

The 2025 CRM BUYER'S GUIDE

Choosing the Right Platform for Your **Growth**

A decision-making framework for Sales,
Service & Marketing Leaders



**BUSINESS
EXPERIENCE TRANSFORMED**

**Fueled by AI, No-Code and Automation
to accelerate revenue growth and
service excellence**

**Presented by
B-TRNSFRMD CONSULTING LLC**
btrnsfrmd.com

Contents Copyright B-TRNSFRMD Consulting,
2025. Do not reproduce without permission.
Product names & logos are copyrights of
respective owners.



Introduction

In today's hyper-competitive market, a CRM is no longer just a contact database — it's the **nerve center of your revenue operations**. The right platform doesn't just store data; it **connects marketing, sales, and service into one unified growth engine**.

A MODERN CRM SHOULD EMPOWER YOU TO:

- Build and maintain **rich, intelligent customer profiles** with data from every interaction
- Run **targeted, multi-channel marketing campaigns** that drive measurable engagement
- Qualify and convert sales leads faster with structured, **data-driven pipelines**
- Automate workflows across sales, service, and back-office functions
- Deliver exceptional customer experiences across every touchpoint

But here's the challenge: **Business moves faster than traditional CRMs can adapt**. In many organizations, marketing needs a new campaign workflow next week, sales needs a custom pipeline today, and service needs to change case routing by tomorrow. In a code-heavy CRM, every change means waiting for IT or external developers — adding cost, complexity, and delay.

This is where low-code CRM platforms like Creatio are changing the game. With visual, drag-and-drop process builders and no-code configuration tools, your business teams can:

- Launch a new campaign in hours, not weeks
- Adjust sales qualification rules instantly to respond to market shifts
- Add or modify service workflows without touching a single line of code

Low-code turns CRM from a static system into a **living, evolving platform** — one that grows and changes at the pace of your business.

THIS BUYER'S GUIDE WILL HELP YOU:

- Understand the **core capabilities** every CRM must deliver in 2025
- Learn how to evaluate platforms across **functionality, flexibility, and long-term ROI**
- Compare leading CRMs — including Creatio, Salesforce, HubSpot, Microsoft Dynamics, and SugarCRM — on what really matters
- Identify how low-code can give you a **competitive advantage** in speed, cost efficiency, and innovation



**Choosing the right CRM isn't about buying software.
It's about future-proofing your ability to grow.**

How to Evaluate CRM Platforms

10-Point Framework

When evaluating a CRM, it's critical to assess both **technical flexibility** and **business impact** across sales, marketing, and service operations. Use this **10-point checklist** as your decision-making guide.

1. Functional Fit & Industry Relevance

- Covers core pillars: **contact intelligence, sales pipeline, marketing automation, customer service, and analytics**
- Offers **industry-specific templates** (e.g., BFSI, healthcare, manufacturing, retail)
- Adapts workflows quickly to evolving processes

2. Low-Code / No-Code Capabilities (Key Differentiator)

- Enables business teams to **design and deploy workflows without coding**
- Includes visual builders for forms, processes, dashboards, and campaigns
- Reduces IT backlog and accelerates go-live for new initiatives

3. Contact Intelligence & Data Enrichment

- Captures and enriches data from multiple channels automatically
- Integrates with LinkedIn, ZoomInfo, Clearbit, and other data sources
- Maintains a **360° customer history** across interactions, deals, tickets, and campaigns

4. Sales Process Management & Qualification

- Supports lead scoring, qualification frameworks (BANT, MEDDIC), and automated nurturing
- Allows **customizable pipelines** per product, territory, or business unit
- Provides real-time forecasting and performance tracking

5. Marketing Campaigns & Automation

- Runs multi-channel campaigns (email, SMS, social, ads) directly from the CRM
- Offers segmentation, personalization, and A/B testing tools
- Ties campaign results directly to opportunities and revenue impact

6. Process Automation & BPM

- Includes an integrated BPM engine for **end-to-end workflow automation**
- Triggers actions across sales, service, and marketing based on events or conditions
- Provides prebuilt templates to speed adoption



7. Integration & Ecosystem

- Offers native connectors for ERP, service desk (e.g., Freshservice), marketing automation, telephony, and BI tools
- Has a marketplace for extensions and vertical-specific add-ons
- Supports robust APIs and middleware for custom integrations

8. AI, Analytics & Reporting

- Delivers AI-powered recommendations, lead scoring, and churn prediction
- Enables self-service dashboards and reports for sales, marketing, and service teams
- Provides real-time, role-based reporting

9. Cost Structure & Licensing Flexibility






- Clearly defined TCO over 3–5 years (licenses, implementation, training, integrations, maintenance)
- Scales users, features, and modules without penalty
- Includes automation, AI, and analytics without hidden fees

10. Security, Compliance & Vendor Lock-In

- Meets GDPR, HIPAA, SOC 2, and local data law requirements
- Allows full export of data and configurations without penalties
- Uses open standards to avoid proprietary lock-in

CRM Platform Comparison

2025 Snapshot

Criteria					
No-Code Customization	Best-in-class visual builders for workflows, forms, dashboards; no IT dependency	Developer-heavy customization; Apex coding required	Limited customization ; basic workflow automation	Requires technical expertise for changes	Moderate flexibility; some visual tools
Contact Intelligence & Data Enrichment	360° profiles, multi-channel capture, data enrichment integrations (LinkedIn, ZoomInfo)	Strong contact view, robust enrichment via AppExchange	Basic enrichment; strong for inbound marketing	Deep data management with add-ons	Decent enrichment via integrations
Sales Process Management	Fully customizable pipelines, lead scoring, MEDDIC/BANT support	Comprehensive sales process tools	Designed for SMB inbound sales; limited enterprise complexity	Enterprise-grade sales management	Solid for SMB/mid-market
Marketing Campaigns & Automation	Multi-channel, segmentation, personalization, A/B testing	Strong; best with Marketing Cloud (extra cost)	Excellent inbound marketing automation	Limited native campaigns; relies on integrations	Basic campaigns
Process Automation & BPM	Integrated BPM engine across sales, service, and marketing	No native BPM; relies on third-party tools	Limited automation scope	Some automation; less visual	Moderate automation features

Integration & Ecosystem	Native connectors (ERP, Freshservice, telephony, BI) + open APIs	Massive AppExchange ecosystem	Smaller ecosystem; strong with HubSpot tools	Tight Microsoft stack integration	Smaller app marketplace
AI, Analytics & Reporting	AI recommendations, self-service dashboards, real-time analytics	Strong AI/Einstein analytics	Limited AI; strong reporting for marketing	Robust AI and reporting	Decent reporting; basic AI
Cost Efficiency (TCO)	High — flexible licensing, low-code reduces dev costs	High license & dev costs	Medium — affordable but feature gaps at scale	High costs for enterprise	High — lower licensing, moderate features
Time-to-Value	Weeks with prebuilt templates and low-code setup	Months due to complexity	Weeks for SMB deployment	Months for enterprise setups	Moderate
Vendor Lock-In Risk	Low — open standards, portable data/workflows	High — proprietary code and structures	Medium — proprietary workflows	High — Microsoft dependency	Low — open-source options

- Strength** - Clear advantage in most use cases
- Neutral** - Adequate but not leading
- Weakness** - Significant limitation or trade-off



Analyst Speaks

CRM Market Outlook (2025)

Forrester Wave™: CRM Software for Financial Services, Q1 2025

Recognized **Creatio** as one of the top-rated platforms for **composable architecture and industry-specific workflows** in regulated sectors. Analysts praised its ability to enable financial institutions to rapidly adapt processes without coding. Other strong performers in the report included Microsoft, Salesforce, and BUSINESSNEXT.

Forrester Wave™: Low-Code Platforms for Business Developers, Q1 2024

Rated Creatio among the leaders in enabling business-led application development, with particular strength in unifying CRM, BPM, and no-code tools in a single environment. Salesforce, ServiceNow, and Microsoft were also noted as leaders for enterprise-grade capabilities.

Gartner Magic Quadrant for Low-Code Application Platforms, 2024

Positioned Creatio in the Visionaries quadrant for its unified no-code platform that allows both technical and non-technical teams to design workflows, dashboards, and automations. Gartner highlighted Creatio's strength in adaptability and speed to market, alongside Salesforce and Microsoft in the leadership spectrum.

IDC MarketScape: Worldwide CRM Applications 2025 Vendor Assessment

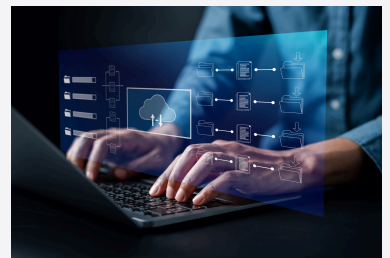
Acknowledged Creatio for its strong adaptability, AI-enabled automation, and embedded omnichannel capabilities — positioning it among the most agile platforms for both mid-market and enterprise deployments. IDC also noted increasing adoption across industries where rapid digital transformation is a priority.

The Analyst Takeaway

Across multiple evaluations, Creatio is repeatedly recognized for:

- **No-code adaptability** that empowers business teams to implement changes without IT bottlenecks
- **Unified CRM + process automation** to manage sales, marketing, and service in one platform
- **Industry-specific capabilities** that shorten time-to-value in sectors like financial services, manufacturing, and healthcare

While other vendors such as Salesforce, Microsoft, and ServiceNow excel in ecosystem breadth and enterprise penetration, Creatio stands out in analyst reports for its **speed, flexibility, and unified architecture** — traits increasingly valued in a fast-changing business environment.



Sources

- Forrester Wave™: CRM Software for Financial Services, Q1 2025
- Forrester Wave™: Low-Code Platforms for Business Developers, Q1 2024
- Gartner Magic Quadrant for Low-Code Application Platforms, 2024
- IDC MarketScape: Worldwide CRM Applications, 2025 Vendor Assessment

The Creatio Advantage

In today's market, speed and adaptability are more than IT features — they are **business survival skills**. While every organization's CRM priorities differ, industry analysts and enterprise adopters consistently highlight Creatio for its ability to deliver **enterprise-grade power without enterprise-level complexity**.

At the heart of Creatio is its true **No-Code architecture** — a platform where business teams can design, deploy, and refine processes in hours, not months, without writing a single line of code. This empowers organizations to evolve their CRM at the pace of the market, without costly developer bottlenecks or long release cycles.



Why Leading Organizations Choose Creatio



▶ No-Code Speed & Flexibility

Build and adapt workflows, campaigns, dashboards, and analytics through an intuitive drag-and-drop interface — cutting project timelines by up to 70%.

▶ CRM + BPM in a Single Platform

Seamlessly orchestrate sales, marketing, and service processes, while automating back-office workflows for true end-to-end operational efficiency.

▶ 360° Contact Intelligence

Capture, unify, and enrich customer data from every channel — giving teams a complete, real-time view that drives smarter decisions and more relevant engagement.

▶ Sales & Marketing Alignment

Create tailored pipelines, apply advanced qualification frameworks, and run multi-channel campaigns — all linked to measurable revenue outcomes.

▶ Fast Time-to-Value, Lower TCO

Pre-built templates, no-code tools, and native integrations slash implementation costs while delivering ROI in months, not years.

▶ Openness & Freedom

Leverage open APIs, export data on demand, and avoid vendor lock-in with a platform designed for long-term flexibility and independence.

The ROI in Action

Organizations using Creatio report:

- **Faster Go-Lives** — Launch new processes up to 3x quicker than traditional CRM deployments
- **Lower Costs** — Reduce total cost of ownership by 30–50% through no-code configuration and built-in automation
- **Higher Adoption Rates** — Business-led customization ensures the CRM fits user needs from day one

For enterprises where agility drives competitive edge, **Creatio delivers the adaptability of No-Code innovation with the robustness of an enterprise CRM** — ensuring your technology never slows down your strategy.



The Creatio Impact Across All Industries

Case Study 1

BSN Sports

Challenge: Needed to manage complex sales operations across thousands of reps, unify processes, and drive national growth with efficiency.

Solution: Adopted Creatio's no-code CRM to centralize sales activities, automate pipeline management, and provide visibility across distributed teams.

Impact:

- 100% adoption rate across 3,000 users
- 60% sales growth after implementation
- Streamlined operations with unified sales processes

Case Study 2

First United Bank & Trust

Challenge: Required a modern CRM to consolidate customer data, improve sales and service efficiency, and empower relationship managers with better insights.

Solution: Implemented Creatio CRM to provide a 360° customer view, automate client onboarding, and integrate with existing core banking systems.

Impact:

- Enhanced relationship management with unified client profiles
- Improved operational efficiency across sales and service teams
- Stronger ability to deliver personalized, customer-centric experiences

Case Study 3

Heritage Insurance

Challenge: Faced inefficiencies in policy administration and claims handling, with siloed systems limiting visibility and slowing response times.

Solution: Deployed Creatio's no-code platform to automate policy management, claims processing, and customer communications while integrating disparate systems.

Impact:

- Faster claims resolution times, improving customer satisfaction
- Streamlined policy administration with reduced manual work
- Increased agility in launching new insurance products

Case Study 4

Cornerstone Bank

Challenge:

Needed to improve client onboarding, lending processes, and customer data management while ensuring compliance and scalability.

Solution:

Leveraged Creatio's CRM and BPM capabilities to automate account opening, lending workflows, and integrate real-time customer insights across systems.

Impact:

- Reduced onboarding time for retail and commercial customers
- Increased lending efficiency with automated approvals
- Strengthened compliance and data governance processes



KEY TAKEAWAYS

- **Speed:** Up to **75% faster processes** across sales, service, and marketing
- **Adaptability:** Business-led no-code configuration reduces IT dependency
- **ROI:** Measurable gains in conversion rates, efficiency, and campaign performance
- **Cross-Industry Success:** Financial services, healthcare, retail, manufacturing, and public sector all report faster time-to-value



BUSINESS EXPERIENCE TRANSFORMED

Fueled by AI, No-Code and Automation to accelerate revenue growth and service excellence

Creatio Integrator Partner

Our Creatio offerings include

- Discovery and Design
- Program management
- Platform Implementation
- Integrations and custom app development
- License Optimization
- Managed support

Partner with B-TRNSFRMD to unlock the full potential of AI & Omnichannel innovations for increased customer satisfaction and improved service delivery.

Our Solution Portfolio

Omnichannel CX/CRM | Service Desk | Process Automation | Analytics

Learn more about us at

<https://btrnsfrmd.com/creatio/>

Or email us at

success@btrnsfrmd.com

Schedule a Meeting!

