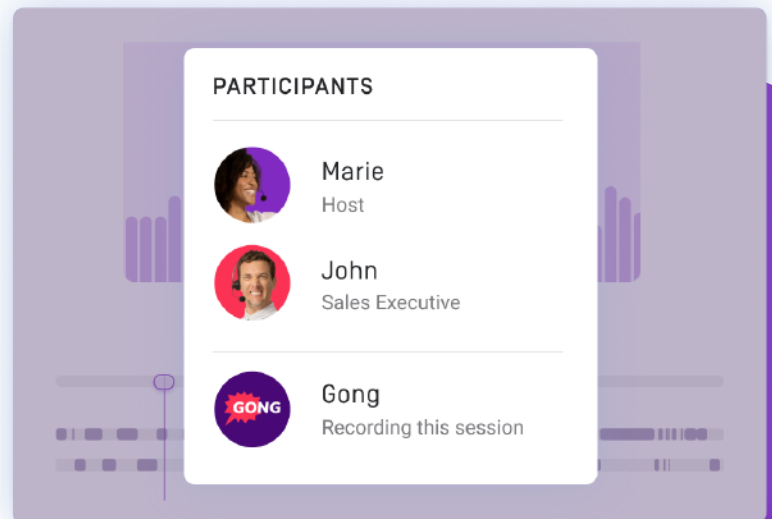
Prior to Gong, Workato was wholly reliant on each sales rep inputting the "meeting attended" date into its CRM. And, well, often that data would not exist.

Not good.

Using the Gong/Salesforce integration, the team is now able to answer [a] was there a Gong call associated with an opportunity?, [b] if yes, who participated in the call other than the sales rep and the prospect?, and [c] was the call meaningful — as denoted by a call duration of 15+ minutes?

Based on the above, the integration automatically populates the "meeting attended" date.

"All of a sudden, we now have a full view of the funnel — not just that the lead was generated but also did the meeting with the sales rep actually take place? After the meeting, how many leads turned into real opportunities? What were the drop-offs?"



*These data have led to a much more reliable funnel report and have proven to be invaluable as Workato continues to hone its sales-marketing partnership.*

Bhaskar: "Gong recorder is now our 'proof' that a call actually took place. Prior to Gong, we had to rely on sales reps to tell\* us the call happened."

*\*tell = an updated CRM record (which, as mentioned previously, was spotty at best).*

## WHAT'S NEXT IN THE WORKATO-GONG RELATIONSHIP

*"Gong is an invaluable tool for us," says Bhaskar. "Our team just cannot live without it."*



To get all the insights and data so we can pivot and make changes is key."

Bhaskar sees the relationship between Workato and Gong continuing to grow over the coming months and years (and decades?).

"I'm just thrilled we no longer need to rely on anecdotes. Gong allows us to analyze the data, listen to the calls, and "see the emotions" on the other end of the phone. This helps us make much more strategic decisions based on these data."

Thanks to Gong, Workato is even more of a truly data-driven sales and marketing organization.

## GET STARTED TODAY

See how Workato uses Gong.io to achieve these results.  
Request your demo today.

See it live

