

# Creatio Recognized in The Financial Services CRM Landscape Report by an Independent Research Firm

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/EINPresswire.com/ -- [Creatio](#), a global vendor of one platform to automate workflows and CRM with no-code and a maximum degree of freedom, today announced its inclusion in The Financial Services CRM Landscape, Q2

2023 by Forrester Research. The report covers CRM vendors with retail banking, insurance, and investment/wealth management solutions. It is intended to help business and tech executives in the financial services industry to better understand the value they can expect from a CRM and explore providers in the market.

Within the report which is an overview of 25 vendors, Creatio has been included as one of six that self-reported that their customers use most or all of the use cases that are most essential for financial services.

According to Forrester, "Growing revenue, reducing costs, and improving customer experience are three of the top five business objectives that financial services business and technology professionals have identified as a high priority for the next 12 months, according to Forrester's Priorities Survey, 2023. CRMs purpose-fit for retail banks, insurers, and investment/wealth management firms can help with these priorities and drive business value by helping firms engage, attract, acquire, and retain customers. These solutions also decrease risk, ensure compliance, and deliver ongoing value, which makes CRM a significant part of financial services firms' technology strategies."

Creatio's offering, [Financial Services Creatio](#), is one platform to automate financial services workflows and CRM with no-code and a maximum degree of freedom. It allows financial services organizations to easily manage the end-to-end customer journey and streamline front and



middle-office workflows.

The full report is available at [the Forrester website](#) to active subscribers or for purchase.

## About Creatio

Creatio is a global vendor of one platform to automate workflows and CRM with no-code and a maximum degree of freedom. Millions of workflows are launched on our platform daily in 100 countries by thousands of clients. Genuine care for our clients and partners is a defining part of Creatio's DNA.

For more information, please visit [www.creatio.com](http://www.creatio.com).

Vera Mayuk

Creatio

+1 617-765-7997

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