

Unifying Operations and Customer Visibility via CRM Transformation

Industry: Banking & Finance | **Scale:** 5 Business Units | **Platform:** Creatio CRM

Executive Summary

One of the Caribbean's most prominent financial institutions — spanning banking, insurance, investment, and money services across 17 territories — struggled with fragmented customer data and siloed operations across Sales, Marketing, and Service. The absence of a single customer view across SBUs constrained cross-sell potential and limited operational scale. B-TRNSFRMD architected a comprehensive CRM transformation to unify customer data across SBUs and enable a strategic shift: from siloed, BU-led selling to a connected, group-wide model built for cross-sell, upsell, and sustained revenue growth.

Key Highlights

5

**Business
Units**

on a single Creatio instance

15

Business Functions

unified on single platform

200+

Business Workflows

developed across the
platform

2M+

**Records
Migrated**

into the unified data model

The Challenge: Fragmented Operations Limiting Growth

As the organization scaled across territories and business units, the absence of a centralized CRM created compounding operational inefficiencies — limiting visibility, productivity, and impacting cross-sell & upsell opportunities.

No Central System of Record

Each business unit operated on independent tools with no shared infrastructure to manage customers, leads, or cases consistently.

Disconnected Customer Data

With no synchronization between systems, customer information was duplicated and inconsistent — making a single view of the customer impossible.

Missed Cross-Sell & Upsell Opportunities

Without a unified view of customer relationships across SBUs, the organization was unable to identify or act on cross-sell and upsell potential at scale.

High Operational Overhead

Without automation, teams absorbed significant manual effort across data entry, reporting, and coordination — diverting capacity from customer-facing activity.

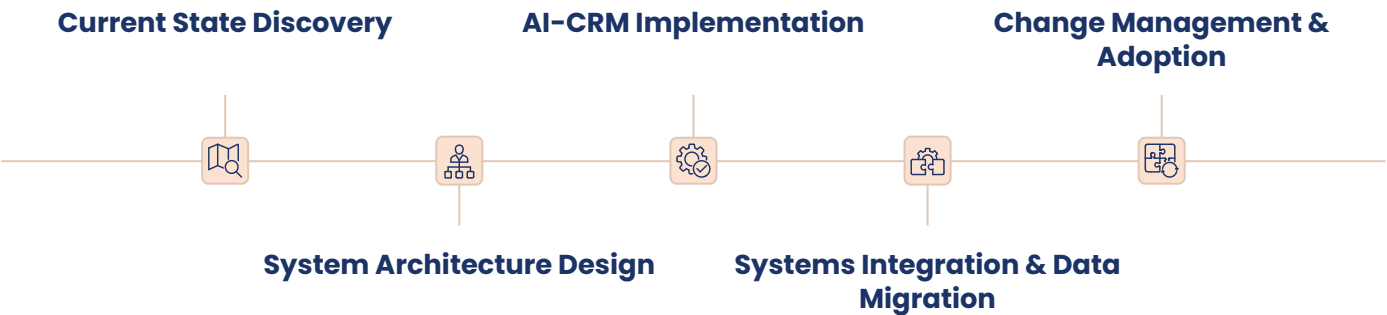
No Real-Time Visibility for Leadership

With no centralized reporting, leadership lacked timely insight into sales, marketing, and service performance across the organization.

Future State & Realized Impact

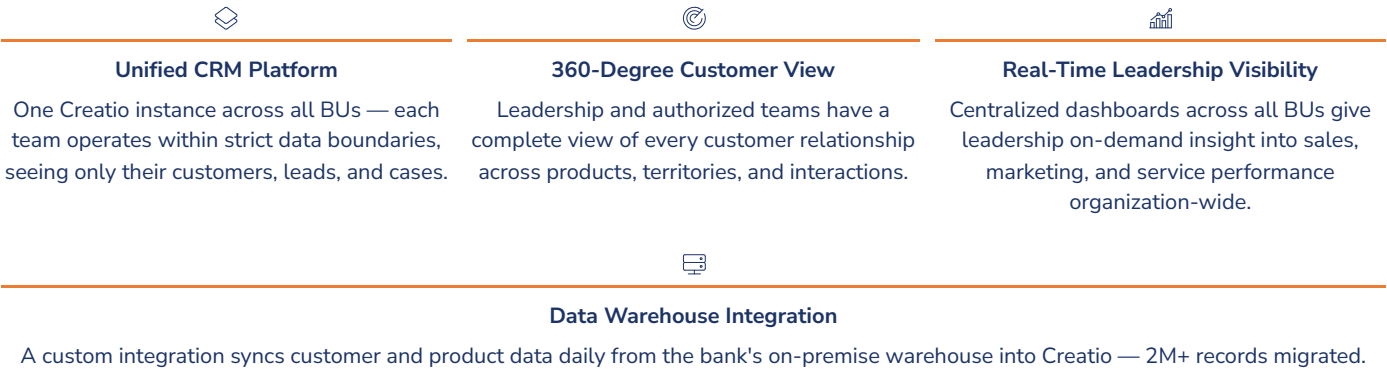
B-TRNSFRMD delivered a phased, SBU-by-SBU Creatio CRM implementation across 7 sprints — unifying Sales, Marketing, and Service operations onto a single enterprise platform.

Strategic Approach



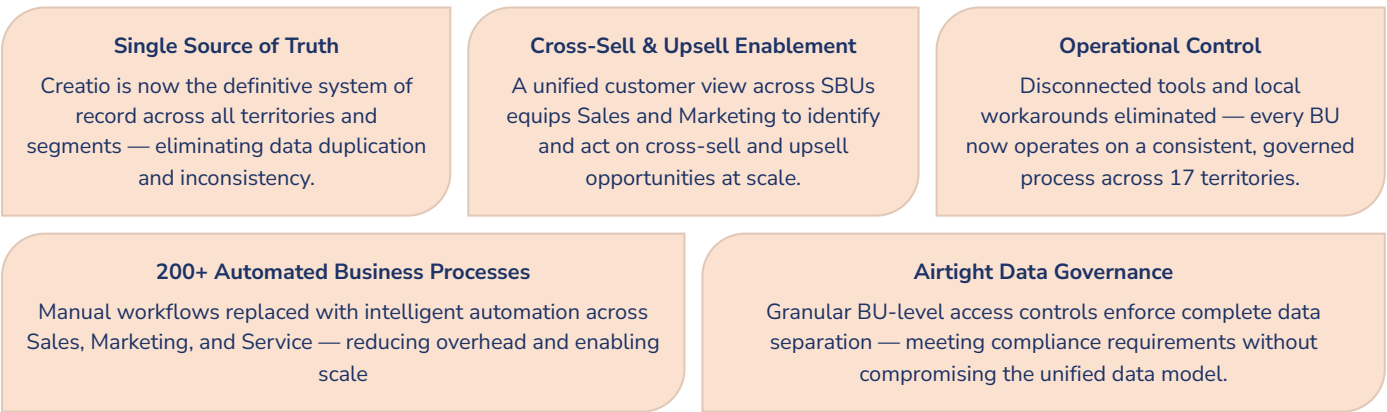
The Solution: A Unified CRM & Operational Platform

A single enterprise-wide platform, purpose-built to unify operations, data, and customer visibility across a complex, multi-territory financial services organization.



Business Outcomes

With the implementation of Creatio CRM, the organization achieved measurable operational and commercial outcomes — reflecting a high-impact transformation at enterprise scale.



About B-TRNSFRMD

B-TRNSFRMD reimagines how organizations deliver Customer and Service Experiences through AI-native technology transformation. As expert partners with ServiceNow, Creatio, Freshworks, and Zendesk, we deliver integrated solutions across Omnichannel CX, CRM, ITSM, and Process Automation. Our proprietary PATH TO OUTCOME™ methodology moves organizations from fragmented technology investments to measurable customer outcomes — from interactions to outcomes, every engagement, every client.

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