Workato AI Co-Pilot

Problem Statement

With the growing demand for streamlined and intelligent automation in business processes **Workato** has decided to collaborate with **OpenAI** to bring the power of generative AI into its existing models. In this way, customers will accelerate their automation journeys, and easily use AI for building intelligent products and services. This model is called **Workato Co-Pilot.**

Let me introduce Workato and OpenAI to you - Workato is a powerful integration platform that allows seamless connectivity between various applications and systems. OpenAI, on the other hand, is a cutting-edge artificial intelligence technology that provides advanced language processing capabilities.

Below are a few examples of models Workato has identified to integrate into its platform based on specific customer use cases. All these features are powered by large language models (LLMs) and are trained with proprietary data from the public Workato community.

1. **Custom Onboarding Co-pilot**
2. **Recipe Builder and Connectors Co-pilot**
3. **SDK Co-pilot**

This integration of Workato with OpenAI's Co-pilot enables organizations to advance their digital transformation drives, optimising and streamlining operations in previously unreachable ways, enhancing productivity, and fostering a higher level of automation across various tasks. However, as with any AI-powered tool, users are encouraged to carefully review all automated suggestions before their final implementation to ensure accuracy and efficacy.

Technical Details and Implementation of solution
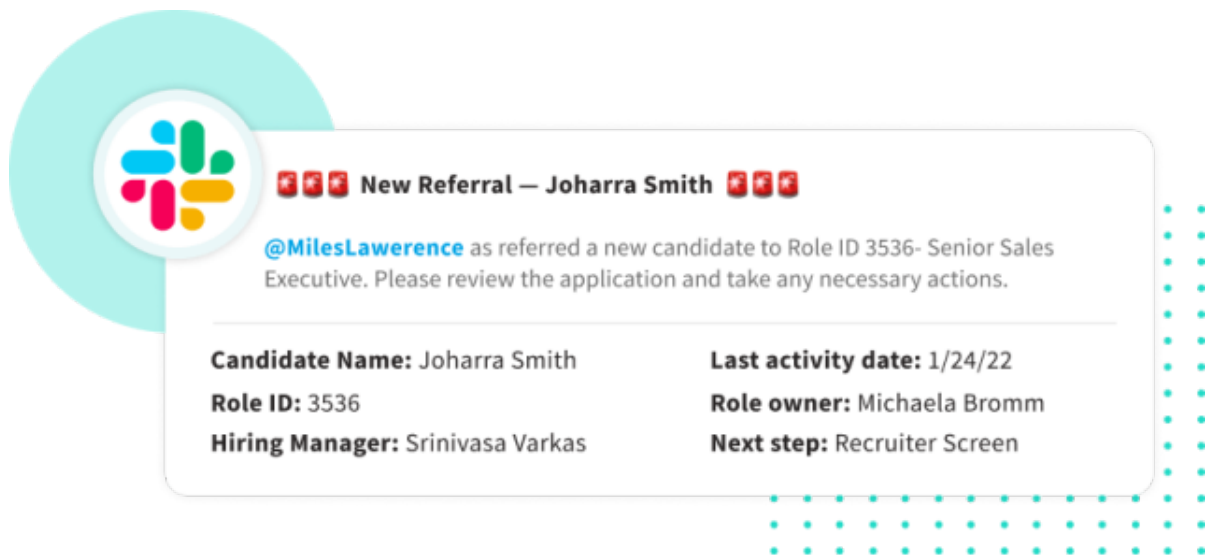
1. **Custom Onboarding Co-pilot**

   The integration of OpenAI's Co-pilot with Workato could be seen in the realm of AI@Work platform designed by Workato. The Copilot here provides assistance to the users while building their automations in natural language. It's a step-by-step guide similar to what we see with OpenAI Copilot guiding developers in writing the code. Here, the user describes the automation to be built, receives recipe outline from Copilot and then confirms or modifies it. Then the connection is confirmed for each app involved in the recipe, and finally, the Copilot generates the recipe. The user has the flexibility to review and accept (or modify) the steps in the recipe.

   Workato Onboarding Copilot would be a robust and comprehensive onboarding solution designed to streamline and automate the entire onboarding process.

By integrating Workato collaboration tools with OpenAI co-pilot, HR teams can facilitate seamless communication and coordination between different departments involved in the onboarding process. For example, when a new hire is added to the applicant tracking system, Workato can automatically create a task in a project management tool, assigning responsibilities to team members across different departments. This promotes collaboration and ensures that everyone is aware of their roles and responsibilities during the onboarding process.

Features of **Custom Onboarding Co-pilot**
- It helps HR teams and managers to efficiently onboard new hires, ensuring a smooth and hassle-free experience for both the organisation and the employee.
- It offers features such as automated email notifications, gathering employee information, configuring system access, and arranging training sessions.
- It will also provide instant troubleshooting to help new hires, learn new capabilities based on Workato data by itself, discover what to build next and offer recommendations.

🚩🚩🚩 **New Referral — Joharra Smith** 🚩🚩🚩

@MilesLawerence as referred a new candidate to Role ID 3536- Senior Sales Executive. Please review the application and take any necessary actions.

Candidate Name: Joharra Smith   **Last activity date:** 1/24/22

Role ID: 3536   **Role owner:** Michaela Bromm

Hiring Manager: Srinivasa Varkas   **Next step:** Recruiter Screen

2. Recipe Builder and Connectors Co-pilot

Called 'Recipes', Workato's workflows are used to connect apps and automate tasks in an intuitive way. These recipes are built through an interface where the user basically describes what they want to do. This could range from simple tasks like syncing new Contacts between certain apps, to something as robust as automating an entire Order-to-Cash process across your CRM, ERP, and custom apps. Workato also provides courses to give users hands-on experience with building their first recipe, understanding trigger conditions, data mapping, formula mode, managing recipe lifecycle, using Batch/Bulk processing, and tying them all using RecipeOps.

The Workato Recipe Builder Copilot is a powerful tool that assists in building and automating workflows with ease.

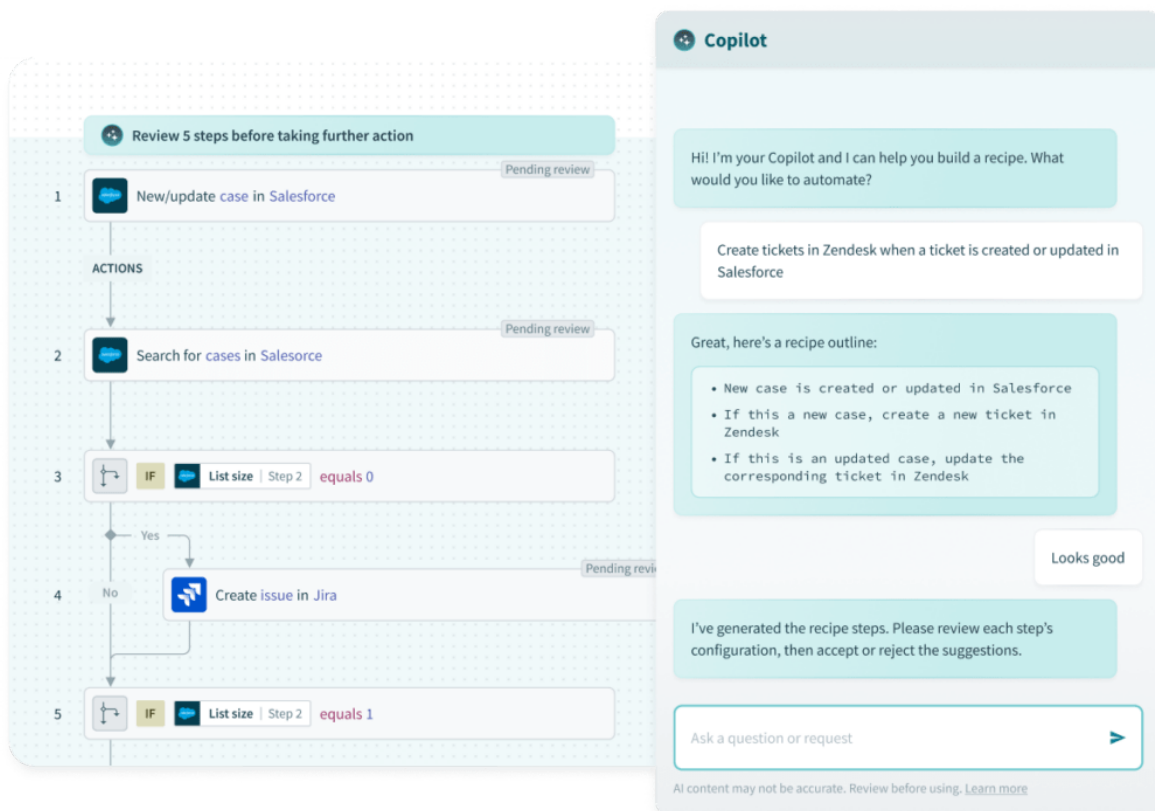Features of **Recipe Builder and Connectors Co-pilot**
- It provides a user-friendly interface that allows us to create and customise recipes without the need for coding skills.
- With the Recipe Builder Copilot, we can easily connect different applications and systems together, enabling seamless data transfer and automation. It offers a wide

range of pre-built connectors, actions, and triggers, making it simple to integrate and orchestrate processes across different platforms.

- The Copilot feature provides real-time assistance while we're building the recipes. It offers suggestions and guidance to make sure the workflows are effective and efficient. If we encounter any errors, the Copilot can help us troubleshoot them too.

Recipe Copilot works in a simple way as mentioned below.

1. A user would describe the automation they're looking to build.
2. Copilot provides a recipe outline, which the user can confirm or modify.
3. Copilot asks the user to confirm the connection for each app that's used in the recipe, which the user can do with a few clicks.
4. Copilot goes on to generate the recipe.
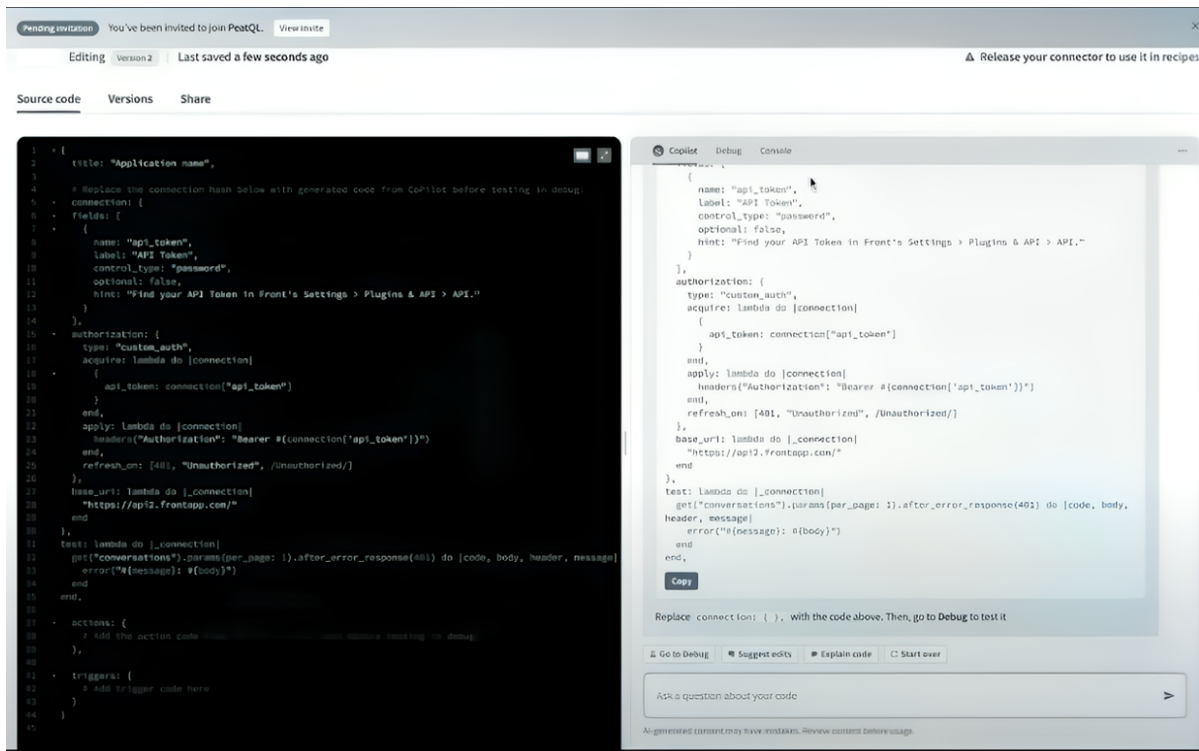5. The user can review and accept (or modify) each step in the recipe.

3. SDK Co-pilot

The Workato Connector SDK allows developers to create custom connectors to integrate with the Workato platform. This feature opens a vast range of possibilities, making it possible to create connections with systems that are not natively supported by Workato. The SDK offers a series of courses, webinars, and resources like the Connector SDK Quick Reference Guide and Workato Ruby Essentials to provide users a thorough understanding and working knowledge of the SDK.

The Workato SDK Copilot is an AI-powered assistant that helps developers quickly and easily create custom Workato integrations.

Features of **SDK Co-pilot**

- With Copilot, developers can quickly create bots that can answer questions, respond to customer inquiries, or provide automated customer support.
- Copilot also includes tools for testing and debugging bots, as well as analytics capabilities to help developers gain insights into how users interact with their bots.
- Additionally, Copilot provides an easy-to-use interface for developers to integrate their bots with other services such as Slack, Facebook Messenger, and more.

Challenges in implementing the solution

The AI must be able to interact with the user in a natural and effective way, or else the user may become frustrated or confused. Finally, the AI must be able to handle a wide variety of data types and be able to interpret and respond to the user in a meaningful way.

But based on current positive reviews about OpenAI's ChatGPT, it can be predicted that Workato's co-pilot will provide efficient automated responses to common questions and complex queries. It will be efficiently able to provide personalised recommendations and advice based on a user's preferences.

Business Benefits

- Workato OpenAI Copilots provide a range of benefits to organisations, including increased efficiency, improved accuracy, and faster turnaround times.
- By using automation, organisations can reduce manual effort and save time. This allows them to focus on other tasks, such as customer service, product development, and innovation.

- Co-pilot can improve the overall productivity of Workato developers by reducing the time spent on manual coding. It can help automate certain coding tasks, providing developers with ready-to-use code blocks and suggesting relevant functions or methods.
- OpenAI Copilots can help streamline processes by providing automated responses to customer inquiries. This can lead to increased customer satisfaction and better customer experience.
- OpenAI Copilots also offer scalability, so organisations can scale their solutions to meet their business needs.
- OpenAI Copilots are secure, ensuring that customer data is protected and confidential.
- Workato OpenAI Copilots can help users, even those without extensive coding experience, create high-quality integrations more efficiently.