

# Catalytic, the no-code workflow automation platform for citizen development

A Technical overview of  
the Catalytic platform

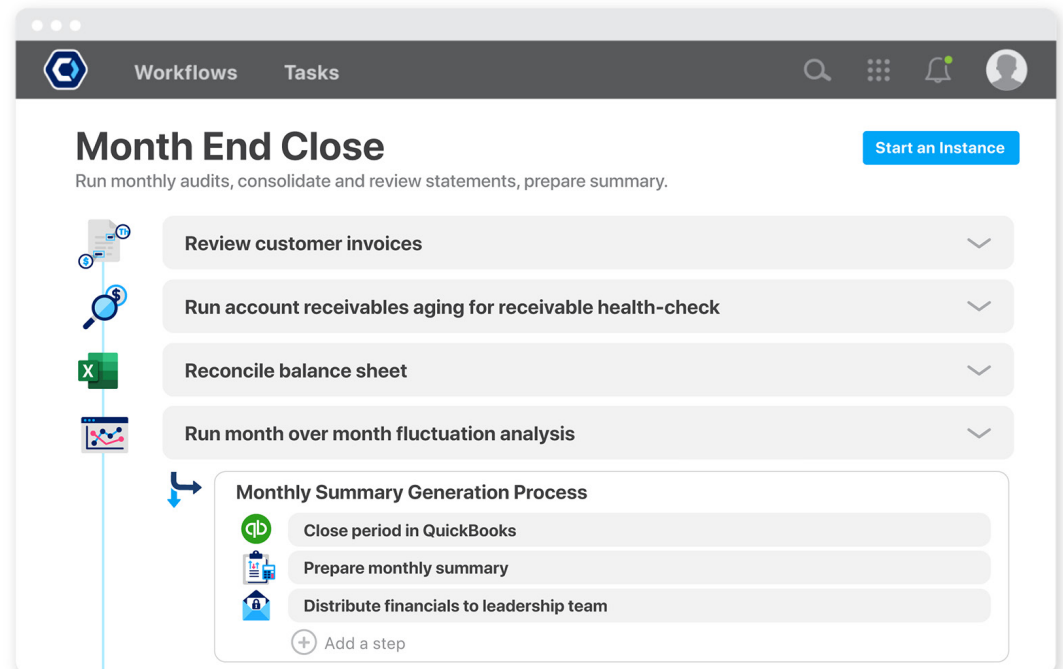




# Simple enough for business users, powerful enough for citizen development

Catalytic is the no-code workflow automation platform for citizen developers to digitize business operations, making work faster and more efficient—without friction or heavy development. Combine hundreds of modular capabilities designed to coordinate tasks, connect with your existing systems, and let automation and AI complete the rest.

It's the only cloud platform created for citizen development, balanced with governance—and above all—with people in mind. The web-based interface is business-user friendly for instant setup, rapid building and agile changes. At the core is a self-managing, intelligent data layer driving it all forward for powerful processing, visibility and a low-maintenance, dynamic infrastructure.



- Remove the need for IT teams within the business to do infrastructure, deployment, version control themselves
- Enable centralized automation teams to be 10x more productive by giving them a platform to rapidly build and deliver innovative solutions for customers
- Let business users build with a safe, simple tool, while developers leverage the same platform to add advanced functionality business users can reuse without code



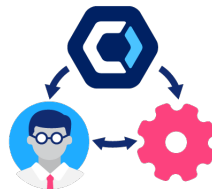
## What if you could have 10x more technical resources?

If you're like most companies, there's a mismatch between the supply and demand for software development and an increasing pressure to digitize and automate business operations.



## Tech-savvy employees have always been up to the challenge.

Citizen developers are employees who create software solutions, but are not professional software developers. This is not a new concept and is already done at scale within most businesses with tools like Excel. However, spreadsheets were not meant to run business processes, posing risks, fragility and little visibility.



## Now, they can have a tool to do it safely while saving time for professional software developers.

Catalytic is a no-code platform that's both user friendly and powerful enough for devs and technical governance, allowing business users and technical groups to collaborate like never before.

It's a win-win partnership as the business can digitize faster and overcome the challenges they know best, while offloading common projects from professional IT and software developers in order to focus on more advanced goals.

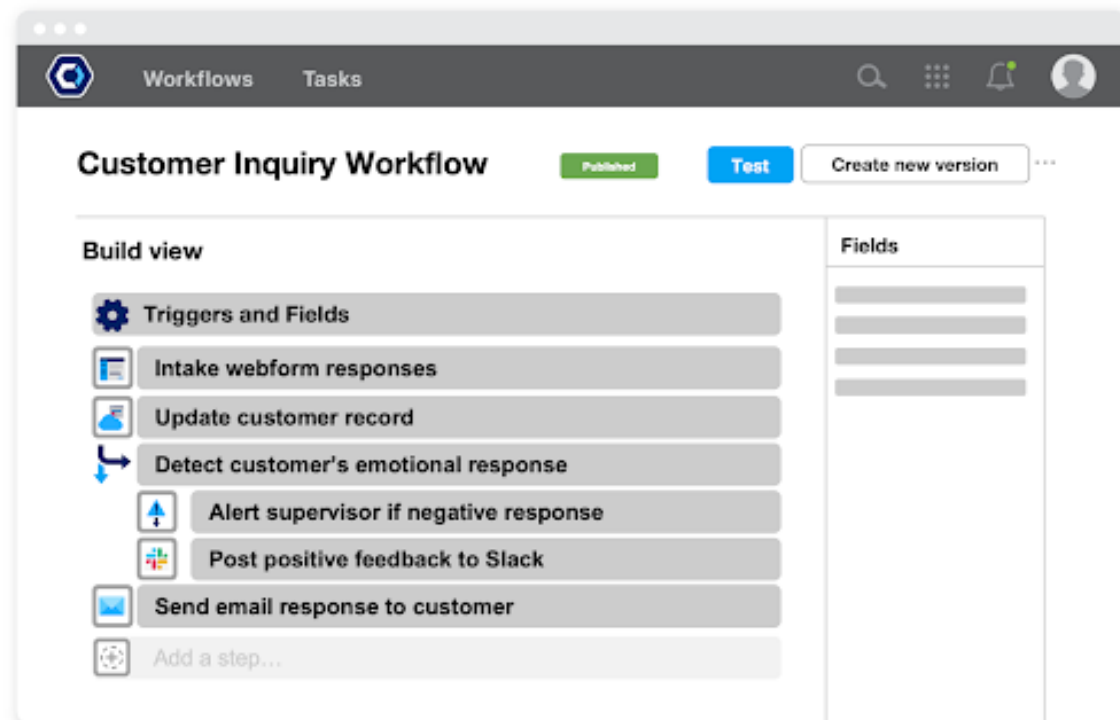
# How does it work?

## Catalytic Builder

The Catalytic Builder is a browser-based IDE for citizen developers. It uses basic building blocks called actions.

Create rules-based workflow automations in a no-code outline format, the most intuitive and practical for non-developers.

Just start typing what you want each step to do. The AI-assisted builder will recommend an action. Then, click-and-configure.



## Advanced Features

- Turn custom code into reusable no-code actions
- Connect custom integrations
- Leverage APIs
- Power backend workflows by embedding Catalytic into your app with the Software Development Kit (SDK)
- Integrate Catalytic into your IT processes with the Command Line Interface (CLI)
- Reference documentation on the Catalytic developers site

## Mix and match capabilities

### Workflow actions:

- Tasks
- Forms
- Email and text notifications
- Integrations with apps like Slack and ticketing system

### Logic

- Set dependencies & conditions: Run actions chronologically or combine dependencies and conditions for a wide variety of complex logic and flow.
- Conditional blocks: Actions can be grouped together for traditional if/then branching.
- Batching/Iteration: Perform an action over rows in a data table, spreadsheet, or CSV
- Looping

### Automated actions:

- Data processing: Validation, calculations and spreadsheet filtering
- Text analysis: Sentiment analysis, OCR, and fuzzy matching
- Document assembly: Generate various file types
- Integrations: Connect to common cloud systems
- Browser automation: Automate simple, repetitive web tasks
- Predictions: Create and use a machine learning model

### Control actions:

- Manage the state and flow of Actions within a Workflow. Examples: Rename workflow, Reopen task, End workflow, etc.

### Triggers

- Web form submissions
- Emails and inboxes
- Webhook (API)
- SFTP
- Slack
- System integrations
- Schedules
- Other workflows
- Manual start



# Data Layer

Every workflow runs on a self-managed master data table. No need for database administration.

This functions as a data store for field references in building a workflow, during an active workflow and as a persistent store.

Users can also build their own tables. While a workflow can work directly with spreadsheets, data tables can be a centralized and governable replacement.

The screenshot displays a web application interface for a workflow titled "Customer Inquiry Process". At the top, there are tabs for "Workflows" and "Tasks", along with search, grid, and notification icons. Below the title, there are two buttons: "Start an Instance" and "Open Builder". A summary row shows the workflow's status: OWNER (Sean Chou), STARTED (2 days ago), TRIGGERS (0), ACTIONS (3), and ACTIVE INSTANCES (0). Below this, there are three tabs: "INSTANCES", "INSIGHTS", and "DATA". The "DATA" tab is selected, showing a section titled "Data Tables" with the description "Where this Workflow stores and shares data. Edit data tables and add or edit predictive models." Below this, there are three items listed: "Master Data Table" (Built-in table where everything is collected), "Data Table" (FAQ responses), and "Predictive Model" (Auto-response accuracy). Each item has a right-pointing arrow for further action.

OWNER	STARTED	TRIGGERS	ACTIONS	ACTIVE INSTANCES
Sean Chou	2 days ago	0	3	0

**Data Tables**  
Where this Workflow stores and shares data. Edit data tables and add or edit predictive models.

- Master Data Table**  
Built-in table where everything is collected
- Data Table**  
FAQ responses
- Predictive Model**  
Auto-response accuracy



## Predictive models

Catalytic's data layer makes it accessible for citizen developers to use machine learning. Select the data table that will be the learning set, then choose the field to predict.

Use the model with the "Make a prediction" action. Predict outcomes and approvals, forecast estimates, classify information and identify risks and anomalies. A confidence rating will also be generated, making it easy to set a threshold that will keep humans in the loop for exceptions.



## Data security and governance

To keep data secure and comply with policies, the Catalytic platform provides for:

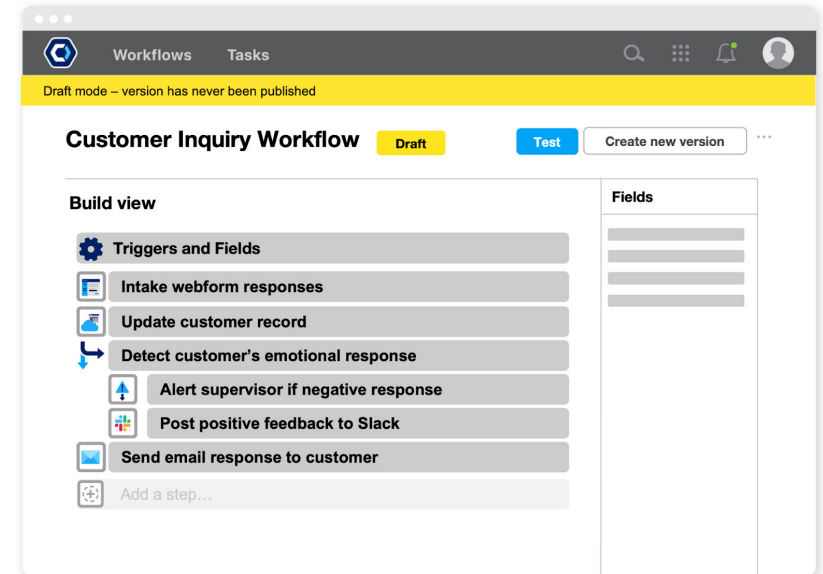
- Data table permissions, including at the field level for fine-grained control of data access.
- Data is stored encrypted at rest in Data Tables.
- Scheduled data retention policies can be set programmatically or at the workflow level, automatically ensuring past data is removed.
- Platform is aligned to SOC 2, HIPAA, and GDPR requirements.

**[Learn more about Catalytic's security and architecture](#)**

## Testing and review

The platform natively supports simple version control on workflows.

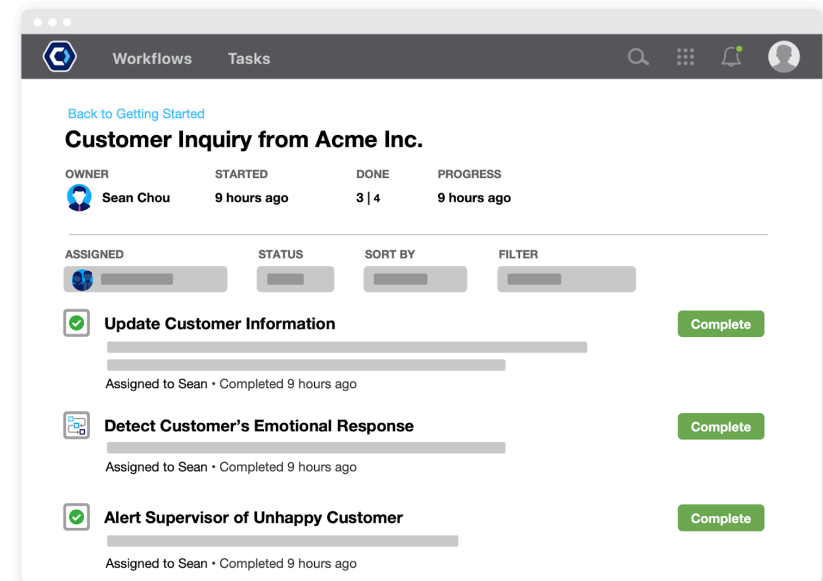
Catalytic also supports a publication review and approval process. Set up simple to complex rules specific to your environment and structure.



## End user experience

Catalytic coordinates and tracks progress of your live workflow through the same app for complete visibility.

Tasks and forms can be completed in Catalytic while other steps are automatically done in the background or integrated with your other tools.



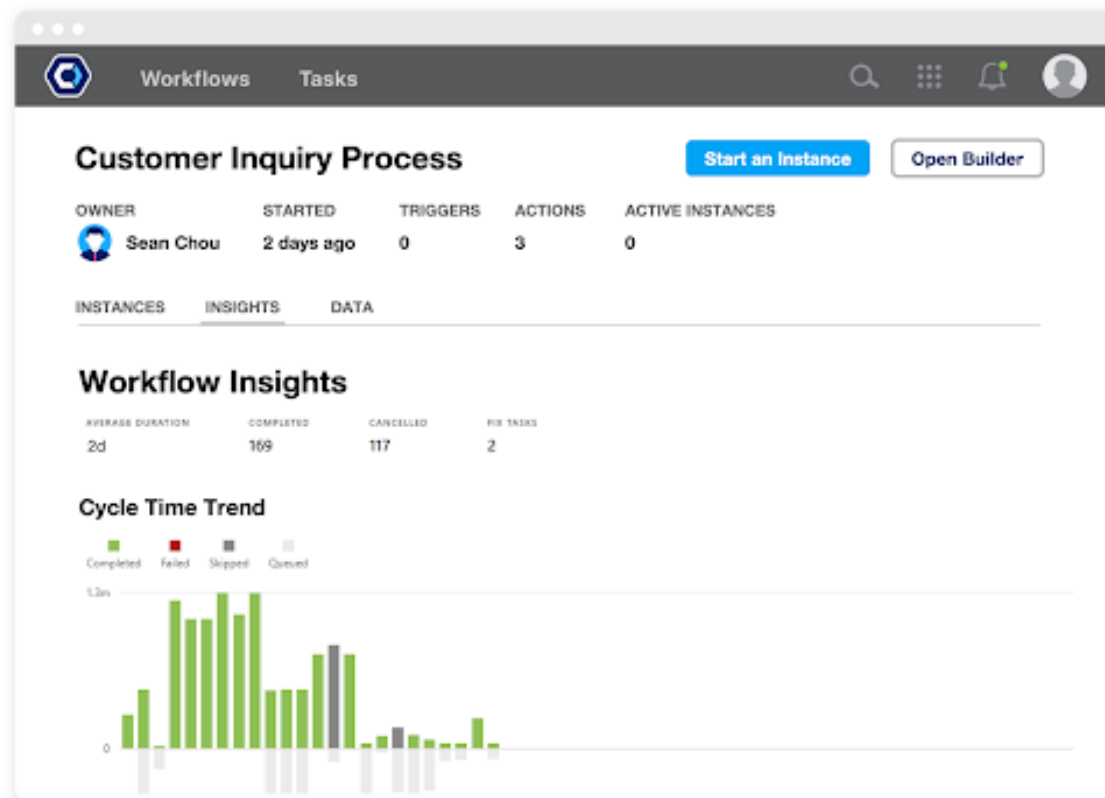


# Continuous improvement

The workflow engine monitors instances for breakage and stalls, automatically assigning tasks for error routing for fixes on the fly.

The Insights view automatically visualizes built-in process data to provide operational intelligence, identify bottlenecks and process gaps.

Find opportunities to adapt your workflow, adding more automation, AI or predictive models over time.



# Where to start

## **Top areas where customers use Catalytic workflows**

- People operations
- Finance operations
- Supply chain operations
- Customer operations

## **Guided implementation journey**

- Catalytic Academy virtual training
- Workflow templates library
- Help site
- Customer Community site
- Support team
- Customer success team

## **[Read the Catalytic success playbook](#)**

## Popular workflow patterns to start with



### Onboard and maintain information

- Employee onboarding
- Supplier onboarding
- Customer onboarding
- Financial record gathering



### Create consolidated reports, KPIs, and deliverables

- Month-end close
- Compliance reports
- Headcount reports
- Quarterly presentations



### Process forms, orders, and requests

- Payment data and remittance
- Approvals
- RFPs
- Reviews and surveys

# Benefits of Catalytic platform



## Agility

Catalytic Workflows are fast to set up and easy to maintain, allowing for rapid response to a rapidly changing world.



## Scale

The combination of citizen developers with a multi-purpose platform allows for broad adoption across an entire company.



## Standardization

A centralized platform combined with enterprise controls creates a safe, governed environment and visibility into everything that's happening.



## Operational Excellence

Evolving operational processes with data-driven insights driving continuous improvement will promote excellence.



## Employee Engagement

Focus employees on activities requiring human judgement, creativity, and empathy. Upskill employees and empower them to improve their own work lives.

# Benefits of Catalytic workflows



## Visibility & Unified Data

Unified data and real-time visibility into operations is often a foundation for everything else, making management and decision-making easier.



## Productivity & Speed

Workflow orchestration reduces communication and handoff delays, while automation increases the speed of performing common tasks, so you can recapture lost time to get more done.



## Quality & Compliance

Reduce errors from data entry, decentralized spreadsheets, and other manual activity. Make it easier to ensure adherence to process, evidence collection, and proper authorizations.



## Experience

Improved speed, quality and digitization can make a significant impact on customer, employee, and supplier satisfaction and experience.



## Revenue

Faster turnaround and the ability to scale up or down quickly can allow for more revenue capture. Digitization of existing IP and processes may offer brand new revenue opportunities.

*"We're on an exciting automation journey with Catalytic. We have an easy, reliable, and well-understood process in place that allows us to effectively scale our automation efforts."*

**Kate P.,  
Lead for New Technologies,  
HR**

## Customer Spotlight



**Mayo Clinic saves 40,000 work hours annually by scaling Catalytic**

Within the first six months of using Catalytic, Mayo Clinic automated 4,000 hours worth of work within its HR department.

By extending the use of the platform throughout the organization, the team has since increased its time savings to 40,000 hours annually.

[Read the case study](#)



# Get tangible results—fast—like other Catalytic customers.

Companies ranging from global powerhouses like Bosch, Grant Thornton and UL, to nimble startups like Spikeball have embraced workflow automation and no-code citizen development with Catalytic to do more with less, while overcoming years-long obstacles and reinvesting in their workforce.

**See it for yourself.  
Schedule a demo with us or start a free trial.**

**Get a demo**

**Start my trial**

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