Elevating Agent Catalyst to meet industry best practices

An in depth analysis on Workflows usability compared to leading AI products in the industry

Topics covered

- 01 **Opening Summary**
- 02 Onboarding
- 03 Workflow triggers
- 04 Building a Workflow
- 05 Agents
- 06 **Testing agents**
- 07 Closing Summary





Opening Summary

With the announcement of Agent Catalyst and the influx of new users this will bring, there have been concerns raised on the general usability of Workflows.

Workflows has become the parent product for Agent Catalyst, and has the potential to bring in many new customers. However, with the usability issues it currently has, this opportunity could be lost.

In the following slides we take a look at leading AI products including: Zapier, Lindy, n8n, AgentForce, Copilot, Glide and others. We then compare the current Workflows experience to the proposed experience we would like to provide our users.

The objective for these proposals is to reduce complexity for new and existing users who want to leverage AI and AI Agents in Workflows.



Onboarding

Delivering an intuitive onboarding experience is critical to driving a successful user experience.

Topics covered: Templates, help tutorials and AI Integration

01	Opening Summa
02	Onboarding
03	Workflow triggers
04	Building a Workfl
05	Agents
06	Testing agents
07	Closing Summary

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Onboarding | What is the competition doing

Starting from scratch



With Zappier, users can write in natural language what they want the workflow to accomplish. Al will then compile workflow steps for them. (Shown in video.)

Zapier also presents clear 'Add trigger' and 'Add action' steps. This quickly communicates to the user what they need to do first and introduces key concepts.

(Video)





Onboarding | Workflows

Starting from scratch in Workflows is intimidating 🧐

Current experience (Video)

- \checkmark Leads user to a familiar canvas format.
- \checkmark First step is created for them.
- \times It's unclear for users what the user should do next.

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Proposed experience

- \checkmark Leads user to a familiar canvas format.
- \checkmark Steps to create a Workflow are visibly obvious.
- \checkmark The structure of a Workflow is introduced, along with key concepts like trigger events and actions.

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Onboarding What is the competition doing

Starting from a template

Lindy

Lindy provides an extensive template library for users to choose from. Once a template is selected, users are directed to the areas they need to pay attention to, making the process to complete a personalized workflow much faster.



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		After email sent	for direct responses.
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			to guide Lindy's writing.

Onboarding | Workflows

Starting from a Workflows templates takes significant effort 😪

Current experience

- \checkmark We provide a library of templates to choose from.
- \times Users have to click through every step to find what steps needs extra configuration.
- \times No explanations are provided, requiring the user to interpret each step on their own.

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Proposed experience

- \checkmark Templates are categorized into topics that make them easier to find.
- \checkmark Shapes that need extra configuration are highlighted and explained.
- ✓ Users know the steps they need to configure to have a working Workflow.

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Onboarding | What is the competition doing

Guiding users to success



Help content helps familiarize users with the capability of the product as well as key concepts.





Glide provides a similar way to view and walk through the product.



Onboarding | Domo Workflows

No help content is provided in the Workflow canvas 😁

Current experience (Video)

- \checkmark We provide links to help content and documentation in Domo Central.
- \times There is currently no help content provided in the canvas.





Proposed experience

- \checkmark Step by step tutorials guide the users through the product on launch. (Using Chameleon.)
- \checkmark Help tutorials are available at any time, covering topics on Workflow shapes and concepts.
- ✓ For in-depth questions, users can access documentation in Domo Central.

(i)	Help tutorials	Overeview					
ABC	Q Search	Q Search Task Center forms can receive user input and store values in variables. Task Center Forms					
	GENERAL	require user interaction to move forward.	Task Timer				
	Workflow overview	Go to Variables Tutorial or Knowledge Base to learn more.					
	Timers		GENERAL ^				
	Variables	1 of 3 Next >	Add title				
	Parameters		Add description				
	Mapping	Percent of Budget 20K sum of budget					
	WORKFLOW STEPS		FORM ^				
	Basic actions	Variables	Select queue				
	User tasks	Variables are user-defined inputs that store dynamic data	Queue Name				
	Custom automations	values. These values can be provided by user input or from within your Workflow.	Q Unassigned V				
	Domo Automations	Once variables hold data value,	Select a form				
	External automations	they can carry that to value to parameters through 'mapping'.					
		Go to Mapping Tutorial or Knowledge Base to learn more.					
		1 of 2 Next >					
?	Knowledge Base						

Workflow Triggers

Centralizing workflow configuration to enhance efficiency and reduce friction.

Topics covered: Trigger configuration and location

01	Opening Summar
02	Onboarding
03	Workflow trigge
04	Building a Workflo
05	Agents
06	Testing agents
07	Closing Summary

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Workflow triggers | What is the competition doing

Starting a workflow with a Trigger

ooco n8n

n8n provides a large selection of trigger options, all available and configured within the canvas.





Lindy offers a range of trigger options focusing on external integrations.



Workflow triggers | What is the competition doing

Starting a workflow with a Trigger

Glide

When creating a new Workflow, Glide presents the user with 4 key trigger options before they enter the canvas.





Workato recommends very specific triggers for common tasks their users have.



Workflow triggers | Workflows

Workflow triggers are created outside of the canvas 🤪

Current experience

- \checkmark Users can add more than one trigger to their Workflow.
- \checkmark Triggers tab provided excellent overview of which versions are configured with which triggers.
- \times Triggers are disconnected from the rest of thew Workflow building experience.

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Current experience

- \checkmark Users can add more than one trigger to their Workflow, within the canvas.
- \checkmark Trigger tab is still accessible to see Workflow trigger across versions
- \checkmark Triggers are easy to find and configure within the workflow canvas.

Building a Workflow

Reducing barriers to accelerate user productivity and deliver faster time-to-value.

04

Topics covered: Adding shapes, configuring, and general canvas navigation

01	Opening Summary
02	Onboarding
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Building a Workflow | What is the competition doing

Adding, deleting, and editing shapes in the canvas

Lindy

Plus icons to add a shape to the canvas is always viable.

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After constage sets	After reply received
Ō	\odot
Select next step	
Perform an action	+
E Search knowledge base	+
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Adding and deleting lines are clear, with instruction provided on how to drag to connect.



Building a Workflow User Testing results



Current experience

× In user testing, users struggled to connect a shape once they're disconnected. An orange outline appears around the canvas which is seemingly unrelated to re-connecting shapes.

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Note: This video is a recording of the current Workflows experience, not the user testing recording.

Proposed experience

 \checkmark Once the user clicks 'connect' a dotted blue line will follow their curser, intuitively informing the user that they are about to connect shape with the dotted line.



Note: Outdated interface. Designs made last year.

Building a Workflow User Testing results



Current experience

X During user testing, users struggled to find how to add the next step to their workflow. The add icon is only visible when the start shape is selected and active.

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Note: This video is a recording of the current Workflows experience, not the user testing recording.

Proposed experience

 \checkmark The option to add a shape is always visible, regardless of active shapes selected on the canvas.

•6	My Workflow		Unsaved changes 5 C Save :
(i)	Workflow variables		
ABC	ADD VARIABLE	TRIGGER EVENT Select how to start this workflow	
	Select data type Cancel Add variable	Event (data)	
	VARIABLES LIST		

Note: Outdated interface. Designs made last year.



Building a Workflow User Testing results



Basic Actions: Deleting a line

△ 9 out of 13 (69%) users failed to successfully delete a connecting line

Link to **full test results**

Current experience

× Users struggled to delete a line. This may have been influenced by the fact that it's difficult to select a line on the canvas.

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Note: This video is a recording of the current Workflows experience, not the user testing recording.

Proposed experience

- \checkmark Increasing the click radius on the lines will make them easier to select.
- \checkmark Making sure all lines behave the same will re-enforce a stronger mental model.

Building a Workflow What is the competition doing

Providing an Al-powered experience

Lindy

Using AI capability, users can write in plain text what they want a conditional pathway to do.





Using AI capability, users can write in plain text what they want a conditional pathway to do.



_zapier





Building a Workflow | Domo Workflows

Workflows falls short of Al-powered potential 😞

Current experience

- \checkmark We have a library of AI-powered tools that can be used inside and outside of an agent.
- \times AI capability is limited to the agent shape and AI tools.







Proposed experience

- \checkmark We still have a library of AI-powered tools that can be used inside and outside of an agent.
- ✓ Al is enabled at the workflow level, allowing other workflow shapes to take advantage of Al capability.
- ✓ Possible AI capability include: Using plain text to describe requirements, having AI generated suggestions for mappings values or DataSets, and more.

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Require user confirmation before any Agents are allowed to use skills with side effects.			Q Search		
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Building a Workflow | What is the competition doing

Testing on individual steps

oocon n8n

Each step can be tested individually. Here inputs and outputs are shown on either side of the step configuration panel.

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Testing is available on each workflow step. Here users can get an instant preview of the outputs/ data values each step provides.



s node to view data

Building a Workflow | Domo Workflows

Testing individual steps

Current experience

 \times Workflows doesn't currently support testing on individual steps.

Proposed experience

- \checkmark Individual steps can be tested to make sure they have the intended outcome.
- \checkmark Values are provided and can be checked without test running the entire workflow.

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04

Translating a complex concept into a guided, user-friendly building experience.

Topics covered: Key agent components including LLM, instructions, knowledge and tools

01	Opening Summary
02	Onboarding
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ry s low Agent Catalyst | Domo Palooza

What customers are expecting from Agent Catalyst



Our messaging promotes the idea of 4 easy steps to complete an Agent. We've also advertised for pre-built and custom agents.

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(AGENT CATALYST™)

How to build in Agent Catalyst

Choose your LLM

Define instructions

execute them effectively

Provide knowledge

Equip your agent with the right data, context, and insights it needs to perform accurately and efficiently.

Select tools

models to enable your agent to gather other agents







Agents | What industry leaders are saying

What Open AI has to say about Agents 🔽

Agent design foundations

In its most fundamental form, an agent consists of three core components:

01	Model	The LLM powering the agent's reasoning and decisi
02	Tools	External functions or APIs the agent can use to take
03	Instructions	Explicit guidelines and guardrails defining how the agent behaves

Agent components

Open AI recently released a document on AI agents. According to their document, 'core components' of an agent are having an LLM model, Al tools, and instructions. This is closely aligned with the messaging we've released on Workflows Agent Catalyst so far.

Link: A practical guide to building agents

on-making

action

Agents | What is the competition doing

Building an agent

oocon n8n

Inputs are pre-mapped to reduce complexity for the user. Here the input from the previous shape is already mapped to receive input from the chat trigger shape.

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Instructions are visible in the configuration panel, along with LLM model and skills.



Agents | Domo Workflows

Workflows makes a simple process confusing and un-compelling $\stackrel{\mathrm{eq}}{=}$

() This is the experience that **new users coming to try Agent Catalyst will experience**.

Current experience (Video)

- \checkmark Users can add an Al agent (Agent Catalyst) in Workflows today.
- \times Basic components of an agent (LLM, instructions, and tools) are not immediately visible.
- \times Inputs/outputs are presented in a an unfamiliar way in an already unfamiliar concept.

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Proposed experience

- \checkmark The process of creating an agent is laid out clearly, step by step.
- ✓ Inputs/outputs, tools, and the configuration process is presented in a way users are familiar with.
- ✓ The fields that the user need to fill out are presented in a clearer order, informing the user about which steps are primary and which are secondary.

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What Open AI has to say about Agent Tools 🔽

Defining tools

Tools extend your agent's capabilities by using APIs from underlying applications or systems. For legacy systems without APIs, agents can rely on computer-use models to interact directly with those applications and systems through web and application Uls-just as a human would.

Each tool should have a standardized definition, enabling flexible, many-to-many relationships. between tools and agents. Well-documented, thoroughly tested, and reusable tools improve discoverability, simplify version management, and prevent redundant definitions.

Broadly speaking, agents need three types of tools:

Туре	Description	Examples
Data	Enable agents to retrieve context and information necessary for executing the workflow.	Query transaction databases or systems like CRMs, read PDF documents, or search the web.
Action	Enable agents to interact with systems to take actions such as adding new information to databases, updating records, or sending messages.	Send emails and texts, update a CRM record, hand-off a customer service ticket to a human.
Orchestration	Agents themselves can serve as tools for other agents—see the Manager Pattern in the Orchestration section.	Refund agent, Research agent, Writing agent.

Agent tool types

Tool types are also similar to what we hope to implement. The tool type 'Data' is our 'Knowledge' and the type 'Actions' is our 'Tools'. The tool type 'Orchestration' is similar to our concept of nested workflows/nested agents. We have plans to accommodate for all these things in Workflows.

Link: A practical guide to building agents

Adding tools requires high level of effort and understanding Θ

Current experience

- \checkmark 'Action' tools can be added to AI agents in Workflows.
- × The amount of additional input required from the user is intimidating. Extra work is put on the user to determine what fields needs to be filled and what to fill them with.
- \times Inputs and outputs are shown in a new way, unfamiliar to the user.

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Proposed experience

- \checkmark Knowledge (data) and tools (actions) are separate, and can both be added to AI agents.
- The burden of adding AI descriptions to every tool input is taken off the user when possible. \checkmark
- ✓ Familiar design patterns such as drilling and Workflow mapping are maintained, allowing new concepts like Al powered 'Auto-fill' and Al descriptions to be more easily introduced.

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Transform a natural language question into a SQL query.		Connect with Apps you've created in Domo's App Studio.	Perform queries or updates on Domo Datasets	Text summarization, image-to-text, audio transcription, and more.
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Agents | What is the competition doing

Building complex agents



Flowise uses the idea of a supervisor agent that oversee worker agents to build larger, complex agents. This approach is comparable to our concept of nesting workflows within other workflows.



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		Worker		Role You are an experienced developer with experience in React, Typescript, Nodejs, Shadon, Tailwind, and other web technologies. # Tasks - Write clean and well commented code	b
		Inputs		- Make changes to the code based on the feedback from the code reviewer I	
		Tools			
		Supervisor*	8 8 8 4 6 6 6 6 8 8 4 9 9 9 9 6 9 9 8 9 9 9		
0		Tool Calling Chat Model 🕕		7	ince
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developer t, dcn,		# Role You are an experienced developer with experience in React, Typescript, Nodejs, Shadcn, + - : • • • • • • • •			



Agents | Domo Workflows

Building complex agents through nesting Workflows

Current experience

 \times Workflows doesn't currently support nesting Workflow, but it is something the team is aware of and wants to implement.

Proposed experience

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✓ Workflows team is working on Workflow outputs to enable nested workflows and the building of more complex agents.

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		Sentiment analysis agent Responsible for analyzing the sentiment of provid	ided content.		for it to be used as an output.
lete					Create output parameters and map them individually. If a variab hold a value, a default value must be added for it to be used as a
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Testing Agents

Enhancing user trust and confidence in agent behavior through agent testing.

Focusing on: Highlighting agent steps, tools and processes

02	Onboarding
03	Workflow triggers
04	Building a Workfl
05	Agents
06	Testing agents
07	Closing Summary

01

Opening Summary OW

Testing Agents | What is the competition doing

Agent run history and testing

🥏 Copilot

View 'History' of each agent to see it's reasoning and thinking. This same view is available when building and testing agents.





Agent responses are categorized into steps and collapsable sections.

Testing Agents | What is the competition doing

Agent testing

ooco n8n

Users can test agent chat functionality. The agent response is separated out into tools so users can quickly see which tools the agent called and how it used them.



Agentforce

Co-pilot allows batch testing, which has AI automatically generate dozens of test topics and outputs the agents responses.

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New Test

Test Name

Description

Service Agent Tests Which agent are you testing?

My Service Agent

Q, Jerome Bell (you)

Which user would you like to simulate?



Testing Agents | Domo Workflows

Testing requires sorting through long SQL responses 😐

Current experience

- \checkmark Agents can be tested to to make sure they deliver intended results.
- \times Users must scan through one large SQL response. There is no easy way to see which tools the agent called.

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Proposed experience

- \checkmark Agents can be tested to make sure they provide the expected result.
- Response is separated out into sections. Tools are highlighted to see which tools where called and what the response was for each tool.

ᡖ Customer Success Agent	• • •
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Closing Summary

If Workflows is to be the product for Agent Catalyst, non technical users need to become a top priority.

Workflows up to this point has been focused on becoming a feature-rich, highly technical product. The back-end functionality of Workflows is impressive, but without front-end attention, great work could be lost on users who find the product too challenging to use.

If non-technical users were to become the focus, teams could be empowered to focus the product on key concerns and use cases. This would also help teams identify success metrics moving forward, and strategize on how Workflows might be made a product success.

In addition to a defining a clear user base, support is needed to ensure the user-focused designs make it into the product and perform as intended. UX Design can suggest powerful, user-centric solutions, but engineering and PM stakeholders are the ultimate gatekeepers of implementation. If Agent Catalyst is to be made a priority, teams must also be aligned on one shared vision.

