

Drive Innovation with Automation

Build a unified automation strategy that
helps power AI across your organization.



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Introduction

The world is at a technological inflection point, driven by the rise of generative AI and increasing customer expectations. To avoid falling behind, organizations must connect data, systems, workflows, and experiences to help humans and AI agents collaborate seamlessly.

The excitement surrounding the potential of AI is already driving innovation strategies. Today, **93% of IT decision makers** forecast plans to implement autonomous agents within the next two years. However, **a majority of IT leaders** (62%) say they're struggling to meet increased expectations for innovation due to several roadblocks:

- Processes with too many repetitive tasks and obstacles create bottlenecks and delays
- Disconnected applications and tools that trap relevant data
- Disjointed tools, solutions, and AI deployments lead to security and governance concerns
- A lack of skilled resources hinders the ability to innovate and scale quickly

Addressing these challenges requires a multifaceted approach with **automation** as a core element.

Automation eliminates repetitive manual tasks, allowing employees to focus on higher-value activities. It also increases efficiency by streamlining workflows, connecting data and processes across departments, and ensuring that data security and compliance are built into every process. Robust automation also facilitates seamless collaboration between humans and AI agents by providing a unified data and process integration framework. This connection allows AI to take on tasks such as data analysis, initial decision-making, or task prioritization, while humans can step in for oversight, creativity, and strategic input.

Read on to learn how a robust automation strategy can empower your organization to build, implement, and interact with AI agents and apps faster and more securely than ever before.



Craft a Connected and AI-driven Automation Strategy

Automation has the ability to transform workflows, especially those involving AI agents. These agents take on tasks once managed solely by humans – like responding to customer inquiries, handling routine processes, or analyzing data – and work alongside employees to create a hybrid environment that blends human intuition with AI's speed and scale.

However, shifting to more automated processes raises important questions about data sharing, security, and responsible usage in the flow of work.

With humans and AI agents jointly handling workflows, it's critical to have a cohesive automation strategy that provides privacy, compliance, and secure access to data.

So, what's standing in the way of a cohesive approach?

Numerous Tools

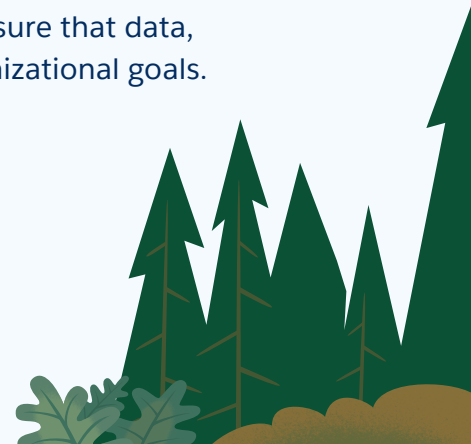
Adding automation tools without considering how they work together often leads to inefficiencies. Automated workflows will continue hitting roadblocks without an integrated platform to act as a foundation for your data, ultimately failing to save time and requiring ongoing IT maintenance. Building a **holistic platform** where all your automated processes, actions, and systems operate seamlessly across the entire IT landscape is essential to get the best results.

Disconnected Data

Much like humans, AI can only use the data it has access to. If an AI agent doesn't have the right data, its automated actions will be limited, possibly resulting in poor customer experiences. For this reason, **bringing siloed data sources together** across various teams, systems, and processes is critical to allow the right data to surface in the workflow.

Limited IT Resources

IT teams face mounting challenges including data silos, reduced budgets and headcount, a shortage of skilled workers, and growing demands from business teams to support AI initiatives. Addressing these issues requires tools that both business users and IT teams can use. **Low-code, natural language tools empower business users** with intuitive, easy-to-learn solutions, while **pro-code tools provide skilled developers** with the customization and flexibility needed for complex tasks. This collaboration enables teams to enact their automation strategies efficiently while improving governance for IT to ensure that data, processes, and systems remain secure, compliant, and aligned with organizational goals.



Critical Automation Capabilities

To tackle these challenges, it's important to focus on the key capabilities that can make automation truly effective. Let's take a closer look at the key components you'll need to build a smooth, scalable automation strategy that works across your whole organization.

End-to-End Process Orchestration

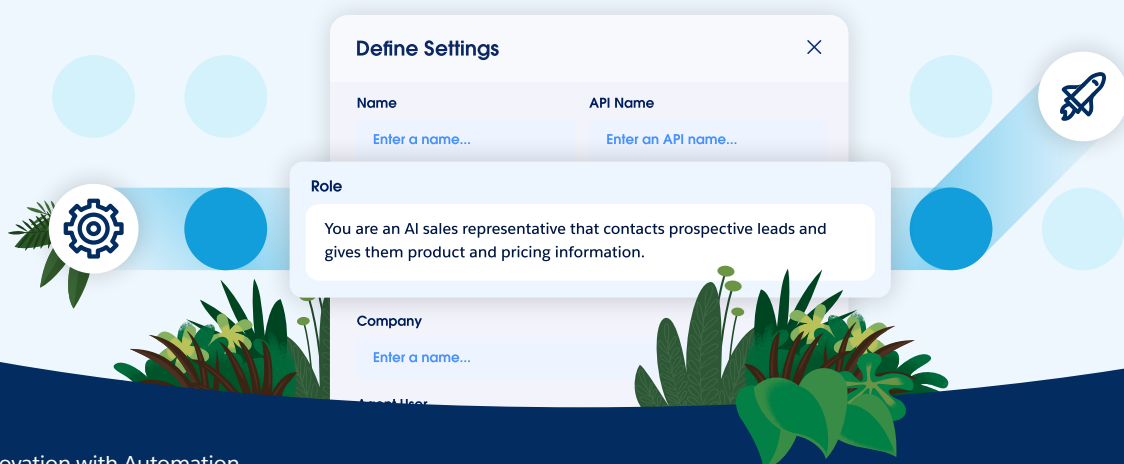
Seamless process management ensures that automation delivers consistent results across complex workflows, reducing bottlenecks and ensuring efficiency. Without it, even small inefficiencies in handoffs between steps can cascade into major disruptions. By using a holistic platform, all automation tools become connected and easy to manage and monitor, helping organizations create a cohesive system in which all parts of the process operate in harmony, reducing errors and improving overall throughput. Plus, with intelligent capabilities, AI agents can compose and orchestrate automation workflows that dynamically adapt to changes in real time.

Task Automation

Strategic task automation is about eliminating repetitive work – it's about identifying which tasks are best suited for automation and which still require human expertise. Organizations can create a balanced approach that maximizes efficiency and impact by carefully evaluating where the most time can be saved and where human attention adds the most value. Automating tedious, manual tasks frees people to focus on high-value activities where their skills shine. A well-designed strategy ensures that humans and technology work in harmony, allowing employees to reenter processes when needed, maintaining their expertise while reducing unnecessary labor.

System Integration and Connectivity

System integration and connectivity are critical to making sure automated processes work cohesively across an organization. Automation efforts risk becoming isolated without integration, leading to fragmented workflows and inconsistent outcomes. By connecting disparate systems and data sources, automation strategies gain the ability to synchronize operations, ensure real-time data accuracy, and create a unified view of processes. This integration streamlines workflows and enhances decision-making by providing reliable and accessible information, enabling smooth collaboration and maximizing the overall impact of your automation strategy.



Explore Automation Solutions

Unify processes, connect systems, and empower everyone to use automation tools.

Achieving optimal organization-wide efficiency, collaboration, and results starts by investing in a single, user-friendly automation platform that allows business users, IT teams, and developers to create seamless experiences for both employees and customers.

The [MuleSoft Automation suite](#) helps you do just that by giving you the ability to:

- **Orchestrate and manage processes:** By breaking down barriers across people and systems, automation enables humans and agents to deliver better customer experiences more efficiently.
- **Connect every system:** Integrating commonly used systems and applications ensures an efficient, unified operational environment where relevant data is accessible to humans and AI agents at the right time.
- **Enable intelligent agent orchestration:** Build AI agents that can intelligently compose and sequence a workflow using a library of building blocks and connectors to automate complex processes and adapt to changing inputs.
- **Empower everyone:** Having tools that both business users and developers can easily use while IT maintains oversight allows more room to scale and innovate quickly.

Easy to Implement, Easy to Use

MuleSoft's Automation suite makes it easy for users to build powerful automations without requiring extensive technical expertise.

- **Low-code and no-code tools:** Prebuilt templates, connectors, drag-and-drop tools, and natural language prompts enable users of all technical levels to create and manage workflows.
- **Prebuilt connectors:** Seamlessly connect various systems and applications with clicks, not code.
- **End-to-end governance and monitoring:** Maintain comprehensive oversight and control of all automated processes, ensuring compliance, security, and performance standards are consistently met.
- **AI and natural language capabilities:** Enable users to interact with systems and workflows using everyday language to create intuitive and intelligent automations.

Now that you understand the key qualities of a holistic automation platform, let's dive into some of the individual tools and their capabilities.



Flow Orchestration

Orchestrate long-running processes that manage how work gets done across people and systems with [Flow Orchestration](#).

- **Orchestrate end-to-end workflows:** Coordinate complex, multi-step processes across various systems and teams, ensuring seamless execution from start to finish.
- **Streamline approval management:** Automate the routing and tracking of approval requests to enable timely decisions and reduce bottlenecks.
- **Collaborate faster:** Allocate tasks at the right time and surface next steps to streamline processes between teams.
- **Track progress:** Track the status of your processes, spot potential bottlenecks, and easily manage permissions.

Flow Builder

While Flow Orchestration manages multi-user and multi-system workflows, [Flow Builder](#) helps manage linear workflows.

- **Automate data entry:** Capture user inputs by building dynamic, interactive forms that automatically react to and surface information.
- **Automate tasks for humans and agents:** Build automations that take action automatically or are triggered by a specific event, such as when an opportunity closes, to help eliminate many of those manual tasks that impact productivity.

MuleSoft for Flow: Integration

[MuleSoft for Flow: Integration](#) simplifies system integration with low-code, click-based connectivity, enabling users to build event-driven integrations using prebuilt connectors.

- **Take action inside and outside of Salesforce:** Trigger a workflow based on changes in common systems or extend Agentforce actions beyond CRM.
- **Create secure connections with low-code:** Easily create and configure secure connections in clicks and reuse them in the Automation app.
- **Map and transform data in-line:** Perform in-line field mapping leveraging Flow's data transform element.

Robotic Process Automation (RPA)

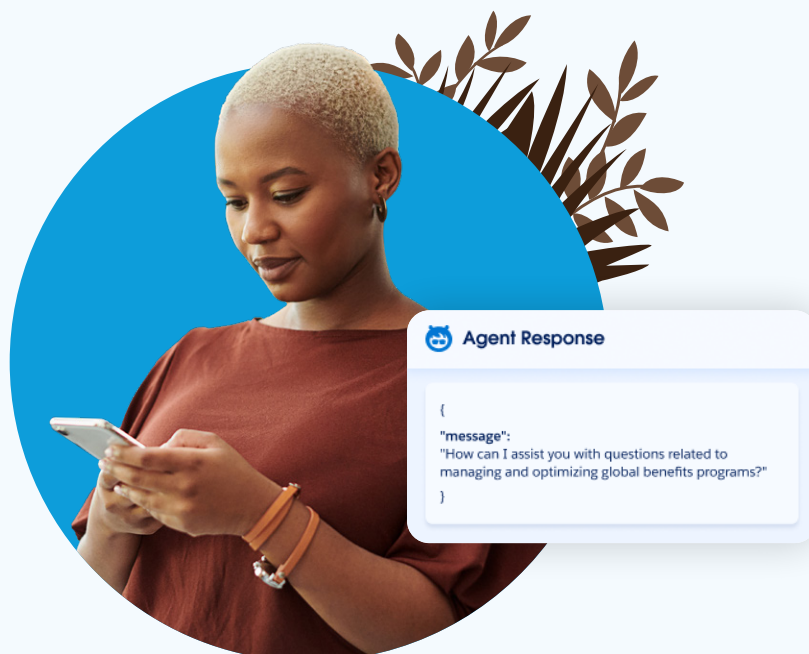
MuleSoft RPA allows organizations to connect to legacy systems and automate repetitive tasks, bringing older technologies into modern workflows without extensive overhauls.

- **Evaluate processes:** Identify the most impactful processes to automate based on measurable outcomes.
- **Build with confidence:** Configure and implement RPA processes using a diverse, easy-to-use toolbox and templates.
- **Accelerate implementation:** Speed up process design and automatically transform workflows into process maps.
- **Test, run, and scale:** Ensure your automated processes run smoothly and reliably while enabling fast scalability.

Intelligent Document Processing (IDP)

MuleSoft IDP automates tasks associated with document handling and unstructured data, maximizing efficiency and minimizing costs throughout the entire document lifecycle.

- **Streamline document management:** Automate tasks related to document handling to reduce processing time and errors.
- **Accelerate time to value:** Leverage pre-trained models for common document types to speed up automation efforts.
- **Enhance accuracy:** Use AI to significantly improve accuracy and reduce costs by automating manual tasks that involve paper documents.
- **Intuitively jumpstart document projects:** Use natural language prompts with Einstein for IDP to analyze, classify, and extract data from unstructured documents.



See Use Cases and Outcomes

Now that we've looked at how Salesforce supports a cohesive automation strategy let's see how this approach can be implemented to achieve optimal efficiency, collaboration, and results.

Use Case: Quote to Cash (QTC)

Improve visibility across quotes, orders, and invoices, and streamline operations from quote to cash.

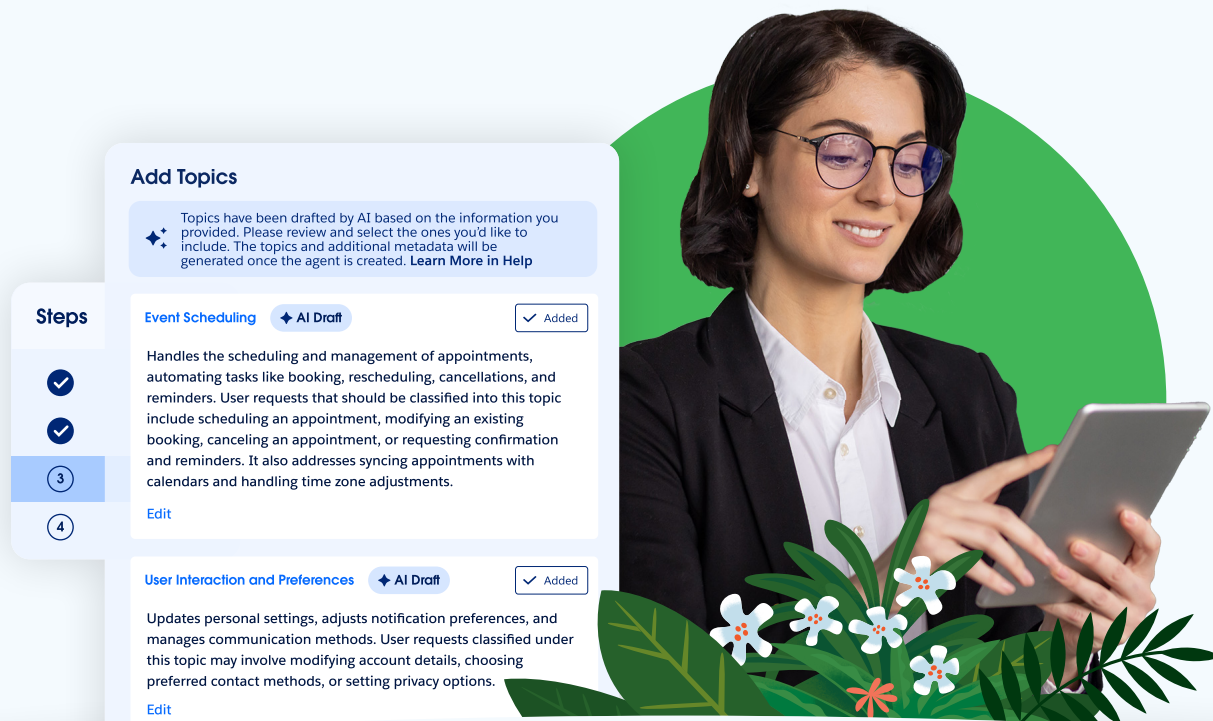
Challenge

Due to clunky handoffs between sales, order processing, billing, and finance teams, the quote-to-cash process often suffers inefficiencies. Frequently, teams waste valuable time switching between spreadsheets and third-party systems to create contracts, manage orders, and handle invoicing.

Solution

Streamlining every step from the initial quote to the final payment requires integrating all relevant systems – including billing, ERP, and inventory – to unlock critical data and accelerate sales cycles. Automation removes manual tasks across departments, speeding up approvals, handoffs, and collaboration between teams while centralizing visibility and governance, which ensures that processes remain compliant, secure, and transparent, reducing risks.

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Use Case: Customer Onboarding

Provide customers with a seamless onboarding experience to start building the strongest possible relationship from day one.

Challenge

The customer onboarding process is often filled with inefficiencies due to handoffs between sales, customer support, and IT teams. Many teams spend valuable time navigating between multiple systems to capture data, send notifications, and update records. This fragmented approach can lead to delays, increased errors, and a less-than-optimal experience for new customers.

Solutions

Automating this process creates a seamless flow from the initial form submission to the final welcome message. By utilizing connected data and integrated systems, the onboarding process can proceed smoothly, ensuring that every step – such as gathering the necessary documentation, validating information, setting up accounts, updating systems of record, and sending thank you messages – happens without unnecessary holdups.

Use Case: Incident Management

Accelerate resolution time and deliver a better customer experience.

Challenge

Incident response teams frequently face challenges due to disconnected communication between IT, security, and operations teams. This fragmented approach can lead to delayed responses, increased errors, and a suboptimal resolution experience for those involved.

Solutions

Create a smooth progression from incident detection to resolution. The incident response process can advance smoothly using connected data and integrated systems. This ensures that every step – such as detecting and logging incidents, classifying, and routing them appropriately, diagnosing issues, resolving and notifying teams, closing incidents, and informing affected parties – occurs without unnecessary delays.



Customer Story RBC Wealth Management

RBC Wealth Management, a division of RBC Capital Markets, LLC, provides trusted financial advice and wealth management solutions to individuals, families, and institutions.

Traditional, process-heavy approaches don't always create the best client experiences in the financial services industry. Onboarding new clients, for example, often involves a cumbersome 100-page physical document with sticky notes marking where to sign.

To streamline this process, RBC Wealth Management partnered with MuleSoft. They transformed their case management workflows by using low-code automation, adding custom features, and designing a customer-first digital experience. This improved approach reduced onboarding time from several weeks to an average of just 24 minutes.


"The scalability of the platform helps our admins and developers build the automations and tools that really help the advisors serve their clients' needs."

– Rohit Gupta, WealthX Director, RBC Wealth Management

[Learn more about RBC's digital transformation with MuleSoft](#)



Automation is helping organizations achieve faster, more efficient outcomes across departments.*

- **31%** increase in sales productivity
 - **24%** decrease in service/support costs
 - **30%** increase in overall marketing ROI
 - **25%** decrease in costs of placing orders over legacy channels
 - **31%** faster automation of business processes
- 

*2024 Salesforce Success Metrics Global Highlights. Data is aggregated from 2,165 customers across 9 countries.

Scale Your Automation Initiatives

Having the right approach to automation can transform the way your business operates. When organizations connect siloed people, systems, and bots, they unlock the full potential of automation, enabling teams to save valuable time, boost productivity, and provide better experiences for their customers.

By aligning your automation strategy with your broader IT infrastructure, you ensure that every part of the organization is working in harmony, enhancing efficiency and creating a foundation for scalable solutions that can grow as your business evolves. With a comprehensive automation strategy and the right tools, you can seamlessly expand your automation to tackle even the most complex use cases, making it easier than ever to stay ahead in today's fast-paced business environment.

Extend your automation platform with even more powerful integration, data, and AI capabilities.

- [Anypoint Platform](#) offers tools for API management, data integration, and workflow automation.
- [Data Cloud](#) provides scalable storage for data used in automation and integrations, ensuring data is accessible and secure.
- [Agentforce](#) empowers AI agents to scale their automations to ensure consistent and efficient operations across all customer interactions.

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Dive Into Automation

Adopt a trusted and unified platform.

Learn how MuleSoft can help your team increase productivity, democratize innovation, and ultimately create exceptional customer experiences.

[Get connected](#)

Find out how to overcome key automation challenges and see a live demonstration of the MuleSoft Automation suite in action.

[Watch the webinar](#)

Learn how MuleSoft brings together AI with best-in-class integration, automation, and API management to transform employee and customer experiences.

[Watch the Dreamforce keynote session](#)

Explore how automation is revolutionizing work and changing how organizations drive productivity.

[Learn more](#)



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For more information please visit Salesforce.com, or call [1-800-No-Software](tel:1-800-No-Software).

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About MuleSoft

Almost two decades ago, MuleSoft was the first to introduce the world to API-led connectivity. Today, we’re a trusted solution in multiple categories. We power 7.56 billion customer integration transactions daily. Additionally, we’ve been named a Leader in the Gartner Magic Quadrants for iPaaS, API Management, and Low-Code Application Platform. Salesforce acquired MuleSoft in 2018.