Creatio

BLUE CROSS®

Founded in 1946, Saskatchewan Blue Cross is an independent Saskatchewan owned not-for-profit organization focused on providing comprehensive health care coverage for residents. The company prides itself on being one of Saskatchewan's Top Employers and one of the Top 100 companies in Saskatchewan.

PRODUCT:	INDUSTRY:	REGION:
Sales Creatio, Marketing Creatio, Service Creatio	Insurance	Canada

CHALLENGE:

Saskatchewan Blue Cross was falling behind on meeting customer expectations for service and technology. Without having a powerful low-code development system for process automation and CRM, the company couldn't create data-driven operational improvements strategy or bring products to market in a timely manner. Additionally, process inefficiencies made it difficult to gain new customers, which was causing staff frustration.

The company had the following requirements for its new software:

- A highly scalable system to support the organization growth
- A fully-fledged solution with wide customization capabilities that meets all key business objectives and serves as a single data source
- Rich reporting and analytical tools
- Intuitive UI enabling fast user adoption
- The ability to support various integrations

SOLUTION:

- An end-to-end sales management software with dynamic case management framework allowing users to build AI-enabled solutions
- Customized lead management workflows and automated sales funnel
- A tailored sales visit management solution
- A tool for standardized request for proposal (RFP) management
- An optimized internal approval and sign-off management process
- An agile bid proposal management and price negotiations processes with various workflow scenarios based on pre-configured business rules
- Marketplace extensions for optimized data entry and deduplication, such as advanced field patterns and lookup records merging add-ons
- A map widget enabling employees to display and sort data by location on a map
- Tailor-made dashboards to deliver comprehensive performance analytics based on key business needs

BUSINESS OUTCOMES:

Rapid ROI thanks to fast deployment

Utmost operational transparency

Employee performance improved by 25%

Creatio was implemented by Solutions Metrix, Creatio's trusted partner. Creatio solutions help SBC gain a competitive advantage through increased operational efficiency and improved sales velocity, as well as boost customer retention. The company aims to leverage the low-code/no-code functionality of the platform further to create custom solutions for their business and maximize the benefits of Creatio solutions.

ACCELERATE