



## Creatio – the freedom to change

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Composable architecture gives businesses the freedom to adapt rapidly and stay relevant to their customers

Composable  
architecture



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The Art of Persistent Relevance

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## About this report

In this report, CX-Create’s founder and Chief IT industry analyst, Jeremy Cox, explores the business context that makes Creatio’s No-Code CRM platform such a compelling proposition for enterprises in many industries. He also provides an overview of the platform’s composable no-code architecture and a summary of the guidance offered by the vendor to enable clients to take full advantage of this innovative platform.

CX-Create is an independent IT industry analyst and advisory firm. Its founder, Jeremy Cox, has taken a keen interest in what it takes to sustain relevance to customers (the lodestone of

business success) since the mid-1980s. He draws on experience in marketing, sales, and strategy consulting at IBM throughout the 1990s, as a principal consultant in CRM transformation at KPMG Consulting, as an IT industry analyst at Omdia (formerly Ovum), and as an independent analyst since establishing CX-Create in January 2021.

## Highlights:

- Accelerating change and the imperative to adapt continuously underpin the appeal of Creatio's No-Code Platform
- Creatio's composable architecture underpinning the No-Code CRM Platform provides freedom for rapid adaptation and innovation
- CX-Create's viewpoint – Creatio provides an effective and affordable platform for rapid adaptation

## Accelerating change and the imperative to adapt continuously underpin the appeal of Creatio's No-Code Platform

Volatility, uncertainty, complexity, and ambiguity (VUCA coined by the US Army War College in 1987) have never been more apt. Figure.1 summarizes the current VUCA state. We are all aware of disruptive forces and evermore compressed timescales within which to adapt and transform enterprise capabilities to keep up with accelerating change.

The pandemic amplified the need to enhance digital customer engagement to offer customers alternatives to physical stores during numerous lockdowns – boosting e-commerce. It impacted employees who needed remote collaborative means of working, providing a major boost for collaborative platforms such as Zoom, Slack, and Teams. Supply chains were massively disrupted while businesses scrambled for alternative sources.

The illegal Russian invasion of Ukraine, inflicting immense suffering on the Ukrainian people, has also had a colossal impact on energy prices, causing governments to scramble for alternative supplies, forcing prices still higher and generating inflationary forces that threatened to delay post-pandemic economic recoveries. In response, many businesses have curtailed major investments and shifted their focus and outlook from opportunities for growth to cost reduction. Caught by surprise and increasingly concerned investors, many high-profile companies have made thousands, if not tens of thousands, of employees redundant.

Simultaneously other macro forces are at play, not least the threat of cataclysmic climate change and the drive for clean energy, waste management, and sustainability, enshrined in the outputs from COP 26 and COP 27. Diversity and equality have been added to sustainability, increasing the pressure on enterprises to embrace environmental, social, and corporate governance (ESG). Willing or not, the EU is close to finalizing the Non-Financial Reporting Directive (NFRD), making

it mandatory for large companies and listed SMEs to prove compliance with agreed standards. The US is following suit. In March 2022, the SEC announced its proposal for sustainable disclosure regulations increasing transparency so investors can factor in non-financial aspects of a company before investing. The ethical investment trend is growing, spawning a new sub-industry of ethical investment services.

This deluge of recent pressures will only continue to impact companies globally. The increasing power of the consumer and the more onerous regulatory environment are forcing companies to change - and fast.

Meanwhile, they must compete with other companies for the fleeting attention span and demands for convenience and near-instant gratification of consumers. At the same time as reducing operational costs, they must step up to the increased expectations of digitally-savvy customers seeking to engage with firms on their own terms.

### Speed matters, but there are many common barriers.

Rapid adaptation is essential to keep up with evermore demanding customers and within diminishing timescales – delays can be the difference between success and failure. However, few companies are equipped for rapid adaptation, especially those behind the curve of digital business transformation.

### Legacy systems, development bottlenecks, and a siloed and incoherent transformation approach are some of the common barriers to rapid adaptation

While SaaS applications have existed for over two decades, many companies still rely on legacy on-premises systems to run their operations. It is common to find a systems landscape with a mix of on-premises and cloud-based enterprise applications. They are often connected to support cross-enterprise processes such as order-to-cash, procure-to-payment, etc. Many modern SaaS applications are adopted and have limited configurability to suit the company's requirements. They can, however, be deployed faster. This usually means sacrificing customization for cost advantages. Many of the features of such applications may be irrelevant and, therefore, never used, which distracts end users or creates resistance to adoption. If the organization has a software development team to close functional gaps to enhance its capabilities, it may be swamped by competing departmental demands or become a bottleneck impeding the speed of digital business transformation. The result is that the company falls further behind more adaptive competitors that use modern agile methods and more configurable microservices-based applications to spin up new capabilities faster.

Developing capabilities one department at a time is the most significant barrier to progress. This leads to data fragmentation across multiple systems and databases and creates unwanted friction across processes that should span the value chain. CRM is often deployed like this, with marketing, sales, and service departments deploying CRM applications independently, fracturing or even polluting customer data based on their narrow interests. This creates institutional myopia and leads to erratic customer experiences, as customer intent across their interaction journeys remains opaque to the organization – see our blog: [CRM can stunt your growth](#).

## Creatio's composable architecture underpinning the No-Code CRM Platform provides freedom for rapid adaptation and innovation

Two years ago, Creatio embarked on a new product strategy to free enterprises from the traditional constraints of most SaaS platforms. The approach was to atomize its CRM platform, breaking it down into composable microservices that could be recombined to suit the needs of each enterprise. Customer 360 provides the foundation, the real-time well of customer data; transactional, demographic/firmographic, and when connected to the web or via APIs to e-commerce systems, social networks, and all interaction channels, experiential data. The platform is also database agnostic, allowing enterprises to use their preferred technology.

### The composable architecture and no-code platform Studio Creatio enable organizations to adapt the platform to suit their unique needs rapidly

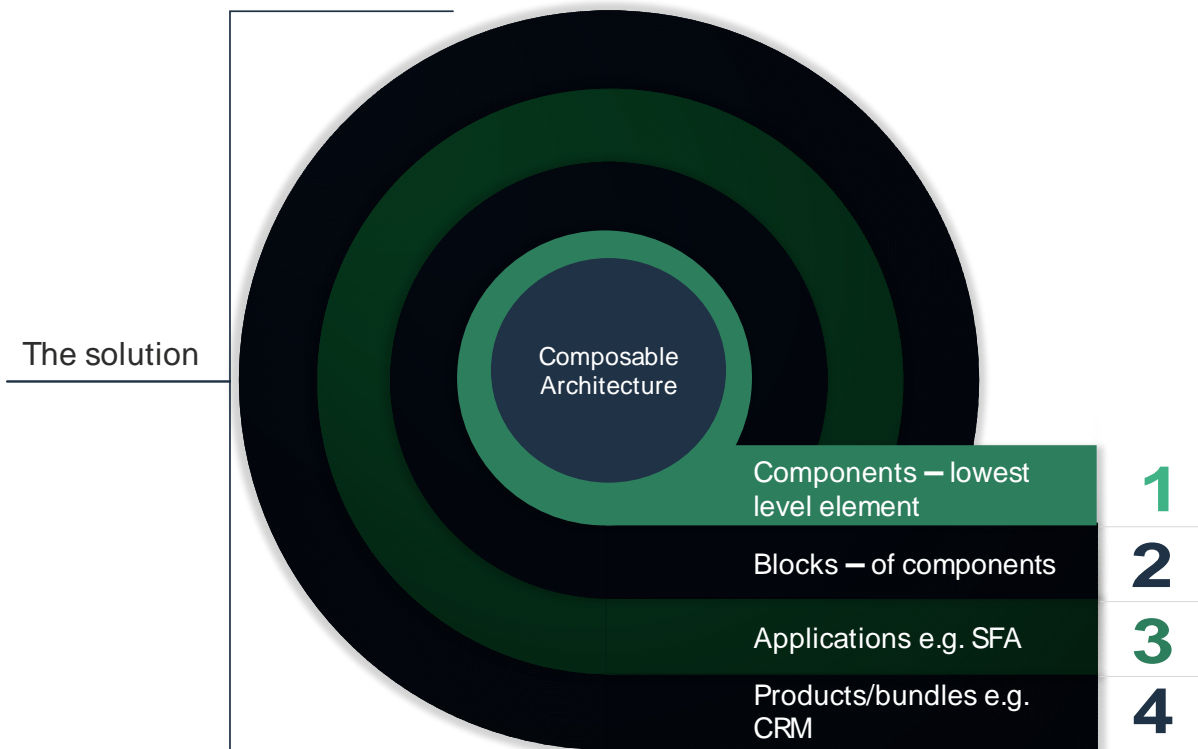
Creatio promotes its platform under the banner of *freedom to own your automation* and with justification. Business leaders, and employees, especially departmental heads, have bemoaned the expense, difficulties, and delays in customizing systems to fit their specific needs. For the sake of speed and uniformity, out-of-the-box standard processes are seen by some as a frustrating compromise.

Creatio's approach is to break down applications into reusable 'packets' of code, like LEGO pieces, that can then be assembled to support the desired functional capabilities without the need for coding except possibly at the lowest component level, as depicted in Figure.1 using Studio Creatio, the Creatio no-code platform. Developers can create entirely new solutions using the platform if they want to.

Typically the development team, which might consist of business domain experts, business analysts, software architects, and developers within the IT team, will start with out-of-the-box industry templates and then adjust the various elements as required. This saves considerable time in reinvention but also provides the freedom to augment the solution without upsetting the underlying code.

The composable architecture consists of a nested hierarchy of increasingly sophisticated code combinations:

- Level 1, the smallest 'LEGO' piece, consists of a component that performs a single discrete function.
- Level 2 are blocks of components to provide a series of connected functions.
- Level 3 are applications with several blocks joined together to perform an end-to-end function such as sales force automation, marketing, service automation, or operational workflows.
- Level 4 is a combination of applications providing a suite such as CRM.
- The complete solution may also include API connections between, for example, CRM, e-commerce, and operational systems and their associated workflows.



**FIGURE 1: COMPOSABLE ARCHITECTURE**

If the enterprise has software developers, they may be involved at the lowest level ( Level 1. in the diagram) or use Creatio’s Marketplace to find a readymade microservice. All subsequent levels can be developed without additional coding using Studio Creatio, the no-code platform. It includes very easy-to-use visual workflow design tools to support any enterprise process. The advantages of the composable architecture and no-code development capabilities are that it reduces development bottlenecks, enabling business domain experts or business analysts to drag and drop components or readymade blocks of components sourced from the Creatio Marketplace or internal library. Once tested and proven, the resulting applications are stored within the Applications Hub.

Creatio’s no-code app development, accessible to business domain experts, not just technical people, significantly removes constraints to rapid adaptation. Creatio’s Freedom UI Designer fosters adoption and enhances the overall experience, especially for the non-technical.

Creatio’s Freedom UI Designer provides an intuitive and consistent user experience supported by machine learning (ML) prompts and contextual guidance. As well as providing simple drag-and-drop no-code tools, Creatio has developed the Freedom UI Designer that can be used to create customizable user interfaces and match existing enterprise branding. The Freedom UI makes it much easier for non-technical employees to build apps. Many of the industry templates with embedded workflows use ML to act as prompts to help the user complete their tasks. Additionally, ML algorithms can be added to new workflows to help

the user or provide the next best recommendations to customers interacting online, via smartphones, or in-store devices.

The Freedom UI also helps the adoption of new applications and their associated workflows.

Creatio reported a retention level of 130% in 2022. What it meant by this is that existing customers are not just staying with Creatio but adopting it more widely within their organizations.

### Creatio provides comprehensive guidance so that freedom doesn't lead to a free-for-all and applications chaos or inadvertent regulatory non-compliance

As discussed earlier, enterprises face increasing regulatory pressures. Some may consider the flipside of freedom to be an acceleration toward chaos. The unfettered development of new applications and workflows might lead to unintended consequences, potentially derailing the business. To mitigate the risk of regulatory non-compliance, most medium-to-large companies will already have policies and personnel to ensure regulatory compliance. Best practices and oversight can mitigate other risks that stem from unbridled development. To help with this, Creatio provides comprehensive guidance on best practices to ensure effective use of the platform and the no-code develop-test-launch process.

While it is theoretically possible for a department or individual within a department to 'go rogue' and spin up new applications to suit their narrow needs, Creatio's advice is to formalize the process to create an effective development and innovation engine within the business. The vendor has published very readable and comprehensive guidelines with its [No-code Playbook](#).

Depending on the complexity of the capabilities to be developed, Creatio recommends establishing a multi-disciplinary team, either a centralized Center of Excellence (COE) or a Fusion Team pooling talent from multiple business areas for the most complex projects impacting multiple departments or a DIY delivery model for more straightforward localized and low-risk adaptations. Typically the COE would include the following:

- Business stakeholder representatives, a mix of business domain, technology, and analytical skills.
- A COE leader provides cross-functional leadership and prioritizes and manages people resources.
- Software developers and quality assurance technicians for more complex projects.
- Approvers – for compliance and security aspects of the project.

By organizing this way, everything is preserved in translation between the business and IT. The IT department becomes an effective innovation partner within the company, and risks of non-compliance or security breaches are mitigated.

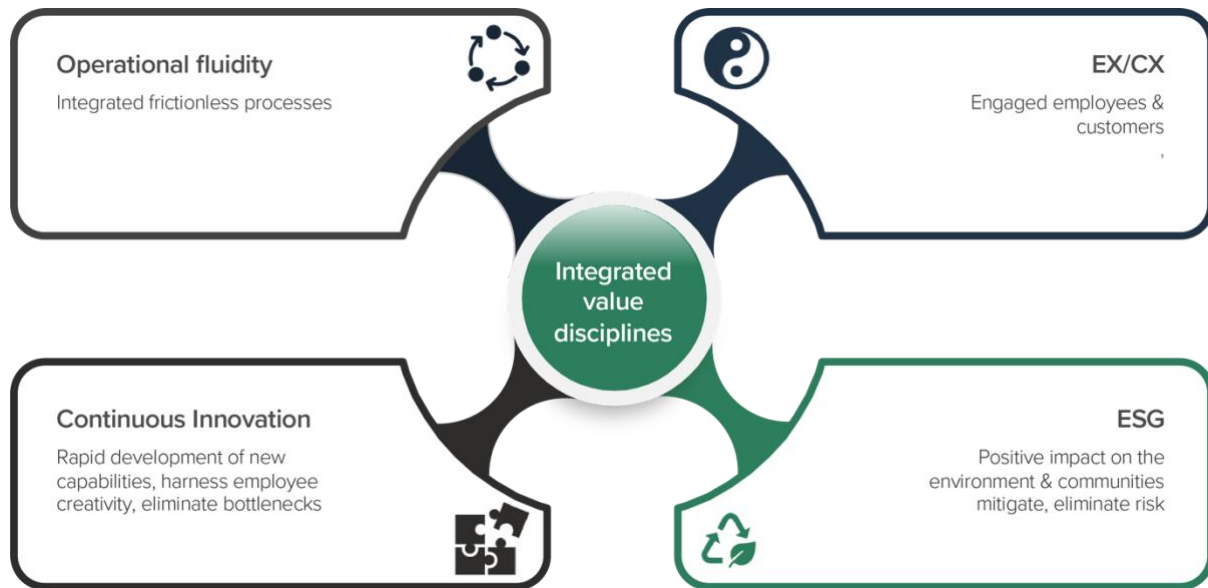
### CX-Create's viewpoint – Creatio provides an effective and affordable platform for rapid adaptation

Creatio is growing rapidly and has won multiple [awards and recognition](#) among industry analyst firms and others. Our prognosis is that Creatio's composable architecture offers the right



approach to keep up with accelerating change. The advice and guidance on no-code offered in its recently published [No-code Playbook](#) publication is filled with practical advice and recommendations. It is easy to understand and is a must-read for anyone considering Creatio's No-code Platform. Our additional suggestion is to consider and adopt four integrated value disciplines outlined in Figure.2.

Successful business transformation starts with enterprise coherence and integrated value disciplines.



**FIGURE 2: FOUR INTEGRATED VALUE DISCIPLINES THAT MUST BE MASTERED – SOURCE: CX-CREATE**

Irrespective of industry, companies must address four critical areas to keep up with accelerating change and generate growth. The most obvious is to improve operational fluidity by creating processes that offer a frictionless and connected experience. The second imperative is to provide an environment that delivers a positive customer experience throughout their interaction journeys and enables employees to act swiftly and help their customers along the way.

Given the speed of change and intense competition for customers, companies must innovate continuously and refresh the value delivered to customers. This motivates them to come back for more.

The final discipline is ESG. As discussed earlier, this has become a strategic imperative for most businesses and is increasingly important to customers seeking to buy from companies that share their values.

While Creatio primarily aims to solve the EX/CX challenge, given its CRM heritage, its composable architecture, and the No-code Platform will help address the need for continuous innovation without the need for additional IT resources. Currently, Creatio does not cover the ESG challenges. It could either develop an application to address this or find development



partners who do and add them to the Creatio Marketplace. There is nothing to stop companies from developing their ESG solutions using Studio Creatio.

Creatio has made substantial advances with its latest release, 8.0.6, and we fully expect this rapid progress to continue with the next release, 8.1, scheduled for September 20, 2023.

## Appendix

Further reading:

[The No-Code Playbook](#) – by Creatio

[New value disciplines must be mastered for the digital age](#) – CX-Create

[The enterprise as an adaptive living system](#) – CX-Create

[Six principles behind a symbiotic Customer Experience](#) – CX-Create