Presented By

B-TRNSFRMD

FROM INTERACTIONS TO OUTCOMES

ENTERPRISE CRM COMPARISON GUIDE

A Comprehensive 2026 Guide to Comparing Enterprise CRM Platforms for AI, Automation, Scalability, and Total Cost of Ownership

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1. Platform Architecture & Core Design

Features	Creatio	salesforce	HubSpot	Microsoft
Platform Type	AI CRM + no-code + AI agent platform	Agentforce 360 Platform (multi-cloud)	Smart CRM (hub-based)	CRM + ERP on Dataverse
Core Products	AI CRM, Business Studio, AI Studio, AI Twin	Agentforce Sales, Agentforce Service, Marketing Cloud	Marketing, Sales, Service, Content, Data, Revenue Hubs	Sales, Customer Service, Field Service, Finance
Platform Structure	Single unified platform	Multi-cloud architecture	Hub-based system	Modular (Dataverse)
Workflow Engine	BPMN designer + no-code tools	Flow Builder + Apex	Workflow automation	Power Automate
Data Layer	Native CRM data model	Data 360 (was Data Cloud)	Smart CRM database	Microsoft Dataverse
API Access	REST APIs + connectors	REST / SOAP + MuleSoft	REST APIs	REST APIs, MCP, Python SDK

2. AI Capabilities

Features	Creatio	salesforce	HubSpot	Microsoft
AI Brand	Creatio.ai	Agentforce 360 + Einstein	Breeze	Microsoft Copilot
AI Agents	Available	Agentforce Sales, Service, Account Management	Customer, Prospecting, Data, Content, Social	Sales Agent, Finance Agent, Case Agent
End-User Agent Builder	AI Twin — no skills needed	Agent Builder	Breeze custom agents	Copilot Studio
Agent Lifecycle	AI Studio — full lifecycle at scale	Agentforce Command Center	Agent audit cards	Agent Hub + AI Evaluation Dashboards
Assistant	Native chat assistant	Service Assistant (was Einstein Copilot)	Breeze Assistant (was Breeze Copilot)	Microsoft 365 Copilot
AI Included	Yes — no separate AI licensing	No — priced separately; Data 360 required	Partly — metered by credits	No — Copilot credits

3. Sales Capabilities

Features	Creatio	salesforce	HubSpot	Microsoft
Lead Management	Available	Agentforce Sales	Sales Hub	Dynamics 365 Sales
Pipeline Management	Visual pipeline	Pipeline tools	Pipeline tools	Pipeline tools
Forecasting	AI forecasting	Einstein Forecasting	Forecasting tools	Copilot forecasting
Autonomous Selling	AI Twin + AI Studio agents	Inbound lead gen and nurturing agents	Prospecting Agent	Sales Agent, Sales Research Agent
Sales Automation	No-code workflows	Flow Builder / Apex	Workflow automation	Power Automate
CPQ	Available	Salesforce CPQ	Revenue Hub (Pro tier)	Dynamics 365 Sales + CPQ
Mobile Access	Available	Available	Available	Available

4. Marketing Capabilities

Features	Creatio	salesforce	HubSpot	Microsoft
Campaign Management	Multi-channel campaigns	Marketing Cloud	Marketing Hub	Customer Insights Journeys
Customer Journeys	Journey builder	Journey Builder	Available	Journeys
Segmentation	AI + rule-based	Data 360 segmentation	Available	Dataverse segments
Personalized CX	AI-driven	Einstein / Agentforce	Breeze	Copilot
Content Generation	AI-generated content	Einstein generative	Content Agent	Copilot content
Social Media	Marketplace apps	Add-on	Social Media Agent	AppSource apps
Event Management	Available	Add-on / integrations	Integrations	Available

5. Service Capabilities

Features	Creatio	salesforce	HubSpot	Microsoft
Case Management	Available	Agentforce Service	Service Hub	Customer Service
Knowledge Base	Available	Available	Available	Available
Self-Service Portal	Available	Experience Cloud	Available	Power Pages
Omnichannel Support	Available	Available	Available	Available
Autonomous Resolution	AI Studio agents	Agentforce Service agents	Customer Agent — 65% resolved	Case Management Agent
Routing	AI-based routing	Einstein routing	Rule-based routing	Copilot routing
Field Service	Available	Field Service	Integrations	Field Service

6. No-Code / Low-Code Capabilities

Features	Creatio	salesforce	HubSpot	Microsoft
App Development	No-code Business Studio	Lightning App Builder	Limited tools	Power Apps
Process Designer	BPMN designer	Flow Builder	Workflow builder	Power Automate
Business Rules	Visual builder	Apex required for advanced logic	Limited	Power Platform
No-Code Agents	AI Twin — any end user	Agent Builder — admin-led	Breeze agent setup	Copilot Studio
Citizen Development	Available	Available	Available	Available

7. Data, Analytics & Reporting

Features	Creatio	salesforce	HubSpot	Microsoft
Reporting	Dashboards + reports	Reports + dashboards	Reporting tools	Reports + dashboards
Advanced Analytics	Available	Tableau integration	Custom reports	Power BI, Fabric
Data Platform	CRM-native	Data 360	Smart CRM database	Dataverse + semantic models
AI Insights	Available	Einstein insights	Breeze Intelligence	Copilot insights

8. Integration & Ecosystem

Features	Creatio	salesforce	HubSpot	Microsoft
Marketplace	Creatio Marketplace	AppExchange	HubSpot Marketplace	AppSource
Integration Platform	APIs + connectors	MuleSoft	Native integrations	Azure Integration Services
Agent Connectivity	Open APIs	Agents in Slack	Microsoft 365 Copilot	MCP servers; Claude, GitHub plugins
Prebuilt Integrations	Available	Available	Available	Available
External Integration	Supported via APIs	Supported via APIs	Supported via APIs	Supported via APIs

9. DevOps & Environment Management

Features	Creatio	salesforce	HubSpot	Microsoft
Sandbox Environments	Available	Available	Limited	Available
CI / CD	Supported	Supported	Not standard	Azure DevOps; deploy from Git
Version Control	Supported	Supported	Not standard	Supported, full audit trails
Release Management	Available	DevOps Center	Limited	Lifecycle Services

10. Security & Compliance

Features	Creatio	salesforce	HubSpot	Microsoft
Data Encryption	At rest and in transit	At rest and in transit	At rest and in transit	At rest and in transit
SSO	Supported	Supported	Supported	Supported
MFA	Supported	Supported	Supported	Supported
AI Audit Trail	Agent activity logs	Einstein Trust Layer audit trail	Audit cards per action	Agent IDs in Dataverse
Compliance	GDPR, SOC 2, HIPAA	GDPR, SOC, ISO, HIPAA	GDPR, SOC 2 & more	GDPR, SOC, ISO, HIPAA

11. Pricing & Licensing Structure

Features	Creatio	salesforce	HubSpot	Microsoft
Pricing Model	$40 / $55 per user, or Unlimited plan	Per user and per cloud	Tiered hubs + credits	Per app / per user
AI Pricing	Included — no add-on	$2 per conversation	$0.50 per resolution	Copilot credits, PAYG
AI Prerequisite	None	Data 360 required	Hub seat required	Dataverse capacity
Modular Licensing	Available	Required	Tier upgrades	Required
Hidden Costs	No add-on dependency	Data 360 licensing; long rollouts	Onboarding fees	Credit overage

12. Enterprise Summary

Features	Creatio	salesforce	HubSpot	Microsoft
Platform Model	Unified AI CRM + no-code	Multi-cloud agentic CRM	Hub-based Smart CRM	CRM + ERP on Dataverse
AI Framework	Creatio.ai, AI Twin, AI Studio	Agentforce 360 + Einstein	Breeze Assistant and Agents	Copilot + Copilot Studio
Automation	No-code + BPMN	Flow Builder + Apex	Workflow tools	Power Platform
Data Layer	Native	Data 360	Smart CRM database	Dataverse
Commercial Model	Unlimited users, agents and scale	Per user + per conversation	Tiered plus outcomes	Per user + credits
Best Fit	Mid-market and large organizations wanting one platform	Large enterprises already on Salesforce	Growth-stage teams in one CRM	Standardized on Microsoft

13. Why Creatio Wins?

AI Included at the Core	• Native AI capabilities included in the platform • No separate AI licensing required • AI Twin lets any employee build agents in minutes
No Limits on Users or Agents	• Unlimited plan removes per-seat and per-agent limits • Human and AI work scales without a cost penalty • Launched 1 May 2026 as Unlimited Enterprise
Full Agent Lifecycle Governance	• AI Studio manages agents end to end at scale • Agents operate inside defined guardrails and rights • No-code agent designers, no development cycle
One Unified Platform	• Sales, marketing and service on one data model • Business Studio extends beyond CRM • Single interface for users and administrators
Process-Driven CRM	• End-to-end workflows across the customer lifecycle • BPMN automation for approvals, routing and tasks • AI embedded into processes, not bolted alongside
Lower Total Cost of Ownership	• 37% lower TCO and 70% faster implementation • 61% faster lead response, 17% less manual entry • Independently verified by Nucleus Research
Faster Time-to-Value	• No-code configuration reduces build time • Prebuilt templates and industry workflows • No custom development required

TRNS FRMD | System Integrator Partner

Enterprise Growth, Simplified

We help mid-market and enterprise organizations streamline operations, unify data, and scale faster with AI, automation, and CRM transformation.

Strategy & Consulting

We define your CRM and process strategy to align teams, standardize operations, and create a scalable foundation on Creatio.

Creatio Implementation

We implement and configure Creatio to match your business workflows using no-code tools, ensuring faster deployment and minimal IT dependency.

Automation & Optimization

We design and optimize workflows using Creatio AI Twin, AI Studio, and no-code capabilities to improve efficiency and execution across teams.

About Our Company

B-TRNSFRMD Consulting LLC helps mid-market and enterprise organizations transform how they connect with their customers across the entire lifecycle—from contact centers to service operations to CRM and the workflows that power them. We implement and optimize modern platforms to unify systems, streamline processes, and improve visibility across teams. Using our PATH TO OUTCOME™ methodology, we guide organizations from fragmented technology investments to measurable business outcomes—driving efficiency, consistency, and better customer experiences at scale.

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