Cloudorizon

CUSTOMER SUCCESS STORY

CASE STUDY

Asset Management Firm

Modernising the integration landscape with iPaaS.

How a leading asset management firm transformed its IT infrastructure through the adoption of Workato as its Integration Platform as a Service (iPaaS).

INDUSTRY	TIMELINE	PLATFORM	SYSTEMS
Asset Management	2020 – Present	Workato iPaaS	15+

PROJECT OVERVIEW

The Results at a Glance

A modern, decoupled, event-driven integration landscape — delivering scale, data quality, and efficiency.

130+ Business integrations in production	**700k+** Daily integration tasks
500GB+ Data processed daily	**2 FTEs** Manual workload reduced

In this case study

THE STARTING POINT

Background and Context

The asset management firm is the investments division of a privately owned bank. The firm has experienced exceptional growth over the past 15 to 20 years, which necessitated a restructuring — making it its own legal entity.

This restructuring triggered a review of the firm's IT infrastructure, which identified a “large bespoke code-base, hard to maintain and enhance, with key-man risk.” As a result, the firm decided to replace legacy systems with new cloud-based vendors — for example, SalesLogix was replaced by DealCloud.

A significant policy shift was the announcement of “no new development initiatives to be started.” This underscored the move towards leveraging off-the-shelf solutions and integration platforms.

Workato was selected as the new iPaaS due to its:

- Powerful and rich development environment

- Ability to be implemented with a “zero, or near-zero, code policy”
- Event streaming capability aligned with the firm's architectural vision

THE LANDSCAPE

Current Integration Landscape

The firm's integration landscape is extensive.

15+ Systems	**130+** Business integrations	**52** Live connections
~500GB Data transferred daily	**1,033** Active recipes	**~700k** Tasks executed daily

ARCHITECTURE

Key Design Principles

> ***Each system should remain decoupled from the overall ecosystem — with Workato's Event Streaming feature central to achieving this decoupling.***

Event Streaming

The pivotal role in system decoupling. There are currently 87 topics in production, primarily publishing changes from DealCloud (44 topics) and MUM (29 topics).

Standardised Project Structure

Each system is its own project, with a standard structure for organising recipes.

Functional Recipe Organisation

Recipes are organised by function: batches, subscriptions, publications, and entity services.

Entity Services Layer

A critical layer that encapsulates all CRUD operations in function recipes, abstracted away from the business layer — promoting reusability and simplifying business logic.

Triggered Recipes

These leverage entity-services recipes to implement complex integrations with ease.

Benefits of the Design Principles

Decouples source from destination	**Simplified dev & deployment**	**Improves efficiency — published once**
Subscriber agnostic to publisher	**Abstracts API complexities away**	**Dedicated CRUD recipes**
Simplified business-logic recipes	**Event stream provides durability**	**Integrations unaffected by downtime**

OVERCOMING OBSTACLES

Key Challenges and Solutions

IT Buy-in

CHALLENGE

The incumbent technology team initially viewed Workato as a threat.

SOLUTION

They were won over by illustrating Workato's agility — the team kept to tight timelines even when the direction of the business changed drastically.

Low Latency

CHALLENGE

The business demanded low-latency integrations (circa 30 seconds), but DealCloud doesn't provide triggers.

SOLUTION

This was overcome by developing a configurable polling mechanism.

Staying Efficient

CHALLENGE

As the project matured, task consumption became a priority — and the inherent nature of Event Streaming can lead to unnecessary subscriber jobs.

SOLUTION

The firm developed a hashing mechanism to detect and only process relevant messages.

OPTIMISATION

Efficiency Enhancements

The firm implemented specific technical solutions to improve efficiency and resilience.

Configurable Polling

Allows adjustments in polling frequency, workspace specificity, and entities checked — simplifying deployments and decoupling from publishers.

Subscriber Republish Requests

Enable simplified deployments, allow for downtime without data loss, support multiple publication routes, and facilitate reconciliation.

Subscriber-Driven Hashing

A fast, efficient mechanism that only hashes required fields — reducing integration runs by 5–50% and task consumption (c. 6 tasks in c. 150ms). Simple to integrate into existing recipes.

OUTCOMES

Success Metrics

The project has achieved significant success across platform, team, and business dimensions.

Platform

- 130 business integrations in production
- ~700k tasks per day
- Over 500GB of data per day

Team

- Democratised team of ~20 recipe builders
- Mature governance procedures

Business

- Vastly improved data quality and consistency
- Reduced manual workload — the Investran team alone saved 2 FTEs
- Improved controls and standardisation of procedures

WHAT'S NEXT

Future Integration Governance Framework

The firm is defining a comprehensive integration governance framework across several key areas.

Process Model Definition

Defining integration types (e.g. near-real-time master/slave, ETL source/consumer), process templates, patterns, interfaces, architectural approaches (Pub/Sub, ETL, point-to-point), responsible parties, supporting processes, logging methods, and issue/incident/support workflows.

Security Recommendations

Defining security concepts and ownership for each endpoint.

Common Component Management

Defining and managing shared components for logging, incident escalation, de-bounce, and common functions — including documentation, training, and regression testing.

Distributed Integration Team Guidelines

Establishing governance practices, roles, training recommendations, and security/permission concepts.

SUMMARY

Key Takeaways

- The firm successfully leveraged Workato to modernise its integration landscape, moving away from a complex bespoke codebase.
- A strong emphasis on system decoupling through Event Streaming is a core architectural principle.
- The project delivered tangible business benefits — improved data quality, reduced manual workload, and enhanced efficiency.
- The firm recognises the importance of robust governance for its growing integration ecosystem, and is actively defining the necessary processes, roles, and responsibilities.
- The focus on efficiency — particularly task consumption in event-driven architectures — highlights a mature understanding of iPaaS implementation.

Technologies Used

Workato iPaaS — Integration	**Event Streaming — Decoupling**	**DealCloud & MUM — Systems**

YOUR TRANSFORMATION

Modernise your integration landscape.

Cloudorizon helped this firm replace a hard-to-maintain bespoke codebase with a scalable, decoupled, event-driven iPaaS on Workato — processing 700k+ tasks and 500GB+ of data every day. Let's talk about what an iPaaS could do for you.

Get in touch cloudorizon.com/contact

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