Creatio
formerly bpm'online

Implementing a low-code strategy in 2020:

TOP TIPS FOR
BUSINESS LEADERS

E-BOOK

Creatio

#1
ABOUT
LOW-CODE

Low-code technology has become the latest and greatest trend for companies looking to digitally transform their business and stay competitive. However, not all low-code platforms are created equal, and navigating the low-code market can be overwhelming. To ensure you're making the best possible investment into the right platform, you need a foolproof strategy along with an understanding of low-code, its benefits, and what a good low-code platform should be bringing to the table for your business.

WHAT IS LOW-CODE?

Low-code technology refers to software that enables the development of applications and solutions with little to no professional coding required. Using intuitive visual interfaces and simple logic, low-code platforms allow almost anyone to begin developing even if they are not an IT expert. The term "low-code" was first used by Forrester to describe software platforms that allowed users to create and develop applications with visual tools.

Instead of using traditional coding, low-code uses drag-and-drop features and simple if-then logic along with preconfigured modules to develop. Though coding can still be used to customize and create more complex applications, a person with no formal knowledge of software development can use it easily. In addition to being easier to use, low-code technology also makes development much faster for both "citizen developers" (non-professional developers) and IT experts alike.

65% 65% of application development activity will be low-code by 2024. (Gartner)

40% The market for low-code platforms is growing by an estimated 40% annually, with spend expected to surpass $21 billion by 2022. (Forrester)

Creatio

#1

ABOUT
LOW-CODE

> **"** *The market demand for application development will only keep rising and to meet the growing expectations of customers for a seamless digital experience, companies need to embrace new technologies. Low-code will be an important technology in the future where companies can transform their business rapidly and effortlessly.*

Sujeeth Shetty, VP of Business Development, AgilizTech

WHAT ARE LOW-CODE PLATFORMS USED FOR?

For businesses, the adoption of a low-code platform creates opportunity for employees in any department to begin creating their own solutions to automate their work. These non-professional developers are known as "citizen developers," and they can play a key role in digitally transforming a business when equipped with the right platform that is easy to use. Whether it be document flow automation for an HR employee or a tax preparation process for finance, low-code platforms help create the needed solutions for a company to become as efficient as possible and digitally transform.

WHAT ARE THE BENEFITS OF LOW-CODE?

Low-code technology is favorable for businesses in several industries (e.g. financial services, manufacturing, real estate) thanks to its numerous advantages. By enabling citizen developers, companies utilizing a low-code platform can expect more solutions faster than traditional IT development. Additionally, investing in a low-code platform allows companies to avoid spending more on the expansion of their IT department as citizen developers take on the task of creating apps. Professional developers can enjoy a workload that is less overwhelming and spend their time on more important tasks such as security, maintenance, and the development of larger projects, and learning how to use a low-code platform will allow them to create solutions faster as well.

70%

By 2020, 70% of enterprises will have citizen development policies in place. (Gartner)

75%

By 2024, 75% of large enterprises will be using at least four low-code development tools for both IT application development and citizen development initiatives. (Gartner)

2021

Through 2021, market demand for app development will grow at least five times faster than IT capacity to deliver it. (Gartner)

Creatio

#1

ABOUT
LOW-CODE

7 REASONS WHY BUSINESSES NEED TO USE A LOW-CODE PLATFORM

Faster time to market and accelerated app delivery	Reduced cost	Improved CX (customer experience)	Uncompromising security
Helps to eliminate Shadow IT	Fluid business and IT collaboration	Boosts digital transformation	

> *Smart low-code platforms make the development lifecycle more seamless and enable developers to easily prototype and iterate. Low code focuses on making app development simpler and quicker.*

Dick Wooden, Founder & President, Success with CRM

10x
Low-code platforms can make software development as much as 10x faster than traditional methods. (Forrester)

200 000
There are over 200,000 software developer job openings in the U.S. but only about 30,000 computer science majors graduating per year. (DataUSA)

40%
40% of companies have moderate to major skills gaps. The resulting digital inefficiency can be deadly, costing as much as 20% in lost productivity. (Forbes)

50%
In 2020 more than 50% of developers will use a low-code product. (Forrester)

70%
About 70% of IT leaders found that low-code platforms are more affordable compared to traditional development platforms and 80% cited the ability to meet requirements within budget. (CIO)

90%
About 90% of IT leaders find that the flexible design of low-code platforms helps to significantly improve customer experience compared to traditional development platforms. (Forrester)

86%
86 % of IT leaders find low-code platforms help significantly improve customer experience due to their flexible design. (CIO)

80%
Low-code environments are already in use by 80% of developers. (Evans Data survey)

#2

WHAT YOU CAN CREATE WITH LOW-CODE

Low-code platforms provide visual interfaces with drag-and-drop capabilities that allow users to build apps for different business tasks, from customer-facing applications to integrations with third party solutions. Users can create several types of business applications, such as:

- **Customer engagement apps:** Build any enterprise-grade app for different business tasks. These apps can be anything from customer-facing apps to complex business processes for more effective and personalized customer engagements.

- **Operational efficiency optimization apps:** Create applications that automate processes to increase the efficiency of operations. These apps provide several benefits to a business including reduced cost and reduced risk of error through automation.

- **Business processes:** Define workflows and build processes for tasks of any complexity to automate operations across several departments.

- **UI, Data Model & Business Logic** – Define and configure data models, business logic, and UI (user interface) for web applications and mobile devices.

- **AI-bases solutions:** Build applications that use AI and machine-learning algorithms to process data effectively to minimize manual operations and accelerate efficiency.

> " *Low-code will allow businesses employees and departments to gain autonomy from IT, increasing productivity and optimizing efficiency, by developing personalized solutions for themselves and for their clients.*

Nuno Teibão da Silva, Marketing Manager at imDigital

#3

CRAFTING A LOW-CODE STRATEGY

To get the most out of your low-code platform, it is vital to create a winning strategy for selecting the right provider. As one of the first steps, it is recommended to outline exactly what you're looking for and the objectives your business is trying to accomplish well help you understand which low-code platform is best for your needs.

DO:

- Clarify what you want low-code to do for you. There is a plethora of low-code solutions to choose from, so it is essential that your outline exactly what you are looking to accomplish by implementing a low-code platform. What will the role of the platform be within your organization? What delivery goals will you need it to achieve? By understanding exactly what you want a low-code platform to do for your business, you will obtain a better idea of the features you need to prioritize when com paring different solutions.

- Compare your vision and objectives with the features of each low-code platform based on reviews, analyst overviews, and other important guides. Other business users will likely provide useful input that can help you shortlist your potential platforms to try out. Finding patterns within the majority of reviews regarding pros and cons will help you understand the platforms capabilities and possible limitations. You can compare these factors to the features you have prioritized according to your company goals.

- Make sure all departments are collaborating regarding low-code implementation. When trying out and choosing a low-code platform to use, IT should not be the only department involved. End-users from other departments need to give their input in order to choose the right platform for the entire business. The best low-code platform for your organization is one that can be used by any one, IT expert or not. It needs to be suitable for both professional and citizen developers alike in order to support the entire development lifecycle.

#3

CRAFTING A LOW-CODE STRATEGY

- Have a narrow point of view of low-code. Low-code platforms are not just another software your company will use; they are a new way of looking at software development. They have the ability to transform your business into a software company by closing the IT delivery gap and allowing anyone in your company to create apps. They are the key to the creation of numerous solutions your business needs.

- Don't expect IT involvement to vanish entirely. Low-code platforms do allow users to create their own apps with little to no IT expertise needed. IT also benefits greatly from low-code implementation as their backlog decreases when users can develop their own solutions. However, every app needs to be integrated with IT systems at some point. Even if you're using the best low-code platform in the world, there is inevitably going to be a project too large or complex for a citizen developer to complete without some custom code from IT. Low-code does not always mean no IT at all, it means cooperation between IT and citizen developers to close the IT app gap.

*TIP: The best low-code platform for your company will be one that can address your unique business needs and objectives. An excellent low-code platform with numerous features you do not need and will not use might not be worth the investment for your company specifically.

#4

DEFINE

REQUIREMENTS

Defining your requirements involves the following steps:

- Be aware of some terms related to low-code such as aPaaS (application Platform as a Service), hpaPaaS (High-performing application Platform as a Service), citizen developer, and business application. Understanding these terms will help you navigate the software descriptions and understand its features better.

- Ask yourself the following questions:
    - What ROI am I expecting?
    - What are my KPIs?
    - What am I hoping to achieve by implementing a low-code platform?
    - Does it support the full development lifecycle?

- Do not leave it entirely up to the vendor to present key features and making their own list of requirements; they will not have the same perspective that you do regarding your business goals and needs.

- Create detailed use cases for your business and think about the features of low-code that will be most important for your objectives. For example, your company might require advanced features to make complex apps on a regular basis, or perhaps you will focus mostly on automation. Knowing this will give you a good idea about the functionality your platform will need to meet your goals.

- A key aspect of defining your requirements for your low-code platform is to ensure that you are not being too vague nor too specific. If your requirements are vague, nearly every platform vendor will seem like a good fit. However, if you are too specific about your essential features, you may end up with a higher estimate of investment due to the inclusion of features you might not need.

*TIP: Determine 10-12 criteria points for your low-code platform to ensure that when you compare and test your options, the right one will line up exactly with what you are looking for in terms of features and functionality.

Creatio

#4

DEFINE
REQUIREMENTS

LOW-CODE PLATFORM FEATURES:

It is important to create a clear list of essential features that your low-code platform will need to have. Among the key features of a low-code platform are:

Visual Modeling Tools

Out-of-the-box functionality

Drag-and-Drop Interfaces

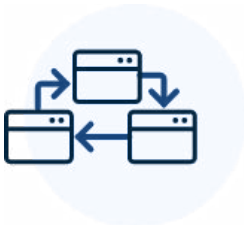Reusability

Cross-Platform Compatibility

Security

Scalability

Reporting and monitoring

Application lifecycle manage-ment

#5

ANALYSTS TO CONSIDER

Another important way to compare various low-code platform vendors is to look at the findings of key analysts. These analysts take a deep dive into each software provider, their platform, the results companies have achieved using the platform, and other important factors that can help you make your decision.

Gartner

Gartner has a yearly analysis of several categories of software called the Gartner Magic Quadrant. Their evaluation is based on reviews, the vendor's market impact, and other key aspects of the vendor that could be helpful to you when considering various low-code platforms.

FORRESTER®

Forrester is a company that evaluates various technology and its impact. They analyze software vendors including low-code platforms, and rate them in an analysis called the Forrester Wave. Checking out the Forrester Wave results for the current year and past years can give you a good idea of what leading low-code platforms are available to you.

#6

REVIEW PLATFORMS TO CONSIDER

In addition to the reviews analysts give to low-code platform providers, finding the reviews of software users can also be a valuable input to help make your decision. There are several websites dedicated to collecting and hosting user reviews of a plethora of software, including low-code software. Below, you can find a few reliable review sites to read:

G2 CROWD

Has reviews for thousands of software providers, and has a very comprehensive review process. Users rate the software out of five stars, and give pros and cons of the platform as well as the vendor according to different subjects the reviewer wants to emphasize. They have a reliable process of ensuring that reviews are genuine, so you can rest easy knowing that what you are reading is the actual opinions and experiences of users. The review platform also gives a general overview of each company and the software they provide.

GARTNER PEER INSIGHTS

In addition to expert evaluations of software, Gartner also collects user reviews for multiple solutions including low-code platforms. Each review goes through a rigorous vetting process to ensure that they are non-biased and informative according to Gartner's standards. This makes Gartner Peer Insights a very trustworthy collection of software reviews that can help you figure out the ins and outs of each low-code platform you are considering based on the experiences other businesses and users have had.

OTHER REVIEW PLATFORMS

A plethora of other review platforms for low-code software exists for you to view. The more user reviews you read, the better of an idea you can get about the various vendors available to you. Software review platforms vary greatly in size and reliability. That being said, here are other trustworthy review platforms you can consider other than G2 and Capterra:

Trust Radius	Info-Tech Software Reviews	GetApp	Capterra	Software Advice

#7

COMPARE PLATFORMS

Once you have a well-defined set of criteria for your low-code platform and have determined the functionalities your business needs, it's time to start comparing and contrasting your vendor options. Low-code platform providers will usually provide a trial of their software for you to test out, which will help you figure out which platform you like best. By demoing the platform, you will get a better idea of its functionality beyond product descriptions.

DO:

- Determine how user-friendly the platform's UX is. A good low-code platform should not have a steep learning curve. The point of a low-code platform is to develop solutions quickly and easily, so its interface should be intuitive and features and functionalities should be relatively easy to navigate. Ensuring your low-code platform's UX is satisfactory will ensure your team adopts the platform quickly and that you see results near-instantly.

- Consider the platform's accessibility. Does the vendor provide a mobile application? Does it have the ability to allow users to collaborate on projects? How accessible your low-code platform is will play a key role in its usability and its ability to address your business needs.

DON'T:

- Have a limited list of vendors to compare. You want to have several low-code platforms to try out to get a good idea of what your options are. Take a deep look into what vendors are out there, or else you might overlook the platform that is a perfect fit for your business.

- Focus on features you don't need. Make sure you keep your list of requirements in mind the entire time you're trying out different platforms based on pre-defined use cases and user personas. Some features a platform has might seem enticing when testing a platform, but in reality would not be used extensively by your team and therefore might not be worth the investment.

#8

SHORTLISTING LOW-CODE PLATFORMS

After you have gone over your requirements, looked through plenty of reviews and evaluations, and tested out several platforms, it's time to shortlist your preferred low-code platform vendors. This is a very important stage of your selection process. Shortlisting platforms can be done by creating scorecards for each platform you have tried. Scorecards are a useful way to review criteria in a balanced manner, and they help align your activities with business strategy.

Key factors to review within your scorecards include:

Implementation: How quickly could you configure the software? Was the implementation process easy, or complicated?

Ease of use: What was the learning curve like for the platform? Did you learn how to use all of its features relatively fast?

Features and functionality: How well did the platform address your outlined requirements? Did you use all of the features, or were there some that you do not need? How well do the features align with your business strategy?

Customer service: How helpful was the vendor during the implementation of the trial? If you asked them questions or had concerns, how well did they address them?

ROI: Is the software worth its cost? Did user reviews and customer cases mention the ROI the company had after implementing the low-code platform?

By assessing all of these factors and rating each vendor on scorecards, you will be able to come to a logical conclusion regarding which platform is the best one for your business goals and needs. To get an accurate overview of all of these factors, it's important to engage with both tech experts and end-users of the platforms you have tried. They will have completely different perspectives on the software, which when combined will give you a comprehensive idea of each factor.

*PROTIP: Don't involve vendors during the shortlisting stage. Their objective is to sell their platform and they will not be able to provide you with an objective overview to compare with other providers.

#9

MAKING YOUR FINAL DECISION

Before coming to a complete conclusion and purchasing a low-code platform, see if you can request a meeting to discuss the platform implementation and a proposal of their project objectives. Hearing their own proposal can help you determine whether your own internal conclusions about whether or not the platform addresses your company's objectives was accurate. Before fully committing to the platform, review case studies of other companies who used the software provider in the past. Getting a good perspective of the vendor's past performance can help you understand exactly what you can expect upon implementing the platform and help you come to a more confident decision.

DO:

- Create deadlines and a reasonable timeframe to make your decision. Ideally, you should have a due date for when your low-code platform should be implemented, and your decision-making timeframe should fit within this overall schedule. In addition to setting a date for making your final decision, now is also a good time to start setting ETAs for different KPIs you have regarding the project implementation and set various stages and goals to meet during the process.

- Discuss with your entire team before choosing the platform. Everyone, including end-users, should be a top priority within your decision-making process. Getting your whole team involved ensures that adoption rates of the platform will be high and the software's implementation will be smooth.

- Get your IT department in contact with your end-users. To get the most out of your low-code platform, citizen developers need to understand the ins and outs of the platform and understand its functionality. Your IT experts will be able to figure out the full capabilities of the platform and be able to explain how to use it to the rest of your end-users. This will also encourage high adoption rates and will ensure you reach your business objectives faster.

#9

MAKING YOUR FINAL DECISION

- Implement the platform without a plan. It can make the implementation process longer if you don't have defined timeframes for certain stages of the implementations. It may also make it harder to reach your objectives for the project if you do not plan out your goals throughout the implementation process, and can make the platform's implementation take longer.

- Select a platform without understanding its capabilities and functionality. It can be difficult to make a plan for the project implementation if you do not have a clear idea of the platform's functionalities or how long it will take to reach certain stages of the software's implementation. Make sure you have researched the software thoroughly and have grasped the general outcomes other companies have had throughout the platforms implementation, and that you have consulted the vendor to hear their own project proposal.

#10

HOW TO FIT LOW-CODE WITHIN YOUR CRM OR BPM STRATEGY

LOW-CODE FOR CRM

There are many opportunities for businesses who integrate low-code into their CRM strategy. The goal of CRM is to improve marketing, sales, and service departments to improve customer relationships, and low-code can help deliver the tools these departments need to do so. Whether it be document automation for contracts or analytical tools to monitor email campaign effectiveness, low-code platforms can allow these departments to create the solutions they need to enhance CRM.

Instead of waiting for IT to deliver these vital apps, any business user with no IT skills like sales rep or HR manager can become a citizen developer and automate the work of their respective department. Some examples of low-code technology applied to CRM are solutions for the following:

- Service request management

- Employee onboarding

- Marketing campaign management

- Industry-specific extensions to CRM, e.g. connectors to Quickbooks, warehouse management tools

Additionally, many connectors, extensions and applications are pre-made and available for low-code CRM users out of the box. This allows for rapid automation of marketing, service, and sales and faster ROI.

LOW-CODE FOR BPM

BPM is a focus area for low-code technology. BPM software aims to automate and optimize workflows and business processes, enhancing productivity throughout an organization. Low-code allows users to work much faster by taking out the complexity of building and optimizing the business processes and workflows. Some benefits of the synergy of low-code and BPM technologies combined on one platform:

- Ability to effortlessly design, run and optimize both structured and unstructured processes of any complexity

- Users can design applications with natively integrated process management capabilities which increases their effectiveness and extends potential use cases

- Reduces the need for IT involvement to enable faster process development

Using low-code, citizen developers can create solutions to solve their everyday business problems at a rapid pace. Aspects of BPM that can be tedious or difficult such as process documentation can be done automatically. The usage of a universal development language that low-code provides allows everyone to contribute and collaborate on processes, identifying potential bottlenecks and truly optimizing processes. As BPM software optimizes processes, integration of low-code optimizes the BPM software and its usability.

ABOUT CREATIO

Creatio (formerly bpm'online) is a global company leading in the space of low-code, process automation and CRM. The company has been highly recognized as a market leader by key analysts. With its unique synergy of an intelligent low-code BPM platform and unified CRM, Creatio accelerates marketing, sales, service, and operations of companies and partners around the world. Creatio's mission is to help companies ACCELERATE!

"

The combinations of low-code in Creatio with its foundation based in BPM (business process management) will allow about any sized business to accelerate their transformation from 'just good enough' to being 'fantastically great', for years to come.

– Dick Wooden, Founder & President of Success with CRM Consulting
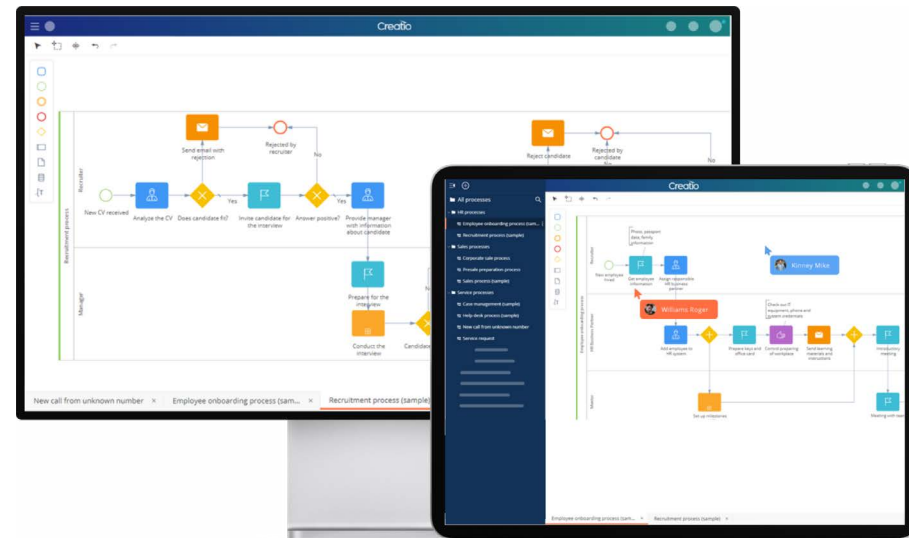
Intelligent low-code and process management platform with out-of-the-box solutions and templates

Try it free

www.creatio.com   info@creatio.com   USA: +1 617 765 7997   UK: +44 20 3384 0040   Australia: +61 261 452 888