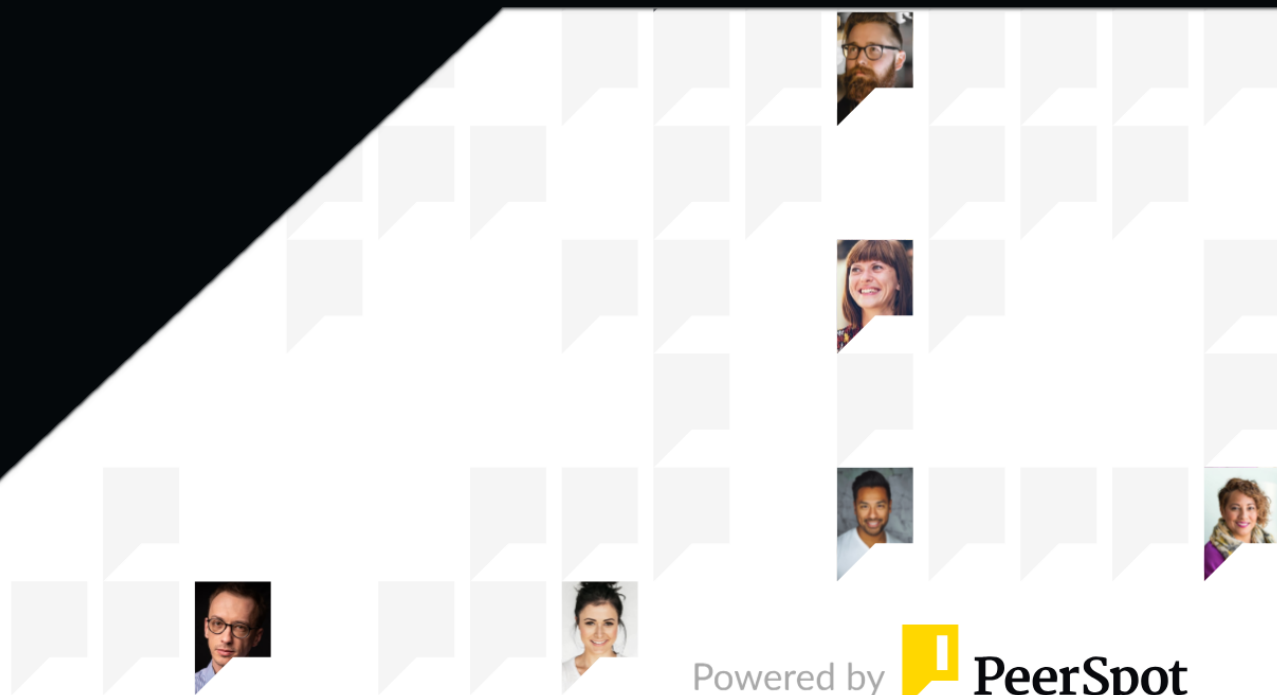




Creatio Sales

Reviews, tips, and advice from real users



Powered by  **PeerSpot**

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Product Recap



Creatio Sales

Creatio Sales Recap

Creatio Sales is an agentic sales platform designed to manage the end-to-end sales cycle, supporting everything from short transactional deals to complex B2B sales. It enables sales teams to build pipeline, manage accounts and opportunities, execute commercial processes, and forecast revenue on one platform. Embedded sales AI agents automate routine tasks and support execution across the sales cycle.

The core applications of Creatio Sales cover **Customer 360 and account intelligence; portfolio and territory management; engagement, lead, and opportunity management; quotes, orders, and guided selling; and forecasting, field sales, and partner channels**. Together, they provide a connected environment for managing customer relationships, prospecting, deal progression, commercial transactions, and revenue planning across different sales models and channels.

Creatio's built-in sales AI agents support account enrichment, lead and opportunity insights, meeting preparation, next-best actions and offers, sales productivity, and field sales. These agents can identify buying signals, explain lead scores, assess deal risks, generate meeting briefs, recommend next steps, surface cross-sell and upsell opportunities, and automate follow-ups and administrative work.

Creatio Sales is built on the **Creatio Business & AI Studio** platform, which allows organizations to adapt sales processes, business rules, and interfaces with less reliance on custom development. It integrates with existing business systems and can operate independently or together with **Creatio Marketing and Creatio Service** as part of an end-to-end CRM environment.

What are the key features of Creatio Sales?

- **Customer 360 and account intelligence:** Unifies customer data, relationship information, buying signals, engagement activity, and customer health to give sales teams a consolidated view of accounts and identify opportunities for engagement and growth.
- **Portfolio and territory management:** Helps sales organizations structure account portfolios, assign and balance territories, identify coverage gaps and whitespace, and manage sales capacity using assignment rules and territory analytics.
- **Engagement, lead, and opportunity management:** Supports prospecting and multistep engagement cadences, lead qualification, opportunity progression, deal scoring and prioritization, and structured sales methodologies such as MEDDPICC.
- **Quotes, orders, and guided selling:** Connects product selection, quotes, orders, contracts, and sales documents within the commercial process. Guided selling, playbooks, next-best actions, and AI-assisted recommendations help representatives progress deals and determine appropriate offers.
- **Forecasting, field sales, and partner channels:** Supports revenue forecasting, mobile

workflows and guided visits for field teams, and partner sales processes including deal registration and shared pipeline management.

What business benefits or ROI should users look for?

Creatio Sales can help organizations improve sales productivity, pipeline management, and visibility across the sales cycle. Key areas of value include:

- **Higher sales productivity:** AI agents and workflow automation can reduce administrative work across account research, meeting preparation, follow-ups, data enrichment, and other routine sales activities.
- **Better pipeline visibility:** Lead and opportunity insights, scoring, deal-risk analysis, and pipeline analytics help sales teams understand where opportunities stand and which deals require attention.
- **More consistent sales execution:** Guided workflows, playbooks, sales methodologies, and next-best-action recommendations can help teams apply established sales processes across opportunities and representatives.
- **More effective account and territory coverage:** Portfolio, territory, relationship, and whitespace analysis help sales leaders allocate coverage and identify areas for potential growth.
- **Improved forecasting and sales planning:** Forecasting, pipeline data, and performance analytics give sales leaders greater visibility into expected revenue and sales performance.

Who is Creatio Sales best suited for?

Creatio Sales is a solid choice for organizations managing complex or high-volume sales operations across multiple teams, territories, channels, or sales models. It can support both shorter transactional sales cycles and complex B2B processes involving multiple stakeholders and stages.

It is particularly relevant for organizations looking to improve pipeline visibility, standardize sales execution, manage account and territory coverage, or use AI agents to reduce repetitive work across the sales cycle. Creatio Sales can be deployed independently or with **Creatio Marketing and Creatio Service** as part of an end-to-end CRM environment.

Valuable Features

Excerpts from real customer reviews on PeerSpot:



“The initial setup for Creatio is not complicated because they have a big department called Creatio Academy, which provides many materials, including videos and PDF files with step-by-step instructions.”



Yevhen Yukhno

CEO at B-OS, Unipessoal Lda.



“When comparing to other tools such as Salesforce, which I find complicated to work with personally, Sales Creatio's modules are easier to use with drag and drop functionality and configuration options.”



Verified user

Associate Product Consultant at a tech services company with 201-500 employees



“Each step of the customer journey is recorded by certain metrics and KPIs. If you want to do a lot deeper dive with Excel pivot tables or third-party analytics tools like Qlik or Tableau, that's an option.”



Harold Busby

Senior Sales Manager at a tech services company with 1-10 employees

- ✓ “Some of the best features of Sales Creatio are end-user ease of use, user interface, and speed of data entry, and the abundance of features at a very low cost is also notable.”



Harold Busby

Senior Sales Manager at a tech services company with 1-10 employees

- ✓ “Intuitive, low-code CRM platform that's easy to integrate and use.”



Verified user

Founder and CEO at Praxi Solutions, Inc.

- ✓ “Its configurability in terms of being able to change screens and fields and create workflows that are compatible with our business objectives is most valuable.”



Harold Busby

Senior Sales Manager at a tech services company with 1-10 employees

- ✓ “I like Creatio's workflows, automation, and no-code features that we can update as we wish.”



Verified user

ImDigital at a consultancy with 1-10 employees

What users had to say about valuable features:

“With Sales Creatio, you can have a customer service review, and it is GDPR compliant. Sales Creatio is one of the few solutions that can be hosted on-premises and on the cloud..”

Verified user

Associate Consultant at a university with 201-500 employees

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“The main valuable feature is the flexibility and the customization of the platform. There's not a single CRM out there, at least that I've used, that is quite as flexible as Creatio CRM. More specifically, Creatio sales in this case scenario. On top of the features, it's also the pricing because, if you look at some of the other companies even bigger than Creatio, they're charging at least 10 times what Creatio is charging..”

Verified user

CEO at PeerSpot

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“Some of the best features of Sales Creatio are end-user ease of use, user interface, and speed of data entry. The abundance of features at a very low cost is also notable.

“Sales Creatio has helped streamline sales processes with lead management and opportunity management that are spot on, and it helps with guided selling..”

Harold Busby

Senior Sales Manager at a tech services company with 1-10 employees

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“The most valuable features are the platform's agility and how quickly it can be modified to meet the workflows of any organization. That translates to a faster time to market and time to value.

Creatio doesn't take as long to implement as other CRMs out there, and you don't need as heavy a consulting staff for that implementation and those modifications. So, time to value is one of the big pluses for the platform..”

Harold Busby

Senior Sales Manager at a tech services company with 1-10 employees

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“When comparing to other tools such as Salesforce, which I find complicated to work with personally, Sales Creatio's modules are easier to use with drag and drop functionality and configuration options. Though it's designed as a drag and drop, one-box-fits-all tool, we encountered some issues with customer-specific customizations and getting support for those modifications.

“The integration aspect was better and easy to implement. We had to integrate multiple systems for one client, and the process was straightforward. We faced some issues, but we couldn't determine whether they originated from Sales Creatio or the client's application end. Overall, we didn't have to struggle with the integration process..”

Verified user

Associate Product Consultant at a tech services company with 201-500 employees

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“Creatio is usually used for starting with CRMs or some marketing automation, but after two or three months, clients wish for some improvements and usually start migrating all functionality from 1C to Creatio.

The advanced analytics in Creatio helps with the decision-making process since I work as a business analyst, a system analyst, and a project manager on projects for this product.

The drag-and-drop campaign designer in Creatio may be advanced, and the platform has a very advanced no-code editor, where business analysts can work as no-code developers. If I need deep customization, I can use C# code to create modules and connect to Creatio for much more customization.

Creatio has a marketplace with third-party and its own applications, but many integrations must be custom solutions because the current market focus of Creatio is the United States. Some Ukrainian companies have much more needs, but Creatio does not support it right now; it is a responsibility of the partner community.

The performance management tools in Creatio help track performance metrics in the team, and they may function as standard solutions in task activities in Creatio. If I need some advanced analytics, I must make integrations with Microsoft BI or another BI..”

Yevhen Yukhno

CEO at B-OS, Unipessoal Lda.

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Other Solutions Considered

“I am not certain about previous solutions as I have completely moved away from the Sales Creatio portion of the company and am now in a different sector..”

Verified user

Associate Product Consultant at a tech services company with 201-500 employees

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“We are using Sales Creatio. We were considering different RPA systems since Sales Creatio is not one of those. We were researching Automation Anywhere and UiPath, but the company has now taken another direction..”

Verified user

Associate Product Consultant at a tech services company with 201-500 employees

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“I am comparing Sales Creatio to other platforms that I had experience using before, where they were paying a very high price for the functionality that Sales Creatio gives out of the box for a very low price.

“The main differences between Sales Creatio and something like Salesforce are that with Sales Creatio, you get sales, marketing, and service, and the cost is much lower while the functionality is much more integrated than you get with the other market leaders..”

Harold Busby

[Read full review](#) 

Senior Sales Manager at a tech services company with 1-10 employees

“I have used other CRMs, such as Sugar CRM, Hubspot and Salesforce. The main difference is cost. The other difference is time to value along with features and functions.

For example, even with Creatio's most basic plan, which has Growth, Enterprise, and Ultimate, I use the Enterprise version. It's a fully-featured CRM that includes sales, marketing, and service, along with the studio product.

That's different from some other vendors where they have different tiers of their product, and you don't receive all the features unless you're ready to pay an exorbitant amount – whether it's Salesforce, Microsoft Dynamics, Sugar CRM, or definitely HubSpot.

I commend Creatio for that approach, and it's going to pay off even more as people become more aware of the product..”

Harold Busby

[Read full review](#) 

Senior Sales Manager at a tech services company with 1-10 employees

“A little bit about ourselves here: We used to be the master distributors for SalesLogix. SalesLogix is an Infor CRM today. It's a solution. They didn't do anything to the product. We spent a lot of time on it and they downgraded the quality.

We decided to look for something else. We did some research and obviously tried Salesforce, Microsoft, and Oracle. We did them all, tried them out, and we decided to go with Sales Creatio back in 2016. It's an excellent service with people who were very eager to please. Their support was great and their management was fantastic. The product was very good.

Going back to SalesLogix, it was sold to Infor. Infor is a very, very large ERP organization that acquired SalesLogix. Their goal was to transform SalesLogix into a more modern, flexible, new technology which integrates with their ERPs. To a certain extent, they did that. I don't want to blame them, but at a certain point in time, they did not evolve as fast as we expected, so they had to recreate the platform from the bottom, from scratch almost, because that was an old technology. They had to really bring it up to the Cloud. Instead of bringing that old technology to the Cloud, they developed a new platform. The problem was it was no good. When you compare their platform to Sales Creatio, particularly the flexibility and the no-code, Sales Creatio was hard to beat. It's easy to go into a client and beat Infor CRM. That was frustrating for us. They were not a CRM-geared organization. They were a customer experience in general, which is fine.

When you talk to Sales Creatio, it's a lot easier to deal with because it's one product. It's one platform. Another thing that sets Sales Creatio apart from its competitors is that it has marketing, sales, services, and the studio: all with the same DNA. It was all developed from the same platform. Other platforms, including Infor, in order to get something done, what they do is they acquire the other platforms and then they have to integrate. What they'll have at the end of the day is too many moving parts. You can really see and notice how hard it is to move data from one end to the other, and how hard it is to make sure things look the same. You see that on Salesforce. You see that on Microsoft. You see that on Infor. On Sales Creatio, it's transparent because it was born from a BPM platform.

They claim to be CRM but the bottom line is the engine is BPM which evolved to a layer where you have marketing, sales, and service on top of it.

This is phenomenal because you don't realize that all three units are integrated. That, to me, was key to us selling Sales Creatio to our clients. Selling Infor was a nightmare. We were attached to Infor. We were Infor's exclusive distributors in Latin America at one point. We were very loyal to them, but we were losing projects left and right.

When you bring something new like Sales Creatio, it's night and day. We wanted to make a demo. To create a process with Infor, it would take us hours. With Sales Creatio, it only took seconds, or minutes. It's very visual, very icon-oriented. It's so much easier. Our presentations were much more effective. Clients loved this solution. At the end of the day, they said: "Guys. Forget about Infor. Let's use Sales Creatio for the project. Present to us, send us your proposal for Creatio." We then realized that we had to make the switch, so we decided to scrap Infor CRM internally and started using Sales Creatio..”

Verified user

Founder and CEO at Praxi Solutions, Inc.

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ROI

Real user quotes about their ROI:

“We haven't computed the ROI. Some of our clients do that, but I don't have that off the top of my head. In general, it's positive, but we don't do that as much, so I don't have the number..”

Verified user

Founder and CEO at Praxi Solutions, Inc.

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“It's hard to estimate our return because we don't know what part of the revenue increase can be attributed to the application. However, I can say that we've grown since we started using CRM, but the reason is more difficult to ascertain..”

Verified user

ImDigital at a consultancy with 1-10 employees

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“You start seeing it within six to eight months after all the change management, integrations, and everything else is complete within an organization. Once you start using the product consistently and get away from the initial jitters of change, people really like using Creatio.

The user interface helps them do their job better and more efficiently, and our team actually enjoys logging into it. It also has an internal Slack-like feature where they can chat and have feeds, not just email, to teammates all over the world – all within the application at no extra cost..”

Harold Busby

Senior Sales Manager at a tech services company with 1-10 employees

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Use Case

“Due to Creatio’s versatility and customizability, almost all business problems can be solved using the various flexible tools that the software has to offer..”

Verified user

Works

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“The use case is B2B sales and working with manufacturers and distributors selling high-tech equipment.

In terms of the version, it is always up-to-date..”

Harold Busby

Senior Sales Manager at a tech services company with 1-10 employees

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“I have worked with Sales Creatio. I personally have been working with it for about two years since September 2021. I moved on to something else after that period. I worked with Sales Creatio before they implemented their new design. I am not certain whether it was just Sales Creatio or the three combined versions. What I worked on was a very basic version of Sales Creatio without many of the modules they were offering. We implemented it for telecommunications companies, financial institutions, and banks..”

Verified user

[Read full review](#) 

Associate Product Consultant at a tech services company with 201-500 employees

“The main use case for our clients is being able to manage their entire sales process. Starting with leads into opportunities, creating dashboards, being able to see a bird' eye view on the performance of their entire sales team. Whether it's sales, whether it is just a regular account executive, it really provides a bird' eye view on exactly what your sales department is doing, from lead qualification to finalizing the deal and setting out the contract and getting it signed.

Internally, we use the solution pretty much the same. We also have inbound leads. We qualify opportunities. We have our specific stages within the opportunity section where we're able to just run our sales process from start to finish to them signing a contract. We then implement the solution for them..”

Verified user

[Read full review](#) 

CEO at PeerSpot

“We're using Sales Creatio for its basic purpose. We provide service to our clients, particularly tech support, and that's very important. Clients call in if something's not working, because we implement Sales Creatio and other solutions to clients, e.g. general clients. If they have a problem, they'll send us a ticket. We register the ticket, provide support within one hour or two hours depending on the agreement we have with these people, and that's just the basic with the client. We also have sales, particularly sales processes. We qualify the leads. We have the marketing processes. We have the lead qualification. Once we get to a certain level, the lead gets assigned to the sales person and that person starts the process, and we go through each of the stages until we close. We then close the loop by assigning a team to implement and install. Now, we're done with our sales.

It's a project. We go through the whole cycle of the sales process. We have the lead qualification, then the sales assignment, then we close the project, and then it becomes a project. We manage the project: all the stages, meetings, and schedules.

When everything is said and done, clients start calling in for tech support. That's what we do..”

Verified user

Founder and CEO at Praxi Solutions, Inc.

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“I use Arch Linux and Fedora Linux in my workstations, and I work with some products like Gentoo for embedded and Fedora for desktop. My preference is Arch, but Arch is for me, not for enterprise.

Apart from Linux products, I work with many open-source SQL solutions such as PostgreSQL and CRM software such as Odoo and Creatio for my customers.

I speak about Service Creatio, which is a SaaS.

Creatio is a BPMN platform with two standard propositions: marketing and sales, and three service propositions over the platform. The Creatio platform is a BPMN engine with no-code instruments for no-code development, but if needed, I can use C# for deep customization.

I use Marketing Creatio and Sales Creatio the most, and right now I work with my partners on customization for manufacturing and production, and I think we will release it in three to four months..”

Yevhen Yukhno

CEO at B-OS, Unipessoal Lda.

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Setup

The setup process involves configuring and preparing the product or service for use, which may include tasks such as installation, account creation, initial configuration, and troubleshooting any issues that may arise. Below you can find real user quotes about the setup process.

“The solution's initial setup depends entirely on the business analyst you are using. The business analyst should be conversant in Sales Creatio and have technical knowledge..”

Verified user

[Read full review](#) 

Associate Consultant at a university with 201-500 employees

“The initial setup for Creatio is not complicated because they have a big department called Creatio Academy, which provides many materials, including videos and PDF files with step-by-step instructions. It is very well done and not very complicated..”

Yevhen Yukhno

[Read full review](#) 

CEO at B-OS, Unipessoal Lda.

“It was pretty straightforward to set up Sales Creatio initially. There are some nuances and nomenclature that you had to get used to, but there is initial online training that is best to go through before starting to delve deep into the product..”

Harold Busby

[Read full review](#) 

Senior Sales Manager at a tech services company with 1-10 employees

“The initial setup of the solution is definitely straightforward, especially compared to other CRMs out there. A lot of the business processes already come out of the box, you just need a few tweaks to really get it tailored to your business.

Implementation can take between one and five days on average, depending on your business and processes..”

Verified user

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CEO at PeerSpot

“The deployment depends on the size of the company and the specific use cases they want to implement. A lot of the people I talk to have come from other CRMs like Salesforce, Microsoft Dynamics, Sugar CRM, and HubSpot. In any case, I haven't heard of a large deployment taking longer than five and a half months – and I mean very large, with thousands of users.

Typically, we're looking at three to four months. That's mostly focused on getting data migrated over, making sure it's clean and de-duplicated. For a medium to large organization, I would say three to four months is pretty standard. For smaller companies, we're talking weeks..”

Harold Busby

[Read full review](#) 

Senior Sales Manager at a tech services company with 1-10 employees

“The setup for this solution was straightforward.

We are savvy. We are implementers. We've been doing this for the past 20 years, so my team is really, really good. Implementing Sales Creatio was way easier than implementing Infor CRM.

We were very specific on how we wanted to do things. We had our people certified first. We set up a few platforms on our own, then we implemented our own platform. It took less than two weeks, maybe even less than that. We were just tweaking here and there and creating processes here and there. Implementation was almost out of the box to begin with, then we started customizing some of our processes. I wouldn't even say customizing. We were configuring things. Sales Creatio is so good with that, particularly with the sales process and the service, so all of our processes were already there out of the box. All we needed to do was to configure it according to our methodology and how we utilized, but then again, that's not a surprise. We are an integrator. They are vendors. We are software vendors/implementers, so Creatio understands that. That's what they do. If we were a hospital, or if we a store or a vet, for example, we probably would have to configure it. Even in that situation, it doesn't change as much because the software is so flexible. To customize, implement, and configure it is really a breeze. We do this for a living. We just now finished a large implementation in Texas and that is very, very, very complex, yet it was simple compared to any other platforms that we are familiar with..”

Verified user[Read full review](#) 

Founder and CEO at Praxi Solutions, Inc.

Customer Service and Support

“The support is generally quite good, though response times can be slow. When raising support tickets with all possible information extracted, sometimes the reply would ask for information already provided in the previous email. We have had some issues where I needed to contact the customer support manager, but they ensured the issues were resolved..”

Verified user

[Read full review](#) 

Associate Product Consultant at a tech services company with 201-500 employees

“Overall, especially because I'm a partner, we get instant support from the technical team. They're always very helpful in regards to the clients that we work with as well. They really never had any kind of problems. As a partner, we also provide them with support. I have no complaints in that department..”

Verified user

[Read full review](#) 

CEO at PeerSpot

“The technical support for Creatio could be better and must be better. The company is oriented in its support policy as Microsoft is, but I think Creatio is not as big or mature as Microsoft, and the support is not very good for me. I understand that support must be better for a company like Creatio.

I would rate the support from zero to ten points as five out of ten..”

Yevhen Yukhno

CEO at B-OS, Unipessoal Lda.

[Read full review](#) 

“I would evaluate the customer service and technical support of Sales Creatio as an eight on a scale of one to ten; they've been very responsive, although there have been instances where they did not have an easy and understandable resolution to some concerns.

“They were eventually able to overcome those challenges.

“It just took longer than anticipated because they had been responsive in other areas..”

Harold Busby

Senior Sales Manager at a tech services company with 1-10 employees

[Read full review](#) 

“Based on my experiences, the customer support and service are strong. I've only had a couple of issues, and they were related to a third-party product I was trying to integrate. I was getting emails all hours of the night – someone was actively working on it, and we finally got it resolved.

So, I have to give them kudos for that. It took about a week, only because they had to work with the third-party vendor to make sure the API was working correctly. They were able to analyze Creatio system, ensure there were no corrupt files on my side, and test it using their internal tools.

Ultimately, we did find that there was a missing element on the third-party vendor side that needed to be enhanced for proper integration with Creatio. .”

Harold Busby

Senior Sales Manager at a tech services company with 1-10 employees

[Read full review](#) 

“In general, Sales Creatio's support is fantastic. They are very on the ball. They pay attention to us. They escalate if necessary. They have several levels. They have different programs and they do a great job. It was only with marketing that we have had issues in the past. It took longer to get the ball rolling and they had to escalate to different levels, but they fixed the issue.

Today, I had a question for them regarding our DNS. We sent them an email. Within five minutes, they were able to get back to us with a suggestion. They probably realized last year that they needed to change and up their game and they did. Bottom line is I have no complaints. I celebrate their improvement.

Sales Creatio has gone a long way. That's an impressive process they've come up with. I have worked with Microsoft before, also Salesforce and Oracle, and sometimes I felt like we were not important. Sales Creatio was able to make us feel very important..”

Verified user

Founder and CEO at Praxi Solutions, Inc.

[Read full review](#) 

Other Advice

“Overall, I'd rate it a nine and a half out of ten. The half-point deduction is only because of the mobile app and lack of a built-in field service solution. Otherwise, it's excellent..”

Harold Busby

Senior Sales Manager at a tech services company with 1-10 employees

[Read full review](#) 

“If I summarize everything, I think it is a strong seven, so I rate Creatio as seven out of ten. I would recommend Creatio to other clients. My overall rating for this review is seven out of ten..”

Yevhen Yukhno

CEO at B-OS, Unipessoal Lda.

[Read full review](#) 

“Sales Creatio was deployed on-cloud in our organization. Sales Creatio is a comparatively new solution.

Overall, I rate Sales Creatio a nine out of ten..”

Verified user

Associate Consultant at a university with 201-500 employees

[Read full review](#) 

“I rate Creatio nine out of 10. It does what it is supposed to, and we're happy. I recommend it. Creatio is reliable, fast, and fits our goals, but it falls short of a perfect 10 because the mobile app isn't so easy to use. Anyone who wants to implement this solution can easily adapt it to their business. You can customize it to your needs..”

Verified user

ImDigital at a consultancy with 1-10 employees

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“I utilize the opportunity management feature in Sales Creatio.

“I assess the role of Sales Creatio's mobile capabilities for helping my sales team's flexibility as it's best to use an iPad versus a phone at this point.

“I am a customer and partner of Sales Creatio and use it internally.

“Overall, on a scale of one to ten, I would rate Sales Creatio a nine..”

Harold Busby

Senior Sales Manager at a tech services company with 1-10 employees

[Read full review](#) 

“I was looking into [Automation Anywhere](#) and UiPath related solutions about one and a half years ago because my company was considering becoming an implementation partner. However, the direction has changed since then.

“I would suggest that the integration of AI components is a significant advantage. When they first introduced AI components, we researched it to explain to clients how we could use this component to create certain workflows. I assume this has improved since its introduction. This is the biggest advantage as customers can experiment with creating workflows and implementing desired modules. It's quite simple – you input a prompt and receive what you want.

“On a scale of 1–10, I would rate Sales Creatio an 8..”

Verified user

Associate Product Consultant at a tech services company with 201-500 employees

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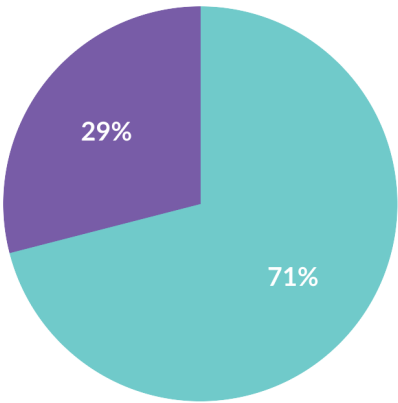
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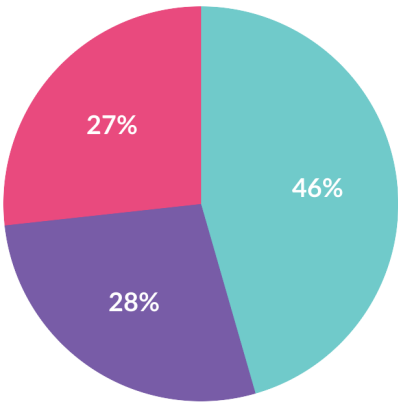


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Large Enterprise Midsize Enterprise Small Business

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