

**EXPERTISE-SHARING SESSION**

# **Creatio on Creatio: Top 5 AI Use Cases Our Sales Team Loves**

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# Session flow

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01

**Our internal sales  
automation approach**

02

**MEDDPICC as the operating  
backbone**

03

**Top 5 AI use cases in daily  
seller workflow**

04

**Practical takeaways for  
customers and partners**

# We use what we preach: 'Guided Selling'

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- One platform for sales process, pipeline discipline, partner process and execution visibility.
- Automation that reduces administrative work and increases consistency.
- AI embedded into the seller workflow, not sitting outside it.
- Methodology and CRM behavior connected through MEDDPICC.

## Stage-gated sales execution

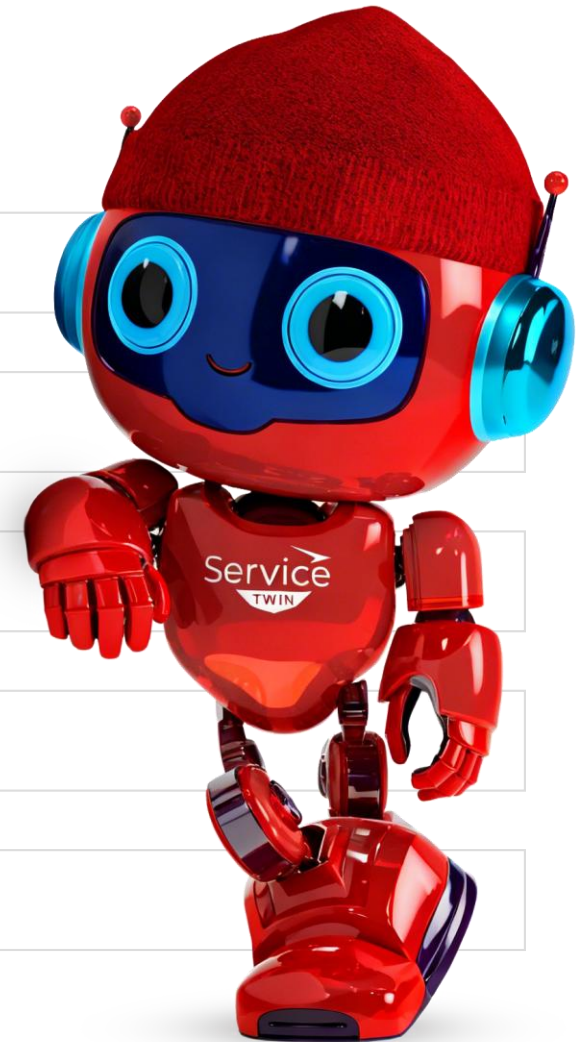
<b>Discover</b>	Fit, pain, timing
<b>Develop</b>	Value and stakeholders
<b>Prove</b>	Validation and proof
<b>Contract</b>	Commercial alignment
<b>Closed</b>	Win/loss learning

## We use Creatio internally to prove what is possible:

A more automated, intelligent, and disciplined sales motion from first conversation to closed win.

# Top 5 AI use cases our sales team loves

- |   |  |  |
|---|--|--|
| 1 | <b>MEDDPICC automation</b>               | Methodology embedded into opportunity execution  |
| 2 | <b>Opportunity summaries + AI agents</b> | Fast deal context in Creatio, Outlook, and Teams |
| 3 | <b>Opportunity next steps</b>            | Guided selling aligned to stage and risk         |
| 4 | <b>AI-recommended success stories</b>    | Relevant proof points and customer-ready emails  |
| 5 | <b>Transcripts + pricing advisor</b>     | CRM updates, sentiment, and quote guidance       |



# MEDDPICC automation



The methodology is built into how we inspect, coach, and advance pipeline.

- Fields, stages, and scorecards reinforce qualification discipline.
- Managers inspect deal quality against consistent criteria.
- Opportunity views become coaching systems, not static records.

The screenshot displays the Creatio CRM interface for a sales opportunity named "North Pole". The interface is organized into several key sections:

- Header:** Shows the opportunity name "North Pole", a search bar, and navigation icons. A progress bar at the top indicates the current stage is "2. Develop" within a pipeline that includes "1. Quality", "2. Develop", "3. Prove", "4. Contract", and "Closed won".
- Strategic Deal Alert!** A prominent orange banner at the top left.
- Opportunity Metrics:** A purple section containing key financial and operational data:
  - ARR bookings, \$: 200,000.00
  - Expected closed on date: 7/31/2026
  - Value of the last quote, \$: 0.00
  - Deal status: Work in progress
  - Total contract value, \$: 600,000.00
  - Selection status: Early stage
  - Customer type: New customer
- MEDDPICC Score:** A purple section featuring a circular gauge showing a score of 34 out of 40.
- Key Performance Indicators (KPIs):** A row of four blue boxes:
  - Days in funnel: 118
  - Days at current stage: 9
  - Total meetings with Account: 2
  - Last meeting with Account: 2/10/2026
- Navigation and Tabs:** A horizontal menu below the KPIs includes tabs for "UIDED SELLING", "MEDDPICC" (which is active), "KEY PLAYERS", "CLOSING PLAN", "SOLUTIONS CONSULTING", "QUOTES", and "TIMELINE".
- MEDDPICC Methodology:** A visual representation of the MEDDPICC acronym using colored boxes with letters and progress indicators:
  - M (Market): 4/4
  - E (Economic): 4/4
  - D (Decision): 5/5
  - D (Decision): 4/4
  - P (Process): 5/5
  - I (Influence): 3/3
  - C (Champion): 5/5
  - C (Champion): 4/4
- Metrics Section:** A section titled "Metrics" with a sub-header "M" and a progress indicator of 4/4. The text below reads: "We have identified metrics, validated them with multiple stakeholders, and showcased how our solution can help achieve the expected impact. We have shared a business case with the customer."
- Left Sidebar:** A vertical list of fields for the opportunity:
  - Name: North Pole
  - Account: North Pole
  - Type: Partner sale
  - Source: Partner
  - Region: Americas
  - Subregion: LATAM
  - Primary lead: Fusion (CRM+Workflow) / No...
  - Customer need: Fusion (CRM+Workflow)
  - No. of users: 30
  - Self-implementation:
  - Probability, %: 40
  - Created on: 2/5/2026

# MEDDPICC automation



The methodology is built into how we inspect, coach, and advance pipeline.

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- Managers inspect deal quality against consistent criteria.
- Opportunity views become coaching systems, not static records.

The screenshot displays the Creatio interface for a 'North Pole' opportunity. The top navigation bar includes the Creatio logo, a search bar, and various utility icons. The main header shows the opportunity name 'North Pole' and a 'Close' button. Below the header, there are several key performance indicators (KPIs) in blue boxes: 'Days in funnel' (118), 'Days at current stage' (9), 'Total meetings with Account' (2), and 'Last meeting with Account' (2/10/2026). A navigation menu below the KPIs includes 'UIDED SELLING', 'MEDDPICC' (highlighted), 'KEY PLAYERS', 'CLOSING PLAN', 'SOLUTIONS CONSULTING', 'QUOTES', and 'TIMELINE'. The main content area features a visual representation of the MEDDPICC methodology as a sequence of colored boxes: M (green, score 4), E (green, score 4), D (green, score 5), D (green, score 4), P (green, score 5), I (orange, score 3), C (green, score 5), and C (green, score 4). Below this sequence, a 'Metrics' section provides a detailed view of the 'M' (Market) metric, including a score of 4 and a 'CHANGE' button. The text in the Metrics section states: 'We have identified metrics, validated them with multiple stakeholders, and showcased how our solution can help achieve the expected impact. We have shared a business case with the customer.' It also includes a 'Why this score?' section with the text: 'Business metrics have been validated with multiple stakeholders at North Pole. A business case showing the expected impact of CRM has been presented.' and a 'What to do next?' section with the text: 'Refine the financial impact analysis. Obtain executive approval of the business case.'

# Opportunity summaries + AI agents



## AI helps sellers understand deal context and prepare faster.

- Quick deal highlights summarize what matters most.
- Outlook and Teams agents bring CRM context into daily workflow.
- Sellers spend less time searching and more time progressing deals.

North America

Primary lead \*  
CRM (marketing, sales, servi...

Customer need \*  
CRM (marketing, sales, s...

No. of users  
400

Self-Implementation ⓘ

Probability, %  
20

Created on  
11/5/2025


Opportunity team ^

Owner \*  
Spencer Stern

Solution Consultant

Executive sponsor

Account info ⓘ ^

 **North Pole**  
Productora Metálica, S.A. de...  
- Mexico

Main type  
Prospect

Days in funnel  
134

Days at current stage  
101

Total meetings with Account  
0

Last meeting with Account  
N/A

[OPPORTUNITY SUMMARY](#)
[GUIDED SELLING](#)
[MEDDPICC](#)
[QUOTES](#)
[SOLUTIONS CONSULTING](#)
[TIMEL](#)

**Opportunity summary**  
**Overall:** Opportunity is progressing with clearly defined use cases (Lead, Opportunity, Forecasting, Enablement) and documented business pains (pipeline visibility, productivity, tracking).  
**Strengths:** The solution is well aligned with customer needs, and there is active engagement with initial stakeholders. A structured sales approach and defined next steps are in place.  
**Risk:** Moderate — limited multi-threading, no confirmed Champion, and business impact not yet quantified, which may slow decision-making.

**MEDDPICC summary**  
**Status: Mid-level qualification 3/5** — core elements are identified but not fully validated.  
**Metrics & Pain:** Business pains are clear, but quantifiable impact (AS IS / TO BE) is not confirmed.  
**Champion & Economic Buyer:** A potential Champion exists but is not fully validated, and access to the Economic Buyer is limited.  
**Decision:** Decision criteria and process are understood but not yet influenced.

**Next actions recommendations**

- **Prioritize stakeholder alignment** and ensure executive-level engagement
- **Strengthen deal qualification** to reduce risk and improve forecast confidence
- **Validate business value** to support decision-making and justification
- Monitor deal progression and **remove blockers impacting timeline**

**Discovery summary**  
 What is delivery path for the customer?  
 Customization expected / SI Delivery expected

Why change?  
 They are looking for CRM

Why now?  
 Customer has has 20-30 actions now and they're projecting 5,000/ 6,000 sales monthly in 2026. +/- 1.2MM to 1.8MM actions (Annually)

Why our company?  
 Partner-sourced deal

**Opportunity partner** + ↻ ⋮ 🔍

# Opportunity next steps



## AI recommendations help sellers move with precision.

- Next actions align to MEDDPIC and internal sales best practices.
- Guidance adapts to stage, risk, missing information, and deal signals.
- Managers get a clearer coaching path for each opportunity.

The screenshot displays the Creatio CRM interface for an opportunity named "North Pole". The interface is divided into several sections:

- Progress Bar:** Shows the sales process stages: 1. Qualify (green), 2. Develop (green), 3. Prove (grey), 4. Contract (grey), and Closed won (grey).
- Strategic Deal Alert!** A prominent orange banner.
- Opportunity Metrics:** A purple box containing key financial and operational data:
  - ARR bookings, \$: 200,000.00
  - Expected closed on date: 7/31/2026
  - Value of the last quote, \$: 0.00
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  - Selection status: Early stage
  - Customer type: New customer
  - Forecast:
- MEDDPIC Score:** A purple box with a circular gauge showing a score of 34 out of 40.
- Summary Cards:** Four blue cards providing additional metrics:
  - Days in funnel: 118
  - Days at current stage: 9
  - Total meetings with Account: 2
  - Last meeting with Account: 2/10/2026
- Closing Plan:** A table detailing the steps to close the deal:
 

Step	Status	Date
1 Verbal received	To Be Done	
2 Partner aligned and confirmed on scoping and budget	To Be Done	
3 Executive alignment / approval	To Be Done	
4 Board approval	To Be Done	
5 Vendor onboarding questionnaires and paperwork	To Be Done	
- AI Recommendations Panel:** A sidebar on the right titled "Next Best Action Recommendation Strategy" providing detailed guidance:
  - Next Best Action:** Quantify the business impact of North Pole's challenges and link each pain point to specific CRM capabilities. Present a refined financial analysis to key executive stakeholders within two weeks.
  - Rationale:** While North Pole's business pain is well articulated and competitors are identified, the expected impact is not fully quantified and the financial business case requires executive approval. This will strengthen justification for CRM selection and drive deal momentum.
  - Supporting Details:**
    - Strong Areas:**
      - Champion (5): Head of Sales Operations is actively supporting the CRM initiative and facilitating access. Next Step: Equip them with specific success stories to share internally.
      - Decision Criteria (5): Evaluation priorities (usability, AI, integration) align fully; customer agrees with CRM's fit. Next Step: Validate each criterion's importance with the buying committee.
      - Paper Process (5): Procurement steps/timelines known, with personal commitment to deadlines. Next Step: Initiate early engagement with legal/procurement.
    - Weak Areas:**
      - Impact of the Deal (7): Impact is recognized but...

# AI-recommended success stories



## Creatio helps sellers find the right proof point at the right moment.

- Knowledge Hub content recommended based on customer context.
- AI drafts relevant customer-facing emails.
- Attachments and proof points are packaged faster for follow-up.

The screenshot displays the Creatio interface with a customer record for 'North Pole' and a Knowledge Hub article. The customer record includes the following details:

- Created on:** 2/5/2026
- Opportunity team:**
  - Owner: Hanna Trempoltceva
  - Solution Consultant
  - Executive sponsor
- Account info:**
  - North Pole (Productora Metálica, S.A. de... - Mexico)
  - Main type: Prospect
  - Web: 58218A92-756C-1506-9081-FAC5C93...
  - Primary phone: 1077708009
  - Segment: 2. Corporate
  - Industry: Manufacturing & Distribution
  - Owner: Supervisor

The Knowledge Hub article, titled 'Sales Knowledge Hub Agent Management', provides the following information:

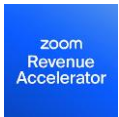
- Sales Knowledge Hub Agent:** Here are recommended customer success stories in manufacturing, based on verified outcomes with Creatio.
- How Creatio Empowers Manufacturers:** Creatio's unified no-code platform enables leading manufacturing organizations to connect sales, service, supply chain, production, and partner operations in a single, AI-native environment. Key benefits demonstrated by real customers include reduced manual work, greater process visibility, enterprise-wide automation, and accelerated production flows.
- Featured Manufacturing Successes:**
  - Wizard International (Wizard International (United States))**
    - Only U.S.-based manufacturer of Computerized Mat Cutters (CMC) with 20,000+ rented equipment units worldwide.
    - Results:** Case processing time reduced by 2x, overdue equipment reduced by 40%, and global asset visibility centralized.
    - How Creatio Helped:** No-code process automation, consolidated five internal systems, automated rental workflows, asset tracking at scale.
  - Hershey's Ice Cream (Hershey's Ice Cream (United States))**
    - Operates 40 distribution centers, serving over 33,000 customers.
    - Results:** 32% less admin work, 22% boost in...

# Call transcripts + CRM updates



**The seller should not have to choose between customer presence and CRM accuracy.**

- Call transcripts feed notes, actions, sentiment, and MEDDPIC updates.
- Planned workflow: CRM updates happen automatically after calls.
- Outcome: better data quality with less manual entry.



The screenshot displays a CRM interface for an opportunity in North America. Key metrics at the top include: Days in funnel (134), Days at current stage (101), Total meetings with Account (0), and Last meeting with Account (N/A). The opportunity is titled 'North Pole' and is owned by Spencer Stern. The summary section, titled 'Last meeting AI summary', notes that 2 meetings were selected and discusses CRM system expectations and challenges. It lists decision criteria (platform capabilities, alignment with business requirements, implementation timeline, and total cost of ownership) and a decision process (internal evaluation followed by senior manager approval). The summary also includes owner notes from Jake Lee, Group Head of Transformation, regarding technology investment and timelines. A progress bar at the bottom shows the current stage as 'DISCOVER' with 2/6 items ready and 4 to be done. The progress items are: Use cases identified (failed), Metrics identified (completed), Pains identified (completed), CEO identified (failed), Discovery summary (failed), and Discovery follow up email (failed).

# AI pricing advisor



## AI turns customer needs into better commercial guidance.

- Recommends products and packaging based on requirements.
- Generates quote templates for faster sales execution.
- Supports consistency across complex enterprise conversations.

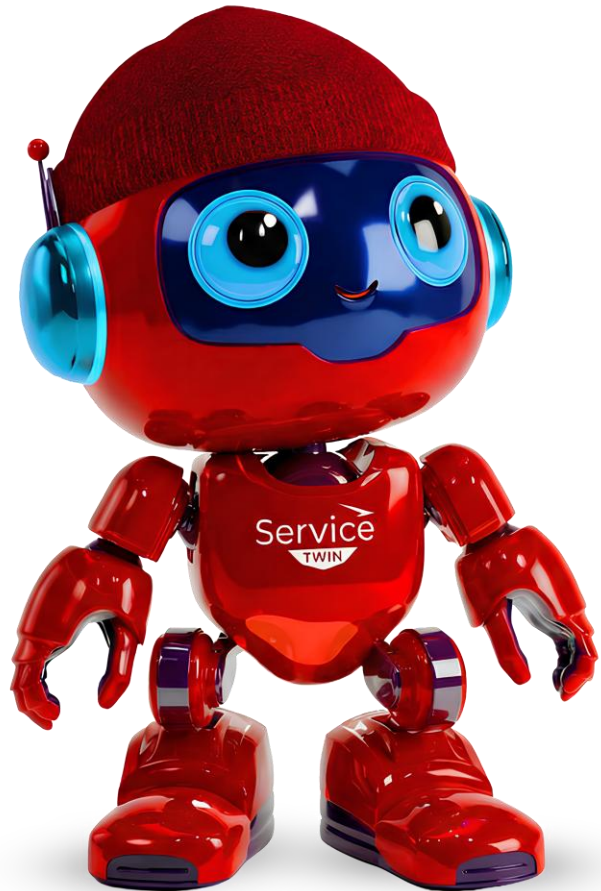
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- Closing Plan:** A table detailing the steps of the closing process:
 

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- AI-Based Pricing Strategies:** A sidebar panel on the right titled "AI-Based Pricing Strategies" provides recommendations based on user inputs:
  - Sales Knowledge Hub Agent:** Based on your inputs:
    - Customer profile: SMB
    - Number of users: 100
    - Main AI use case: Support requests (e.g., case routing, ticket triage, automated replies, summaries)
  - Recommended Package:**
    - START:**
      - Annual Price: \$5,000 / year
      - Included Actions: 25,000 AI Actions / year
      - User Limit: Designed for SMBs (no hard user cap, but suited for smaller deployments)
      - Model access: OpenAI models only
      - Portal/External User AI: Not supported at START. If you need AI usage for support portals or external community, consider Grow.
    - Upgrade Path:**
      - If your AI usage grows (e.g., higher support volumes, more automations):
        - GROW: \$25,000 / year — 125,000 AI Actions / year**, access to Creatio's full managed LLM catalog (OpenAI, Claude, Gemini...), portal support, better fit for future expansion.

# Why it matters

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## Time saved

Less manual research, recap writing, and CRM updating

## Stronger coaching

Managers see risk, gaps, and next actions faster

## Better consistency

MEDDPIC and best practices show up in daily execution

## Focus

More customer time, less administrative drag

# The takeaway

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AI is most powerful when it is embedded directly into the seller workflow.

Methodology, automation, and AI should reinforce one another.

The CRM becomes more than a system of record. It becomes a system of execution.

Creatio on Creatio gives us a real operating model to share with customers and partners.

**We use what we preach: AI-native & No-Code automation that helps sales teams move faster with better discipline.**

**Thank you!**