

Workato Integration Ends Manual Case Handling for a Global Contact Center Software Leader



The Customer

A global leader in cloud-based contact center software, the company uses Salesforce to manage customer support cases at scale. As case volumes grew, it needed automated integration between Salesforce and connected applications like ServiceNow to keep support operations accurate and fast.

The Challenge

Manual case handling was creating errors, duplication, and slower support as the business scaled

- Agents manually creating and updating cases across systems, increasing time and error risk
- No system-level sync between Salesforce and ServiceNow, resulting in duplicate cases
- No automated integration layer to keep real-time communication between platforms
- Manual handling slowing case resolution and affecting customer satisfaction
- Growing case volume outpacing what manual processes could support

The Solution

CriticalRiver built a real-time integration between Salesforce and ServiceNow using Workato, removing manual intervention from the case lifecycle.

- Real-time, bi-directional API integration between Salesforce and ServiceNow
- Case creation and updates in Salesforce reflected instantly in ServiceNow
- Automated case lifecycle synchronization end to end
- Built to scale with rising support case volume

The Results

The integration replaced manual, duplicate-prone case handling with a consistent, automated workflow.

- Faster, more consistent customer support
- Elimination of confusion and rework from duplicate cases
- A scalable framework for growing support volume

Impact Delivered

- 100% elimination of manual case creation and updates
- 90% reduction in duplicate case incidents
- 60% improvement in case resolution time

Solution Components

Workato Automation Platform, Real-Time API Integration (Salesforce <—> ServiceNow), Bi-Directional Data Sync (Inbound & Outbound), Case Lifecycle Synchronization