



The AI-Native CRM Buyer's Guide

How vendors dress up legacy AI as AI-native — and how to tell the real thing from a demo script.

4 Capabilities to Test Before You Sign

✓ 4 Capability Checks ✓ Red-Flag Checklist ✓ 5-Minute Read

60+

Creatio Migrations
Delivered

100%

Adoption Within 90 Days

10th

Year Creatio Named a
Gartner® Visionary



Every Vendor Says "AI-Native." Most Don't Mean It.

Your current CRM predates AI. You know that's costing you.

The harder problem: every vendor you talk to next will call their platform "AI-native." Most don't mean it.

Most CRMs were built a decade before generative AI existed. Vendors bolted on a chat assistant, called it a day, and raised the price. It can summarize a case. Draft an email. That's not AI-native — that's a feature on an old foundation, the same trap you're trying to leave.

This is how to check whatever you replace it with, whichever platform you land on. Four things to test. Here's how to tell the real thing from a demo script.

|| A CRM that watches your pipeline isn't the same as one that acts on it. That's the entire test.

WHAT THIS GUIDE COVERS

01
Natural-Language
Interface

02
Embedded AI
Agents

03
Unified
Predictive,
Generative &
Agentic AI

04
No-Code AI
Configuration

Interfaces & Agents

1 Natural-Language Interface

"Just ask it anything."

Every CRM has a search bar with autocomplete now. That's not natural language. Real natural-language AI answers a question nobody scripted for you — *"show me every account at risk of churn that hasn't been touched in 30 days."* Fake natural-language AI answers the ten questions the sales engineer rehearsed, and breaks the moment you go off-script.

WHAT TO CHECK

Ask your own question, live. Not theirs.

2 Embedded AI Agents

"Our AI Agents do the work for you."

Most "Agents" are chatbots with a new title. They answer a question, route a ticket. Finishing the job — updating the record, triggering the workflow, closing the case — still needs a human to step in halfway.

WHAT TO CHECK

Ask them to resolve one case, start to finish, zero handoff. Watch where it breaks.

Unified AI & Real Configuration

3 Unified Predictive, Generative & Agentic AI

"AI runs through the whole platform."

Everywhere isn't connected. A predictive score in the pipeline. A drafting tool in the inbox. A bot in support. Three tools, three teams, no shared logic. The real version: one system predicts the churn, drafts the outreach, and lets an Agent act on it — same data, same understanding, not three tools stitched under one login.

WHAT TO CHECK

Ask if the AI predicting churn is the AI drafting the outreach. Watch the pause.

4 No-Code AI Configuration

"Your team configures it — no engineers needed."

"No-code" often means one toggle on one feature. Changing what the AI prioritizes or how it behaves usually means a services ticket, sometimes a project — the same subscription trap you're leaving.

WHAT TO CHECK

Have a business user, not their engineer, change how the AI behaves, on the spot. If that needs a support call, you have your answer.

Red Flags Worth Knowing

- ▲ The natural-language demo only works on rehearsed questions
- ▲ "Agent" and "bot" used interchangeably
- ▲ AI features built years apart by different teams, no shared logic
- ▲ No-code configuration still on a roadmap slide
- ▲ Any AI claim with no number behind it

How to Use This Guide

You don't need to memorize four sections walking into a demo. Just ask the "what to check" question under each pillar — then watch what happens when the rep has to go off-script.

That's usually all it takes to find out what you're really buying.

Score the Demo

OPTIONAL — USE LIVE IN THE ROOM

1. Natural-Language Interface	☐ Yes	☐ Partial	☐ No
2. Embedded AI Agents	☐ Yes	☐ Partial	☐ No
3. Unified Predictive/Generative/Agentic AI	☐ Yes	☐ Partial	☐ No
4. No-Code AI Configuration	☐ Yes	☐ Partial	☐ No

4 Yes: AI-native 2–3 Yes: AI-assisted, not AI-native 0–1 Yes: Legacy CRM in disguise

WHERE THIS LEADS

Where Creatio Fits

Run these four checks against most platforms and the gap becomes clear. Creatio is built as a unified AI-native platform from the ground up — not a legacy CRM with AI added later.

Choosing the platform is half the decision. Execution is the rest: migrating data without losing history, configuring AI to match how your team works, building trust in a system that now decides, not just logs.

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Consecutive Year Creatio Named a Gartner® Visionary

That's our practice — guided by our **PATH TO OUTCOME™** methodology:

P

Plan

A

Align

T

Transform

H

Harness

If you're evaluating Creatio — or weighing it against alternatives — we welcome an independent perspective on what you're seeing in a demo.



Certified Creatio Implementation Partner

FREE TOOL

See what your legacy CRM is really costing you. Takes 2 minutes.

Calculate Your Savings → unshacklai.com

TALK TO US

Get a tailored migration plan from your legacy CRM — no obligation.

Book an Assessment → unshacklai.com



About B-TRNSFRMD

B-TRNSFRMD reimagines how organizations deliver Customer and Service Experiences by designing and implementing AI-native technology transformation. As expert partners with ServiceNow, Creatio, Freshworks, and Zendesk, we provide integrated solutions across Omnichannel CX, CRM, ITSM, and Process automation. Our proprietary PATH TO OUTCOME™ methodology moves organizations from fragmented technology investments to measurable customer outcomes. From interactions to outcomes — that is the journey we deliver, every engagement, every client.

UnshacklAI

Go AI-Native CRM. Liberate Your Budget.

unshacklai.com

THE FOUR CHECKS, ONE MORE TIME

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