Creatio

No-Code/Low-Code

Buyer's Guide

Sources of Sales Opportunities

Newsletter - 16%

Digital -

Print media - 12%

Event - 47%
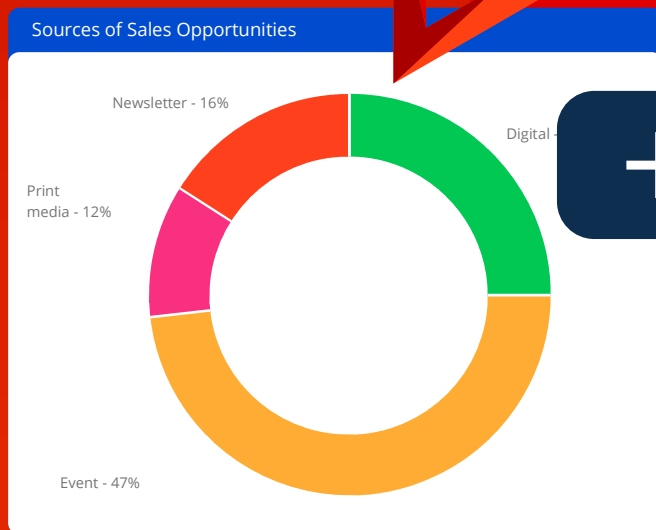
+ CREATE NEW APP
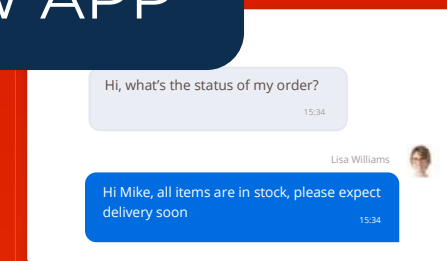
Closed tickets
72

Average rating
4,5

Average resolution time
2,2

Hi, what's the status of my order?
15:34

Lisa Williams

Hi Mike, all items are in stock, please expect delivery soon
15:34

ACCELERATE

CONTENT

Today, every successful organization gradually becomes a software company to fulfill its needs for workflow automation, application development and digital engagement. However, a lack of skilled resources combined with ever-growing IT backlogs forces many companies to wait for months or even years for a needed application delivery. To address IT challenges that create obstacles to long-term business success, more and more organizations from various industries consider adopting a low-code/no-code approach and transforming into no-code companies.

Low-code/no-code platforms accelerate the time-to-market of solution development, thus helping quickly and easily automate workflows. While there is a range of tools on the market, not all of them serve the same purpose. This guide is aimed at making navigation in the market more structured and efficient for you.

ACCELERATE

WHAT ARE LOW-CODE AND NO-CODE?

Low-code and no-code software development platforms allow both technical and non-technical employees to build, test, and deploy their own applications via visual designers with very little or no heavy lifting. According to Creatio's recent report **The State of Low-code/No-code**, IT professionals make up the lion share of low-code developers. These platforms require certain technical knowledge but allow for rapid and high-productivity development. On the other hand, no-code tools are geared towards business developers without technical skills. More than ever, we are seeing that businesspeople are showing interest in owning their applications and the configuration process.

No-code and low-code platforms offer drag-and-drop tools and a simple interface to make the development process visual rather than technical. Different visual and declarative capabilities allow users to build their own applications without learning how to write traditional lines of code. Some of the low-code/no-code platforms provide ready-made components, templates, and connectors to speed up the development process and let any employee within an organization assemble solutions to automate workflows. Traditional programming is therefore predominantly applied when there is a need for in-depth system customization or more complex custom solution development.

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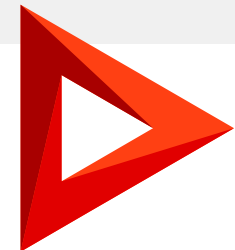
LOW-CODE VS. NO-CODE

Although similar, low-code and no-code platforms still have some differences that you may want to consider:

SIMILARITIES

- Both low-code and no-code tools allow you to reduce time to market as you deploy your applications.

- LC/NC technology enable businesses to distribute resources and control the workload, especially for overwhelmed IT departments. Companies become more self-sufficient when they do not rely on external developers.

- Many LC/NC tools are intuitive and follow a clear if-then logic. Users can build and automate processes or applications using different templates, app skeletons, and drag-and-drop elements.

DIFFERENCES

- Low-code platforms give users more access to the traditional coding and often offer more in-application development tools. They are more often used by professional developers. Usually, such tools are geared towards more complex deployments.

- No-code platforms require close to zero programming, making them a perfect fit for business users without tech backgrounds or specific skill sets.

It's important to understand that the low-code/no-code market is emerging quickly, and these approaches may transform or even merge soon.

IT-DRIVEN REASONS WHY DO YOU NEED TO GO NO-CODE/ LOW-CODE?

The reasons for selecting low-code/no-code technology are relatively obvious. Organizations need tools to deliver on their commitments and transform their teams and processes using the right applications. Businesses don't have time to wait and want to have ownership over the process, while accommodating unique requirements. Meanwhile, using this approach allows you to gain the following benefits for IT departments:

PROBLEM

Application complexity is growing, and many companies do not have the solutions to automate operational and customer-facing workflows

SOLUTION

LC/NC tools empower both IT and business users to create, automate, and customize processes and eliminate unnecessary complexity

PROBLEM

IT backlog is increasing, and organizations struggle to find technically skilled workers to cover business needs. Business units expect the overwhelmed IT professionals to administer and maintain the IT environment, govern technology solutions, oversee cyber security, and configure process automation

SOLUTION

With LC/NC platforms, IT departments can focus on the most complicated tasks and hand the reins of app delivery to almost any employee within the organization. The company can boost its productivity without expanding the IT department or working with third-party developers

IT-DRIVEN REASONS WHY DO YOU NEED TO GO NO-CODE/ LOW-CODE?

PROBLEM

IT budgets are not adequately distributed. Instead of investing in innovations, enterprises spend most of their IT budgets on maintaining the outdated legacy systems

SOLUTION

Implementing a LC/NC platform allows companies to shift their focus, support continuous innovation and increase agility, thus pave the path for a more future-proof strategy

A question we often hear from our buyers is how to decide between using low-code/no-code technology vs purpose-built application. We believe that you should opt-in for low-code/no-code technology if:

▶ Your organization expects to deploy multiple applications and workflows.

▶ Your requirements contain unique processes that will require intensive customization.

▶ There is lack of ready-to-use applications available on the market for your specific use cases, or the available applications are not providing you with the needed level of freedom.

We would like to share with you a real-life story to emphasize all the key points mentioned above.

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CASE STUDY

Let's take a look at a real case of one of the largest banks in Central America that uses Creatio as a pivotal platform for its front-office operations. As a protagonist of the economic development in the region, the bank is focused on creating innovative products and services, deepening their relationships, and responding to their client's needs. The bank's requirements included a powerful and configurable workflow-based solution to optimize loan management and account opening workflows for different arms of their business. The bank didn't have 6+ months to deploy the system using standard enterprise solutions. As such, they decided to form a team of citizen developers, which was the first project of this kind for the bank. **Working collaboratively with Creatio, citizen developers successfully deployed the system within just 2 months. Thanks to low-code/no-code technology, the bank created workflows that made the platform a perfect fit for the company's internal operations without writing a single line of code.** *The platform helps to guide customers through all stages of their journey, starting with new account opening, through to customer onboarding; leading to loan management processes for individuals and corporate clients. After a successful pilot, the bank was certain they made the right decision choosing Creatio and rolled out the system enterprise-wide. Ease of configuration and simplicity of process design allows adapting the company processes in a matter of days or weeks without the need to engage developers. This is a great example of significant digital transformation delivered in a whole new way, while maintaining high levels of efficiency and increasing the delivery capacity of the organization.*

Now, let's review a possible scenario of selecting and deploying the right low-code/no-code technology for you with a focus on best practices.

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#1

SET UP CLEAR GOALS SET UP CLEAR GOALS

Successful implementation of no-code and low-code tools can mean different things to different companies. Having well-defined goals will help you to navigate through a selection process much more efficiently. We suggest that you pay attention to the following areas:

- **Business KPIs:** define how your employees will meet their KPIs as you deploy a LC/NC approach. After leveraging low-code/no-code, productivity will increase without the hiring of additional employees or increasing the workload for existing ones.

- **IT KPIs:** you should also focus on the productivity of your IT staff, the ability to fulfill the backlog, reduce IT costs per application, etc.

- **Adoption and employee satisfaction:** no matter how great a LC/NC platform might be, it will only benefit your business if the workers see the new technology as a facilitator and not a burden. Strive for a provider who can address your workers' key pain points.

As with any important projects, it's critical to define how exactly success will be measured, and understand and align the team on key reasons, expectations and long and short-term success criteria.

#2
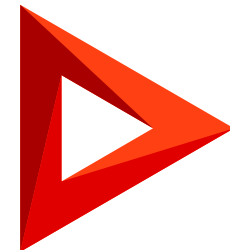
DEFINE REQUIREMENTS

Once the goals are clearly established, you can start working on the requirements that are categorized according to the following structure:

- Business and IT-related.

- Short-term and long-term.

- Use case and platform focused.

- Vendor profile and support expectations.

- Commercial model and its alignment with your expectations.

We suggest that you stay laser focused on your specific goals and create a list. There are a few practical suggestions of what to include into this list:

First, consider selecting the providers that focus on increased **reusability** of out-of-the-box business components, templates, widgets, and plug-ins. This approach will make your transition fast and effortless because people build applications from ready-made blocks instead of reinventing the wheel every time. This characteristic is especially important if you plan to foster citizen developers.

Second, look out for an intuitive and consistent UI to leverage **model-driven development,** which will allow both technical and non-technical employees to model applications visually without extra training. It increases productivity and boosts the number of workers who can be involved in software development, leading to a reduced IT backlog and increased flexibility.

#2

DEFINE REQUIREMENTS

At this point, you can also estimate the **pricing** of new technology. Low-code and no-code providers have different business and pricing models. This does not mean that some approaches to pricing are better than others. Some may just correspond to your needs better. For example, a named user model will provide you with the most predictable model but may not be the best fit in case you need to roll out an application for a wide group but with light scope (unless your vendor is offering flexible options). Try to stay away from custom models and non-transparent vendors to avoid negative surprises and lock-ins.

We also suggest that you include **attributes of a company** to your list. It's important to evaluate how interested vendors are to work with you; do you fit their ideal customer profile, do they offer a robust support and customer success program and more importantly – do you enjoy partnering with them and do they really care about your future success with their platform?

There are two necessary criteria to keep in mind when preparing further requirements: **task complexity and product ownership type.** We will now look at these two steps in more detail.

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#3

THINK OVER THE USE CASES AND THEIR COMPLEXITY

As we described above, low-code and no-code platforms provide their users with a wide range of opportunities, but some of them require more skills and programming experience.

Low-code and no-code platforms allow you to build apps of low, medium, and high complexity. Here are some of the most popular low-code and no-code use cases. It's important to determine the complexity of your workflows to correlate with the vendors' capabilities. The criteria that define complexity are:

- ▷ Integrations and interactions with other IT systems.

- ▷ Overall number of users and handoff included in the process.

- ▷ Number of business rules that are foreseen in workflow execution.

- ▷ User permissions and security requirements.

- ▷ Data operations, complex calculations.

- ▷ Variety of unique workplaces and UI pages.

The more complex the requirements, thus a greater focus should be placed on the ability of the future vendor to deliver enterprise-grade capabilities and nimbly manage these complexities. In this case, no-code vendors focused on simple application deployment may not be the best fit. In the meantime, if the expected level of complexity is low, sophisticated solutions may be an overkill for your business.

#4

DETERMINE THE TYPE OF PRODUCT OWNERSHIP

Choosing an ownership structure is a critical step in your journey towards the perfect deployment. The key question to ask is who will be owning the platform and how to establish effective cooperation between business and technical teams. There is no one-size-fits-all answer, however we would recommend selecting the team that is suitably ready and willing drive the initiative further. Setting up the right collaboration is the next critical step. The goal of implementing a low-code/no-code platform is to significantly extend capacity and engage more resources than with traditional IT systems. As an organization is going through this journey, we would recommend establishing a formal citizen development program that would incorporate all critical aspects including:

- Selection of citizen developers.

- Their onboarding and training.

- Business and IT alignment workshops on collaboration.

- Business and IT alignment workshops on administration and guardrails.

- Certification.

Upon completing these steps, an organization may decide which form of ownership makes most sense. The form will be dependent on the level of complexity and future plans. Even if IT is the assigned owner, it's critical to significantly increase the level of engagement from the business side (engaging as many citizen developers as possible) by delegating design and configuration tasks to them.

#5

EVALUATE INDUSTRY EXPERTISE

Once you've completed these steps, you can move on to analyzing the market offerings. Understandably, you will reap the most benefits from vendors who have ready-made solutions for your industry. Research the company with the help of their website to see the typical clientele. For instance, if you need a LC/NC solution for insurance claim management, it makes more sense to go directly to the vendors who have worked with financial institutions and insurance companies in the past and have available templates and expertise for the use case. The more complex the case, the more focus on vertical knowledge it may require.

Many vendors partner with system integrators. These partners can specialize in providing solutions for businesses in particular regions or industries. Try checking the options available in your area before going to the vendor directly. Working with the vendors through their partner networks can also provide you with extra support during the deployment stage.
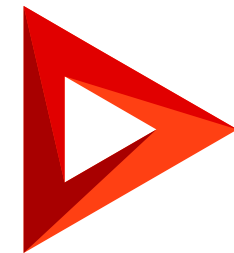
#6

CHECK THE ANALYST REVIEWS

One important step in comparing various low-code and no-code platform vendors is taking a look at key analyst findings. These analysts take a deep dive into each software provider, their platform, the results achieved by companies while using the platform, etc., that can help you make a decision. The analyst reports that you consider should be based on the needs and requirements that have been defined in the previous steps; some of them may evaluate software for simple process design, while others look at providers of high complexity workflow automation software.

Two primary professional opinion sources that should be considered are Gartner and Forrester.

Gartner is a leading research and advisory company that provides business leaders with valuable insights. The reports are organized in Magic Quadrants. Their Low-Code Application Platforms Quadrant is further divided into four sections: Challengers, Leaders, Niche Players, and Visionaries. As the market is continuously adapting, we would recommend you evaluate all the vendors included in the report.

Similar logic applies to **Forrester** recognitions, organized in the so-called Forrester Waves. Forrester is an independent research firm that analyzes the present market trends and makes predictions about the future of business, technology, and software. There is a number of reports that evaluate low-code/no-code platforms. E.g. if business users own the process automation project in your company, you should check the Low-Code Development Platforms for Business Developers.

* Note: Gartner and Forrester reports are not available for free, so you will not be able to check the vendor's position on your own (the recognitions are likely to be posted on the websites without details). Specific data is often included in value proposition decks during the product presentation that you will schedule with the companies. You can also purchase reports on their respective websites.

#7

LOOK THROUGH THE PEER REVIEWS

Customer and business reviews are another great source of information about the software providers you may be considering. On most of the review websites, you are able determine the job role of the reviewer, be it a software developer, process designer, marketing manager, or a COO. The job role may provide a clue on the actual day-to-day usability of the software. The reviews by users who work in companies that have similar pains points/goals are the most relevant.

Here are some of the sources that can help in your final decision-making process:

- **G2:** Hundreds of timely, real, and verified reviews. Pay special attention to video reviews and please be advised that all text reviews are being thoroughly checked by the G2 team to exclude falsified reviews.

- **Gartner Peer Insights:** Gartner can also help you better understand the market and choose a vendor confidently. If you already have your favorites, you can search them by name. If you need more options, just go to the Enterprise Low-Code Application Platforms section.

- **Trust Radius:** another valuable source of B2B insights that do not sell leads or paid placements. Vendors cannot post sponsored reviews or request the existing ones to be removed. The website also has a list of Top Rated Low-Code Development Products.

- **Capterra:** you can find and compare software options, as well as read reviews. For each company that you search, you immediately see the list of pros and cons based on other people's opinions.

You can also benefit from checking out Info-Tech Software Reviews, GetApp, and Software Advice.

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#8

REQUEST A DEMO

After outlining requirements and short-listing some of the providers that better match your criteria, it's time to contact the vendors.
We recommend that you use multiple steps to make your selection.

With simple self-service tools you can start with a guided trial. However, if you are selecting a more complex tool, you may want to get an initial introduction to the system done by the vendor. As you are working through the products and gain a better understanding, you can request:

▷ General overview of the platform focused on OOTB capabilities.

▷ A specific demonstration of your use case.

▷ Demonstration on how the application will handle multiple use cases.

▷ Discussion of security, administration and further scaling.

▷ Quick introduction of the product to the users.

▷ Demo participation, with or without guidance, for users-to-be to attempt building a workflow or an application.

#9

UNDERSTAND THE IMPLEMENTATION MODEL

Once you've seen the demos, you should be close to making a final decision. At this point, you should start thinking about the different ways the new technologies can be implemented and analyzing the vendors based on their ability to provide you with comprehensive support throughout this process.

The implementation process for LC/NC tools is different from the more traditional business solutions. Not only does this new approach speed up process automation, it also supports swift system integration that reduces the project timeline and ensures faster ROI. Look out for new expertise and external support to make your team more self-sufficient in terms of daily software development. Choose providers or their partners who are specifically focused on low-code and no-code implementation.

You can decide which deployment model will make the most sense for your team. In a high touch model, the selected integrator will be responsible for the deployment of the first application/workflow with your active participation. While in the low-touch model, the integrator will focus on training and enabling your team to build the application without deep engagement in the deployment process.

Regardless of the engagement option you choose, always strive for an increased self-sufficiency within the team: your employees should be able to maintain the implemented platform once the initial integration is over. Organizing corporate training sessions and providing people with e-learning materials is necessary to achieve long-term success and continuously expanding your citizen developers' expertise.

LC/NC EVALUATION CHECKLIST

CORE FEATURES

☐ Is this the right category of product for your business?

☐ Does this platform allow you to meet your goals?

☐ Can your citizen developers learn how to configure it? What is the level of difficulty of the processes in question?

☐ Does this platform provide you with the needed deployment options?

☐ Is there an extensive marketplace?

☐ Are there applicable add-ons and connectors?

☐ Does the vendor have available templates for my industry and use case?

☐ Does the vendor offer a robust user academy?

☐ Does the vendor offer an active user community?

☐ Does it meet your product ownership needs?

☐ Does it fulfill your customization needs?

PLATFORM REQUIREMENTS

☐ Does this platform provide you with direct code access if you need it?

☐ How robust is the workflow builder?

☐ How extensive is the UI designer?

☐ How flexible are capabilities to work with databases?

☐ How extensive are integration capabilities?

☐ What are the skills your employees need to work with this platform?

☐ Is this platform optimized for extensibility?

☐ What are security and administration capabilities?

LC/NC EVALUATION CHECKLIST

USER EXPERIENCE

☐ Does this platform have an intuitive UI?

☐ Can multiple users access the platforms at the same time comfortably?

☐ Do peer reviews indicate ease of use and understandability of the platform?

☐ Are functionalities of mobile and desktop versions consistent?

STRATEGY

☐ What implementation model is offered?

☐ Is the suggested implementation company focused on low-cow/no-code deployments?

☐ How does this platform integrate with the existing hardware/software of your business?

☐ How does it address future-state needs?

☐ Do the saved resources overdraw the costs of implementation?

☐ How does this technology fit into your company's vision?

VENDOR EXPECTATIONS

☐ Long term strategy of the vendor

☐ Is the roadmap available to prospects and customers? How has it been formed?

☐ Does the vendor provide you with extensive direct customer support?

☐ Are analyst reviews positive? Do key industry analysts recognize this vendor?

☐ Are vendor pricing models transparent?

☐ Is there a cultural fit with the vendor?

☐ Does the vendor demonstrate interest in our business and are we a sweet spot customer?

CONCLUSIONS

Although the decision-making process is not universal, you are more likely to match your requirements with the market offering perfectly if you follow all the steps listed above. Ideally, you would want to define goals, requirements, product ownership type, and the complexity of planned use cases even before researching the vendors. Once you do, see whether the providers have relevant experience, search for what other users and analysts have to say about the platform, and get a clear understanding of your expectations and the various ways of fulfilling them.

Creatio can become a perfect solution for your organization if you are looking for a flexible and powerful low-code/no-code platform that allows for continuous interconnectivity of people and processes.

Remember that no vendor in this world knows your business as well as you. Do not leave it up to the providers to give you a list of the features you are supposed to like; choose them yourself. Create detailed use cases, calculate how many users will enter your platform every day, determine how fast you would like to see a return on your investment, and so on. With so many options out there, always choose the one that fits your **individual** needs and requirements like a glove. Low-code/no-code is already here, and its core focus is on turning organizations into digital leaders to help them thrive.

ABOUT CREATIO

Creatio blends an intuitive low-code platform, best-in-class CRM and a robust BPM in a single solution. On top of a low-code process automation platform called Studio Creatio, the company offers three CRM products for marketing, sales and service. These products can be sold and used separately or bundled.

The future is no-code, where everyone can be a developer. The world of business doesn't require the expansion of IT departments, but rather the encouragement of citizen developers via the implementation of low-code platforms. In the modern era, anyone can be a developer–a citizen developer–and the companies they work for will reap the benefits.

CREATIO SUPER POWERS
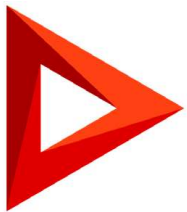
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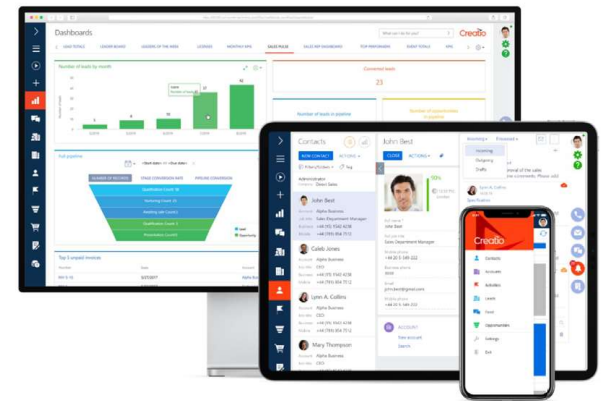to change processes faster
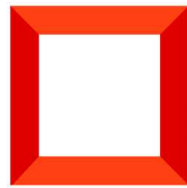
LOW-CODE PLATFORM
to make everyone a developer

UNIFIED CRM
to align sales, marketing and service

Empowering mid-size and large enterprises to accelerate operational & customer facing processes

TRY IT FREE