TRNS FRMD

From Interactions to Outcomes.

Customer success story · Banking & Financial Services

Unlocking Revenue Growth:

How One of the Caribbean's Most Prominent Financial Groups Enabled Cross-Sell at Scale, a Unified Customer 360, and AI-Ready Operations Across 17 Territories with AI-Native CRM

Industry:	Headquarters:	Employees:	Platform Implemented:
Banking & Financial Services	Jamaica	2,200+	Creatio AI CRM

At a glance

One of the Caribbean's most prominent financial groups had grown faster than its systems. Each of its five business units ran sales, marketing and service on separate tools, so nobody had the full picture of a customer. We brought all five onto a single Creatio platform, one business unit at a time.

Key metrics

5
business units on one Creatio instance

15
business functions unified

200+
workflows automated

2M+
records migrated

17
territories covered

7
sprints to deliver

The challenge

Every new territory and business unit had added another system, and the customer data was spread across all of them.

01	**No central record**	Each unit managed customers, leads and cases in its own tools.
02	**Duplicate data**	Systems didn't sync, so the same customer existed several times over.
03	**Missed cross-sell**	With no view across units, nobody could see which customers to offer what.
04	**Heavy manual work**	Teams spent their time on data entry and reports instead of customers.
05	**No live visibility**	There was no central reporting on sales, marketing or service.

The solution

One Creatio platform for sales, marketing and service across all five units, with each team seeing only its own data.

One platform, clear boundaries
A single instance for every unit, with access restricted by business unit.

A 360° customer view
Authorized teams see the full relationship across products, territories and interactions.

Live leadership dashboards
Sales, marketing and service performance across the group, on demand.

Daily data warehouse sync
A custom integration brings in customer and product data from the bank's on-premise warehouse every day.

How we delivered it

Seven sprints, rolled out one business unit at a time.

Ready to unlock more value for every customer?

- Want one view of every customer across your business?
- Looking to grow revenue through cross-sell and upsell?
- Need real-time insight, not manual reports?
- Ready to boost efficiency with intelligent automation?
- Looking to unlock agentic AI across sales, marketing and service?

We've helped others get there. Let's talk.

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The results

1. **A single source of truth**
   Creatio is now the system of record in every territory and segment. No more duplicates.
2. **Cross-sell and upsell across the group**
   Sales and marketing can see the whole customer relationship and act on it.
3. **One way of working**
   Local workarounds are gone. Every unit follows the same governed process across 17 territories.
4. **200+ processes automated**
   Manual steps in sales, marketing and service replaced with automated workflows.
5. **Compliance built in**
   Access controls by business unit keep data separate while everyone works from one shared model.

About B-TRNSFRMD

B-TRNSFRMD reimagines how organizations deliver Customer and Service Experiences by designing and implementing AI-native technology transformation. As expert partners with ServiceNow, Creatio, Freshworks, and Zendesk, we provide 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 — that is the journey we deliver, every engagement, every client.

B TRNS FRMD
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OUR TECHNOLOGY PARTNERS

Creatio · freshworks · zendesk · servicenow · NiCE · ZOOM · RingCentral · Microsoft

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