SAASAM GROUP

SaaSam Group operates in the SaaS industry, specialising in Contract Lifecycle Management (CLM) and Customer Relationship Management (CRM) solutions. The company helps organisations streamline operations, improve efficiency, and enhance compliance.

OBJECTIVE

SaaSam implemented Creatio CRM to optimize customer relationship management, enhance sales processes, and improve service delivery. The solution centralised customer data, automated lead management, and streamlined workflows to foster stronger engagement and improve efficiency.

SOLUTION

SaaSam selected Creatio CRM for its flexibility, no-code customization, and powerful automation features. The solution offered:

- Sales Automation: Automated lead management, follow-ups, and task assignments.
- Customer Engagement Tools: Personalized tracking of interactions and communication history.
- Advanced Reporting & Analytics: Real-time dashboards and customisable reports.
- Workflow Automation: Streamlined lead routing, approval workflows, and follow-ups.
- Seamless Integration with Agiloft CLM: Improved collaboration and holistic customer insights.
- User-Friendly Interface: Fast adoption with minimal training required.

BENEFITS

- Centralised Customer Data: Create a unified system for seamless information access.
- Automated Sales Processes: Reduce manual efforts with automated workflows.
- Enhanced Customer Engagement: Improve tracking and communication for personalised interactions.
- Improved Sales Insights: Implement real-time reporting for better decision-making.
- Cross-Team Collaboration: Integrate CRM with Agiloft CLM for seamless data sharing..

AT A GLANCE

CHALLENGES

One key challenge was the lack of a prebuilt integration between Creatio CRM and Agiloft CLM. SaaSam's technical team developed a custom integration, ensuring seamless data flow, reducing manual data entry, and enhancing accuracy across systems.

BENEFITS

- 30% Reduction in Manual Tasks: Workflow automation streamlined processes.
- Improved Sales Efficiency: Faster lead management and follow-ups.
- 100% Data Integration: Enhanced collaboration between Creatio CRM and Agiloft CLM.
- Better Customer Engagement: Personalised tracking and improved communication.
- Real-Time Reporting: Actionable insights for data-driven decision-making.

CONCLUSION

SaaSam CEO

Creatio CRM improved SaaSam's customer management by automating sales, enhancing data visibility, and boosting efficiency. Integration with Agiloft CLM streamlined workflows, enabling a more personalized client experience.

For more information on how SaaSam can streamline your contract management and help achieve your business goals, visit SaaSam Group at www.saasamgroup.com