



MARKETING ACTIVITIES

RECOMMENDATIONS FOR PARTNERS

APRIL 2021

Creatio 1. SHARE NEWS AND UPDATES ON SOCIAL MEDIA

1. Follow Creatio social accounts with your professional and/or personal accounts:



[LinkedIn](#)

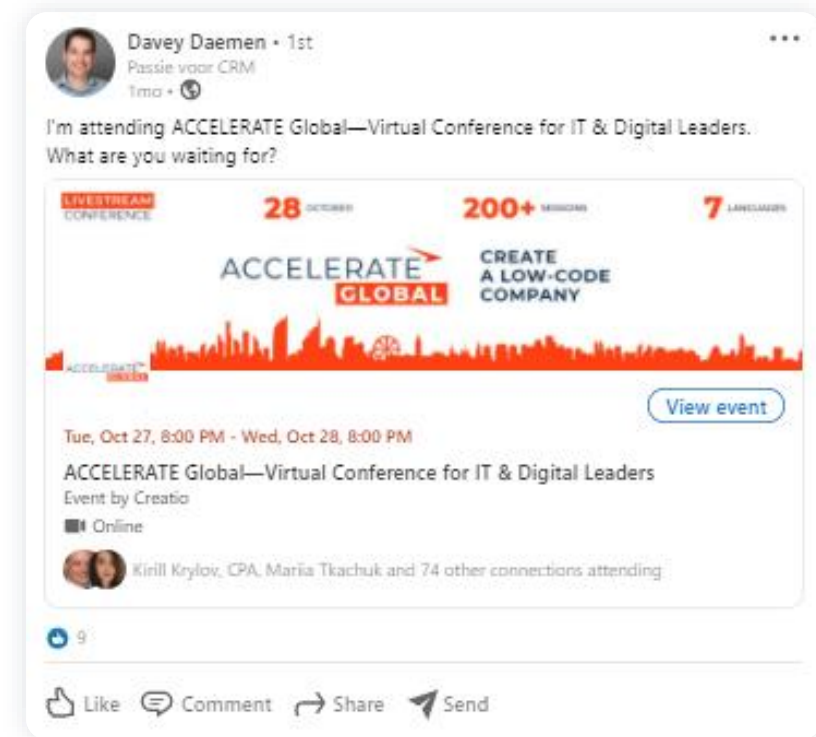


[Facebook](#)



[Twitter](#)

2. Switch on email notifications to get regular updates of new posts from Creatio. Here is how to do it in [LinkedIn](#), [Facebook](#) and [Twitter](#).
3. Publish and share posts relevant to your audience in English or your native language. Use relevant hashtags like: #Creatio, #low-code, #CRM and etc.



1. Find groups about technology, digital transformation or operational excellence. Here you can find a suggested [shortlist of groups](#) in English
2. Request to join one or several groups and wait to be accepted
3. Start conversations and respond to others
4. Maximize benefits from your conversations:
 - Connect on LinkedIn with fellow professionals you have conversed with
 - Suggest group members through leadership content and events where appropriate
 - Don't be promotional or salesy – build trust and establish relationships



Bookmark & visit regularly [Creatio Insights](#)

1

Send emails to your database:

- Include links to landing pages
- Target relevant audiences
- Send emails at least once a week
- Keep in mind GDPR rules

2

Check leads generated in partner portal and follow up on them within one week

3



Make sure to use your **partner tag** when publishing links to Creatio content so you get notifications about new leads

**HERE IS AN EXAMPLE
OF URL WITH PARTNER TAG:**

<https://www.creatio.com?partner=NAME>

If you don't know your tag, contact Creatio Manager

Who are warm contacts?

- People who have filled out a form on your website or Creatio.com
- Your social media followers or identifiable visitors to your website
- Those who contacted you first via chat, email or phone

What to contact them about?

- Be upfront to describe what you offer and whether there may be a need for it
- Propose a discovery call to present Creatio and find out about prospect goals
- Keep nurturing contacts with emails, but only if there is business potential in the future

Check out these examples of scripts to guide your calls and emails to warm prospects:

1. [General phone script](#)
2. [Creatio presentation demo](#)
3. [Financial services email templates](#)
4. [Manufacturing email templates](#)

WHAT?

- Articles
- Blog posts
- eBooks
- Reports

ABOUT?

- Digital transformation
- Low-code/No-code
- Process automation
- CRM technologies

WHERE?

- On your own website
- As a guest contributor to online media
- As a sponsor of online media

USEFUL TIPS:

1. Use forms to collect contact data for leads
2. Optimize your blogs for SEO using relevant keywords and meta titles
3. Establish editorial relationships with online media that accepts guest contributions

[Visit Creatio Insights to get inspired about formats & topics](#)

Google offers display and search advertising that works well to grow brand awareness. Check out this [detailed guide](#) to learn more



facebook Ads

Facebook ads can be effective in generating leads, though the quality of them can be low. Get started [here](#)

LinkedIn allows you to reach the relevant business audiences, but ad costs can be high. Start with LinkedIn ads [here](#)

Linked in ads



Twitter ads are short and sweet, but can generate valuable leads. Here is [Twitter's 101](#) on ads campaigns

You can engage multiple types of organizations to help you grow Creatio brand awareness and generate leads. Here are just a few examples of English language organizations that may offer relevant marketing services:

TECH MEDIA

- [TechRadar](#)
- [PCMag](#)
- [Techzine](#)
- [TechCrunch](#)
- [ComputerWorld](#)
- [KMWorld](#)
- [DestinationCRM](#)

INDUSTRY & PROFESIONAL MEDIA

- [AutomationMag](#)
- [Financial IT](#)
- [HealthTech](#)
- [Call Centre Helper](#)
- [MartechCube](#)
- [SellingPower](#)

REVIEW WEBSITES

- [G2 Crowd](#)
- [Capterra](#)
- [Software Advice](#)
- [Alternative](#)
- [GetApp](#)
- [IT Central Station](#)
- [TrustRadius](#)

ORGANIZATIONS & COMMUNITIES

- [IEEE Computer Society](#)
- [COO Forum](#)
- [Process Excellence Network](#)
- [Spiceworks](#)
- [Business 2 Community](#)

AGENCIES

- [Aberdeen](#)
- [Growthonics](#)
- [IronPaper](#)
- [WebFX](#)
- [Uplers](#)
- [LucidAgency](#)

NOTE: Creatio does not promote the specific companies nor do we guarantee any specific results for collaborating with them. The listed third parties are shown only as examples of types of organizations, which offer marketing services.

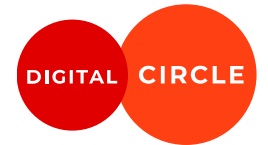
ORGANIZE EVENTS

- Use existing English content from Creatio to do events in your language or develop your own content
- Let us know when you will host the event so we can promote with our channels

CO-ORGANIZE WITH CREATIO

- Plan format and content together with Creatio
- Bring in a speaker and promote the event with you channels
- Creatio will share 50% of leads generated relevant for your region

VIRTUAL EVENTS FORMAT



[Find more details about organizing and co-organizing Creatio events here](#)

Consider events to participate in by exploring the event formats

1

Contact partner marketing to express interest in being a speaker

2

Prepare with content and dry runs

3

Participate in the live session and connect with participants*

4

*We will share the list of registrants from the event and agree together which ones you will contact



Creatio 10. GENERATE SUCCESS STORIES

Get approval from customer or prospect

Confirm customer willingness to share their story publicly and under what conditions

Let us know about the opportunity

Contact your Partner Account Manager or marketing to let us know about an opportunity for a customer case study

We co-develop content in a written and/or video formats

We can write the case study based on an interview with a customer as well as record and edit a video interview



Ent Credit Union

FINANCIAL SERVICES

388,000 MEMBERS

\$6.9B AUM

ENT CREDIT UNION UTILIZES LOW-CODE TECHNOLOGIES TO IMPROVE AND ENHANCE MEMBER AND EMPLOYEE EXPERIENCE

Ent Credit Union is a not-for-profit, community-chartered credit union focused on improving the financial life of all Coloradans. As a leading credit union in the state, the company has over 388,000 members and more than 35 service center locations.

PROJECT HIGHLIGHTS

3 months of deployment	875 users across the company's various teams	A unified IT ecosystem of Creatio solutions, the core banking system, document storage, and CTI system.
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CHALLENGES

Ent Credit Union had an aspirational plan to expand in the Colorado region. Being highly dedicated to its members' experience, Ent Credit Union was also looking for the solutions to improve member and employee communication. The company wanted to deepen member relationships and increase the level of engagement of those who joined Ent Credit Union as a result from third-party sales. To this end, Ent aimed to deploy a next generation CRM software. The company required a flexible and nimble system to be able to evolve as the company's needs change.

Ent Credit Union required the following:

- A highly scalable system to support dynamic business growth
- Robust tools for large-scale customer-facing processes automation, from lead automation and B2B sales to teller automation.
- Effective tools to maintain a high level of customer engagement including advanced complaint ticketing system and omnichannel communications solutions that support both text and chat functionality
- A rapid system deployment with a minimized impact on the company's IT team workload