

# Creatio Recognized as a Strong Performer in CRM Software For Financial Services Report, Q1 2025

*The report evaluates the 7 top CRM providers for financial services with Creatio recognized for its vision to unify AI, no-code, and vertical CRM*

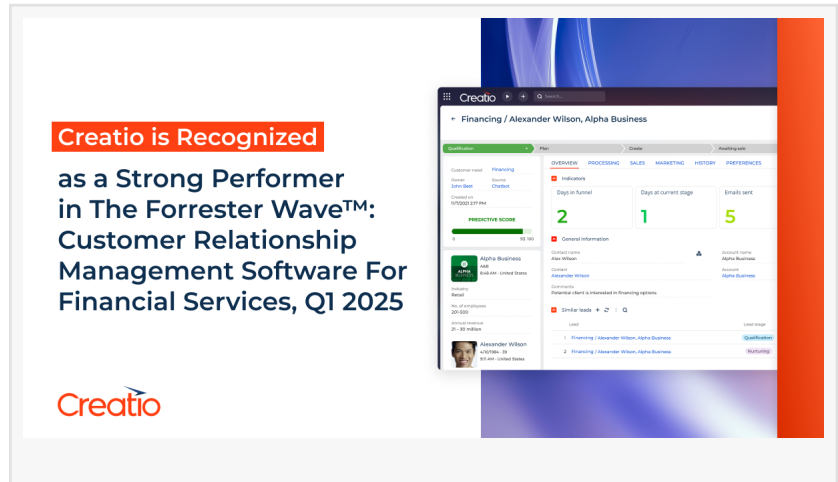
BOSTON, MA, UNITED STATES, April 14, 2025 /EINPresswire.com/ -- [Creatio](https://www.creatio.com), a global vendor of an AI-native platform to automate workflows and CRM with no-code, today announced it has been named a Strong Performer in The Forrester Wave™: Customer

Relationship Management Software For Financial Services, Q1 2025. In their 38-criterion evaluation of financial services solutions, the independent research firm identified 7 of the most significant vendors and evaluated their strategy, current offering and customer feedback.

Creatio believes its inclusion in the Forrester Wave™ report highlights its dedication to delivering tailored solutions that address the unique needs of the financial services industry. With its leading CRM suite, no-code platform, and pre-built Financial Services workflows, Creatio enables banks, insurance providers, and financial institutions to accelerate digital transformation, streamline processes, and enhance customer experiences with unparalleled agility and efficiency. For Creatio, this recognition is a testament to Creatio's mission to upend enterprise automation and help businesses achieve operational excellence through AI and no-code technology.

According to the Forrester Wave evaluation, "Creatio's vision is to transform financial services CRM automation by unifying AI, no code, and vertical CRM tools into a single composable solution that simplifies adoption and scales rapidly. Its roadmap focuses on delivering AI-native financial services CRM by offering more AI agents that automate tasks, decision-making, and optimization and by prebuilding AI led workflows for banking, insurance, and investment management that predict actions, detect inefficiencies, and optimize resources."

The report also states, "Customers like Creatio's out-of-the-box financial services capabilities that



they can easily build upon. They praise a UI that flattens learning curves, Creatio's Genuine Care support, and value for money."

This recognition in the Financial Services CRM report also builds on Creatio's continued momentum as a leader in no-code. In The Forrester Wave™: Low-Code Platforms For Citizen Developers, Q1 2024, Creatio was named the only Leader, reinforcing, in Creatio's opinion, its position at the forefront of no-code innovation. This recognition as a leader empowers financial institutions to easily tailor their CRM and workflows and to own their innovation roadmap with minimal IT involvement.

In the past year, Creatio intensified its presence in the financial services industry with 59% year-over-year revenue growth in the financial services sector, reinforcing its position as a trusted partner for leading banks, credit unions, and insurance providers. This growth also reflects the increasing demand for agile, AI-powered solutions that allow financial institutions to eliminate operational bottlenecks, ensure compliance, and enhance customer experience – without heaving IT dependency. Some notable clients include PeoplesBank, Minnwest Bank, Banco Internacional, Credins Bank, Raiffeisen Bank, OTP Bank, and many more.

The full report is available on the Forrester website to active subscribers or for purchase.

Explore [CRM Creatio](#) for Financial Services today and request a live demo.

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About Creatio

Creatio is a global vendor of a no-code platform to automate workflows and CRM with 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).

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