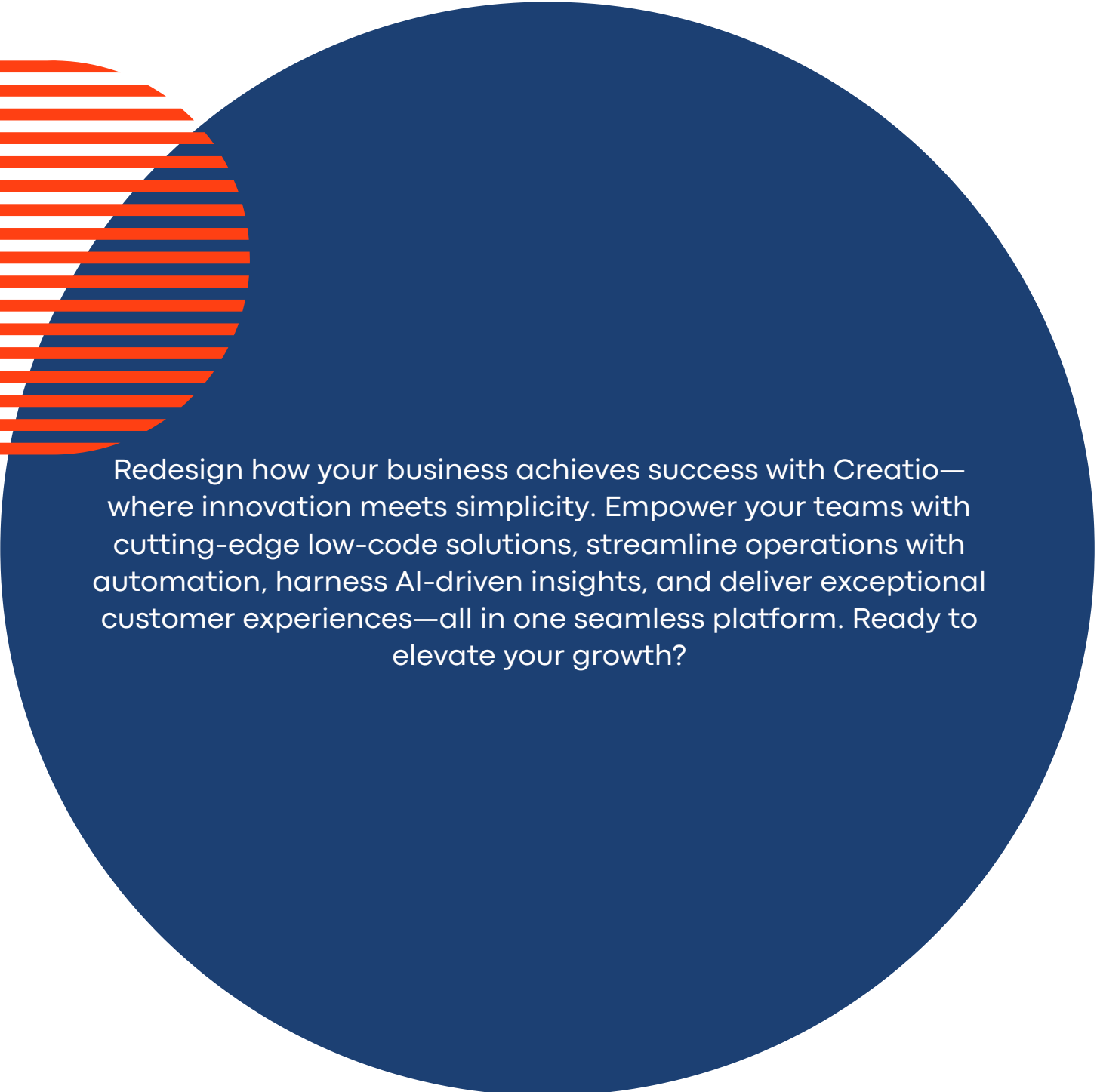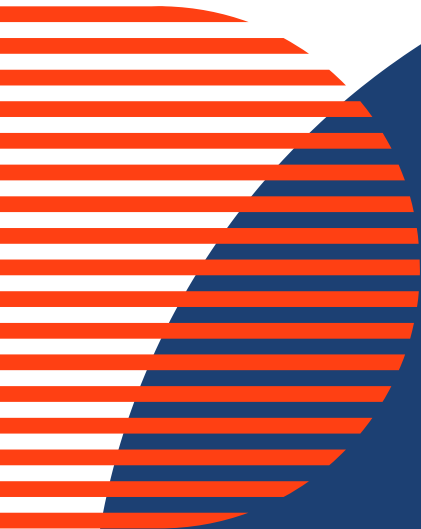**TRNS FRMD**

https://btrnsfrmd.com/

Creatio
Data Sheet

Presented by:

B-TRNSFRMD Consulting LLC.
January 2025

Redesign how your business achieves success with Creatio—where innovation meets simplicity. Empower your teams with cutting-edge low-code solutions, streamline operations with automation, harness AI-driven insights, and deliver exceptional customer experiences—all in one seamless platform. Ready to elevate your growth?

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Customer Problems Solved

Sales Challenges Solved by Creatio:
- Automates data entry and routine tasks to save time.
- Helps prioritize leads with AI insights.
- Creates personalized outreach for better engagement.

Marketing Challenges Solved by Creatio:
- Simplifies campaign management in one platform.
- Uses AI to segment audiences for targeted messaging.
- Tracks campaign performance in real-time.

Customer Service Challenges Solved by Creatio:
- Speeds up responses with automated case routing.
- Provides tools for quick and accurate issue resolution.
- Ensures consistent support across all channels.

Workflow Challenges Solved by Creatio:
- Automates repetitive tasks to improve efficiency.
- Monitors processes for better performance tracking.
- Scales easily to support business growth.

Creatio helps businesses save time, improve customer satisfaction, and grow with smarter automation and insights.

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Key Product Modules

No-Code Platform

Studio Creatio:

- **No-Code Development:** Enables users to build applications, automate workflows, and customize processes without requiring coding knowledge.
- **Composable Architecture:** Provides reusable components to quickly assemble apps tailored to specific business needs.
- **Visual Process Designer:** Drag-and-drop tools to model, analyze, and execute business processes in a visual format.
- **Workflow Automation:** Automates repetitive tasks and streamlines processes across different departments.
- **Business Process Management (BPM)**: Offers tools to map, optimize, and manage complex business workflows.
- **Extensibility:** Integrates seamlessly with external systems through open APIs and connectors.

Creatio AI:

- **Predictive Analytics:** AI-driven insights to anticipate customer behavior and optimize processes.
- **Process Recommendations:** Provides suggestions for process improvements based on historical data and AI analysis.
- **Natural Language Processing (NLP):** Enables sentiment analysis, customer communication insights, and chatbot capabilities.

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Key Product Modules

CRM Applications

Marketing Creatio:

- **Omnichannel Marketing:** Centralizes email, social media, events, and offline campaigns for consistent messaging across all touchpoints.
- **Customer Journey Management:** Tracks and optimizes each stage of the customer journey.
- **Segmentation and Targeting:** Dynamically segment leads and customers based on behavior, demographics, and preferences.
- **Campaign Management:** Design, execute, and measure campaigns with pre-configured templates and analytics tools.
- **Lead Scoring and Nurturing:** AI-based scoring models help prioritize leads; automated workflows nurture leads through the funnel.

Sales Creatio:

- **360° Customer View:** Consolidates customer data (contacts, history, interactions) for a comprehensive perspective.
- **Lead Management:** Automates lead qualification and distribution based on predefined rules.
- **Opportunity Management:** Tracks deals, stages, and potential revenue in real time.
- **Sales Forecasting:** AI-powered tools for accurate pipeline forecasting and trend analysis.
- **Order and Contract Management:** Simplifies the creation and tracking of sales contracts and purchase orders.
- **Performance Analytics:** Provides dashboards and reports to monitor team performance and sales metrics.

Service Creatio:

- **Case Management:** Tracks, prioritizes, and resolves customer cases efficiently with automation tools.
- **Omnichannel Communications:** Integrates all communication channels, including email, chat, phone, and social media.
- **Service Level Agreements (SLAs):** Configures and tracks SLAs to ensure timely service delivery.
- **Knowledge Management:** Centralized repository for storing FAQs, manuals, and service guides to aid agents.
- **Customer Portal:** Self-service tools for customers to log cases, find answers, and interact with support.
- **Performance Monitoring:** Tracks key service metrics, like response and resolution times, to measure efficiency.

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Unique Features

- **No-Code Platform:** Creatio's no-code platform empowers users to design and automate workflows without traditional coding, enabling rapid application development and customization.

- **Composable Architecture:** This architecture allows organizations to assemble applications from interchangeable components, enhancing flexibility and scalability in solution development.

- **Integrated AI Capabilities:** Creatio AI combines prescriptive, generative, and agentic AI to provide intelligent automation, offering features like predictive analytics, content generation, and autonomous task execution.

- **Freedom UI Designer:** A modern interface design tool that enables users to create intuitive and personalized user experiences without coding.

- **Unified CRM Suite:** Creatio offers a comprehensive CRM suite that includes Marketing, Sales, and Service applications, all built on a single platform to ensure seamless integration and data consistency.

Unified Platform Benefits

- **Integration:** All modules work seamlessly together, enabling a unified experience across marketing, sales, and service functions

- **Scalability:** Designed to grow with the organization, accommodating increased user numbers, data, and process complexity.

- **Customization:** Allows tailored solutions for industries like finance, healthcare, retail, and more.

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How does Creatio use AI?

Key Components in Creatio:

- **Prescriptive AI:** Assists users in making informed decisions by analyzing data and providing actionable recommendations. For instance, it can suggest the next best actions for a sales opportunity based on historical data and engagement patterns.

- **Generative AI:** Automatically creates content such as personalized emails, meeting summaries, or marketing copy tailored to specific customer segments, streamlining communication and marketing efforts.

- **Agentic AI:** Executes tasks autonomously on behalf of the user, such as scheduling follow-up meetings or updating CRM records based on predefined triggers and conditions, reducing manual workload.

AI Tools and Features:

- **Creatio Copilot:** A centralized workspace that allows users to configure and deploy generative AI use cases for CRM and AI-assisted app development. It offers out-of-the-box AI scenarios and enables the creation of custom AI use cases through intuitive no-code interfaces.

- **AI Skills:** Specific capabilities within Creatio AI that enable intelligent automation across various business scenarios. These skills can be configured, customized, and extended without coding, allowing businesses to tailor AI functionalities to their unique needs.

- **AI Command Center:** Provides centralized tools for managing all AI capabilities within Creatio, allowing users to monitor, configure, and optimize AI-driven workflows from a single interface. It enables real-time visibility into the performance and usage of various AI Skills,

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Creatio Copilot

Key Features

- **Conversational Intelligence:** Creatio Copilot functions as a smart virtual assistant, leveraging generative AI to understand natural language and streamline task completion with human-like responses.

- **No-Code Enablement:** Empowers no-code creators with a dedicated workspace to design, deploy, and optimize AI-driven use cases effortlessly, boosting innovation and efficiency.

- **Business Optimization:** Offers intelligent suggestions for templates, next-best actions, process designs, and application generation, helping businesses enhance productivity and decision-making.

- **Tailored Use Cases:** Designed to address specific needs across sales, marketing, and service functions, with features like opportunity scoring, campaign flow design, sentiment analysis, and personalized customer recommendations.

- **Robust Data Privacy:** Guarantees that customer data is securely handled, not stored by external providers, and fully compliant with access rights and data security protocols.

Transform your business with the power of Creatio Copilot—streamline operations, accelerate innovation, and drive exceptional results!conditions, reducing manual workload.

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Creatio AI Skills

Key Features

- **No-Code AI Skill Development:** Create and deploy AI-driven functionalities using natural language without any coding. This feature empowers employees across all levels to implement AI solutions effortlessly, fostering innovation and accessibility.

- **Unified AI Architecture:** Integrates prescriptive, generative, and agentic AI into a single platform. This cohesive design simplifies the development, deployment, and management of AI Skills for streamlined automation across diverse business needs.

- **AI Command Center:** A centralized hub to manage and monitor all AI Skills. It provides visibility into usage, tools for access control, and scalability options, ensuring optimized AI operations and seamless integration.

- **Pre-Built AI Skills:** Offers a collection of over 20 ready-to-use AI Skills designed for processes in sales, marketing, and customer service. These pre-configured skills enable intelligent automation to reduce friction, improve efficiency, and enhance customer engagement.

- **Comprehensive AI Skill Components:** Each AI Skill consists of two parts—prompts, which define the tasks for the AI, and actions, which break down the steps required to complete the task. This structured approach ensures clear and accurate results.

- **Transparent Cost Structure:** All AI features are included in the base software license, with bundled consumption for commonly used scenarios. This eliminates hidden fees and simplifies cost management for businesses.

Elevate your business with Creatio AI Skills—streamline operations, enhance efficiency, and customize AI capabilities to perfectly align with your unique objectives!

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Creatio AI Command Center

Key Features

- **Unified AI Management:** The AI Command Center integrates all AI capabilities into a single platform, combining prescriptive, generative, and agentic AI to enable streamlined design, deployment, and refinement of AI-driven workflows.

- **Real-Time Monitoring:** Offers comprehensive tools to monitor the performance and usage of AI Skills, providing real-time visibility and insights to optimize AI-driven operations.

- **No-Code Configuration:** Allows users to create, configure, and manage AI Skills without coding, making it accessible to non-technical team members and promoting broader adoption.

- **Scalability and Access Management:** Facilitates seamless scalability of AI Skills while providing robust access controls to manage permissions and ensure secure operations.

- **Pre-Built AI Capabilities:** Includes pre-configured AI Skills tailored for sales, marketing, and customer service functions, enabling businesses to deploy intelligent automation rapidly and effectively.

Centralize your AI operations with Creatio's AI Command Center—monitor, optimize, and scale your AI workflows effortlessly to drive innovation and achieve business excellence!

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Gartner Reviews

Enterprise Low-Code Application Platforms (2023):

Creatio was recognized as a Visionary in the 2023 Gartner® Magic Quadrant™ for Enterprise Low-Code Application Platforms. This distinction highlights Creatio's innovative approach to simplifying and accelerating application development. Its intuitive no-code/low-code platform empowers organizations to create scalable, customized applications without requiring extensive programming knowledge, making it a key player in the enterprise low-code market.

B2B Marketing Automation Platforms (2023):

Creatio earned the position of Leader in the 2023 Gartner® Magic Quadrant™ for B2B Marketing Automation Platforms. This recognition underscores Creatio's ability to deliver comprehensive, AI-driven solutions for automating B2B marketing campaigns, enhancing lead generation, and nurturing customer relationships. Creatio's platform enables businesses to optimize marketing efforts through advanced segmentation, personalized content creation, and real-time performance analytics.

Sales Force Automation (2023):

Creatio was named a Challenger in the 2023 Gartner® Magic Quadrant™ for Sales Force Automation. This placement reflects its growing influence in the sales automation space, offering tools to streamline lead management, automate workflows, and provide actionable sales insights. By focusing on usability and efficiency, Creatio equips sales teams with the capabilities to boost productivity and close deals more effectively.

Significance of These Recognitions:

These accolades from Gartner highlight Creatio's innovative and customer-centric approach across multiple domains. Its solutions empower businesses to achieve operational excellence by automating processes, enhancing customer engagement, and driving growth. Whether it's through its low-code application development, marketing automation, or sales force automation tools, Creatio continues to prove itself as a trusted partner for organizations aiming to modernize and optimize their operations.

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Forrester Reviews

Customer Service Solutions Report (Q1 2024):
Creatio was recognized in the Forrester Wave™ for its exceptional ability to provide advanced customer service solutions. By leveraging AI and workflow automation, Creatio enables organizations to streamline case management, deliver faster response times, and ensure personalized interactions, helping businesses improve customer satisfaction and retention.

Low-Code Platforms for Citizen Developers (Q1 2024):
Creatio was named the only Leader in the 2024 Forrester Wave™ for Low-Code Platforms for Citizen Developers. This accolade highlights Creatio's unparalleled ability to empower non-technical users—referred to as citizen developers—to build and deploy applications through its intuitive, no-code/low-code platform. This capability allows businesses to innovate faster, reduce IT backlogs, and customize processes without extensive programming expertise.

Financial Services CRM (Q3 2023):
Creatio was designated a Strong Performer in the Forrester Wave™ for Financial Services CRM. Its tailored CRM capabilities cater specifically to the financial sector, providing tools for managing client relationships, improving operational efficiency, and enhancing customer engagement. Creatio's solutions are particularly effective in enabling banks, insurance companies, and financial institutions to deliver exceptional client experiences.

Sales Force Automation (Q3 2023):
Recognized as a Strong Performer in the Forrester Wave™ for Sales Force Automation, Creatio provides comprehensive solutions for sales management. Its platform automates lead prioritization, pipeline tracking, and reporting, enabling sales teams to focus on closing deals while improving productivity. These tools make it easier for businesses to optimize sales processes and meet revenue goals.

Financial Services CRM Landscape (Q2 2023):
Creatio was highlighted for its strong capabilities in the financial services CRM market. Its platform supports relationship management, lead nurturing, and customer data consolidation, empowering financial institutions to adopt customer-centric strategies that drive growth and build long-term loyalty. This recognition underscores Creatio's ability to adapt to the unique demands of the financial sector.

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Success Stories

Advanced Micro Devices (AMD)

AMD utilizes Creatio's low-code platform to automate and optimize its customer relationship management workflows, improving process efficiency, reducing manual tasks, and achieving more personalized and timely customer engagement

MetLife

MetLife employs Creatio to automate workflows and improve operational effectiveness, leading to better service delivery and customer satisfaction.

Coca-Cola

Coca-Cola leverages Creatio's solutions to automate workflow processes, improve data-driven decision-making, and streamline customer interactions, resulting in faster response times and enhanced customer experience.

Hershey Creamery Company

By implementing Creatio, Hershey Creamery Company transitioned from paper-based records to a digital CRM system, resulting in a 165% return on investment and payback within 8 months. This modernization enhanced sales productivity, reduced administrative overhead, and improved data-driven decision-making.

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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-TRNSFMRD to Unlock the full potential of AI & Omnichannel innovations for increased customer satisfaction and improved service delivery.

Our Solution Portfolio - Omnichannel CX - Cloud Contact centers - Service Desk - Analytics

Schedule a Meeting!

Learn more about us at
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