Catalytic CXO Letter Template

# Purpose

*The goal of this letter is to help you secure buy-in for Catalytic from your C-level executive or main budget holder. Bolded sections and this letter overall are meant to be personalized based on your specific goals and anticipated outcomes with Catalytic. Catalytic’s* [*Business Impact Assessment*](https://catalytic.pushbot.com/form/business-impact-assessment) *and* [*Automation Potential Calculator*](https://catalytic.pushbot.com/form/automation-potential) *can be used for help in your estimates.*

Hi **[Insert CXO Name]**,

I’d like to discuss **[Insert company/department name]**’s urgent need to **[Insert main business problem. Examples: increase agility/revenue/speed/efficiency/adapt and innovate in this environment of constant change]** in order to **[Insert largest priority reason for urgency. Examples: keep up with competition/improve customer experience/reduce costs/succeed on the recent \_\_\_ initiative/solve \_\_\_ problem/comply with the recent \_\_\_ regulation]**.

We’ve determined that automating **[Insert process name(s)]** could make significant and immediate impact on the above needs, resulting in **[Insert benefits and potential outcomes. Examples: \_\_hours saved annually, $\_\_\_ saved, \_\_% faster turnaround, \_\_% less errors, $\_\_ in potential new revenue opportunities]**.

One significant trend is rising to make this more possible than ever before: no-code workflow automation. This means we in **[department name]** can tackle automating this use case quickly and safely with little or no IT resources.

To this end, I’d like us to consider an investment in Catalytic, the only no-code platform that is simple and powerful enough for us to build our own automated workflows like this one, while also providing enough control and visibility for us to do so with IT-approved governance.

Below I’ve outlined more on how we can use Catalytic to solve operational challenges with minimal burden on our technical resources, and the value we could expect as a customer.

### What is Catalytic?

Catalytic is a cloud platform that allows people across departments and technical skill levels to build and run dynamic, rules-based workflows to standardize and automate almost anything for game-changing efficiencies. Without code, users click and combine hundreds of modular capabilities designed to coordinate tasks, connect existing systems, and leverage automated actions and AI throughout any process. Once workflows are built, we can use the same platform to run, manage, and track them all with full visibility. With each Catalytic workflow built, companies operate faster, more efficiently and without friction.

It’s the only cloud platform created for citizen development, balanced with governance—and above all—with people in mind.

All in one platform:

* We as business users can safely build and improve the processes we know best
* IT and pro developers can have built-in controls and access to advanced tools
* Employees or other end users can track automated workflows and complete their day-to-day tasks more efficiently within the platform

This can allow our technical and non-technical groups to partner like never before. We on the business side can create the operations for our specific needs, our employees’ time is saved in their workflows, and IT and developer bandwidth is freed up to focus on more advanced projects to innovate even further.

## What challenges does Catalytic solve?

We may have tried tools like BPMs, DPAs, IPaaS or RPA to solve the need for automation in the past. However, these efforts often require heavy development projects, maintenance and software developers. Catalytic breaks through that barrier with a lightweight, no-code workflow automation solution.

**[Department’s]** first use case to automate and dramatically improve **[process name(s)]** could be just the beginning with this unlimited platform.

On the back of this success, multiple Catalytic workflows like these can fulfill the need to finally solve any of our years-long operational challenges, overcome limitations of other tech, and provide greater visibility, unified data, and alignment for our teams. Ultimately, the time, cost, and risk savings can allow us as a company to do more mission-critical, strategic, and value-added work.

## Catalytic is being used by Allegis Group, Bosch and Mayo Clinic, to name a few. What does ROI look like?

**[Select 2-3 below]**

* [Bosch](https://cdn2.hubspot.net/hubfs/5600897/Content/Case-studies/190904-case-study-bosch-rapidly-scales-automation.pdf) is a good example of building and scaling a citizen developer program with over 50 builders, 1000 workflows and 5 million tasks automated in the first year.
* This [certification and testing company dramatically improved invoice intake process with Catalytic](https://cdn2.hubspot.net/hubfs/5600897/Content/Case-studies/190904-case-study-global-company-invoice-intake-process.pdf), automating 90% of the process with humans in the loop for training and handling exceptions.
* [Grant Thornton built a holistic procure-to-pay solution with Catalytic](https://www.catalytic.com/resources/case-study-grant-thornton-lp). This is one of three new digital products built by Grant Thornton and powered by the Catalytic platform.
* [Hyde Park Angels tapped Catalytic to streamline operations](https://f.hubspotusercontent40.net/hubfs/5600897/Content/Case-studies/2020-09-Case-Study-HPA.pdf). HPA improved the customer experience of their 100+ investors while also decreasing manual effort by 80% and improving security.
* This i[nsurance brokerage used Catalytic to](https://cdn2.hubspot.net/hubfs/5600897/Content/Case-studies/190904-case-study-insurance-brokerage-company-drives-efficiency-accuracy.pdf) reduce turnaround time for customer quotes while also significantly decreasing manual effort by 90%.
* This [logistics company reduced their manual effort for scheduling by 92%](https://cdn2.hubspot.net/hubfs/5600897/1910-Case-Study-logistics-leader.pdf). This also improved employee engagement by shifting them from low-value work to improving customer experience.
* One [music streaming service optimized its ATS with Catalytic](https://cdn2.hubspot.net/hubfs/5600897/Content/Case-studies/2020-03-case-study-music-streaming%20-service.pdf). This process improved information flow, feedback, and GDPR compliance while saving employees’ time.
* [Mayo Clinic scaled automation throughout its HR organization with Catalytic](https://cdn2.hubspot.net/hubfs/5600897/Case-Study-Mayo-Clinic-scales-automation-throughout-its-HR-organization-with-Catalytic.pdf). Four builders at Mayo Clinic improved employee services processes while recapturing 40,000 hours of work.

**[During our trial/proof of concept, we have already accomplished \_\_\_\_]**

We are looking at an investment of $**[\_\_\_\_ annually].** This includes the platform, virtual trainings and a guided customer success journey. By calculating the expected ROI from Catalytic, we would be able to recoup the initial investment in **[\_\_ months/ \_\_ quarter(s)]**, along with quantifiable **[time and cost savings/new revenue]** as well as qualitative impact on the experiences of our employees and customers.

Let me know if you have any questions. I’m happy to coordinate a demo or meeting with the Catalytic team and our stakeholders about how this could be a game-changer for **[company name/department name]**’s **[Insert broad goal. Examples: Operational excellence/digital transformation/employee or customer experience/market growth]**.

Thank you,

**[Your name]**