



Creatio Premier Partner Solutions Metrix Expands Accreditation from Credit Unions to Banks across North America

Leveraging expertise from 400+ financial services projects to help more institutions streamline operations and enhance customer experiences with AI

BOSTON, MA, UNITED STATES, July 21, 2025 /EINPresswire.com/ -- [Creatio](#), a global vendor of an AI-native platform to automate workflows and CRM with no-code, is deepening its strategic partnership with [Solutions Metrix](#), a Creatio Premier Partner and CRM advisory and implementation firm, with a strong track record of success in the credit union sector. Through a strategic expansion into banking, Solutions Metrix is helping financial institutions move faster by combining AI-powered CRM with intelligent agents to streamline operations, elevate customer experiences, and support teams in real time.

As the financial services industry faces growing pressure to modernize digitally, this partnership offers a proven path for organizations to accelerate change without compromising quality, compliance, or customer trust. Solutions Metrix brings a proven foundation of process expertise and customer-centric strategy to CRM implementations. Complemented by Creatio's powerful no-code and AI capabilities, the partnership delivers results that go beyond technology to improve how financial institutions operate and engage.

Based in Montreal, Solutions Metrix has delivered 400+ CRM transformation projects for financial institutions like Service 1st Federal Credit Union and Ukrainian Credit Union – standing out as one of the most seasoned and results-driven firms in the industry. Their approach focuses on improving both customer and employee journeys, enabling institutions to unify data, simplify processes, and launch faster across channels.

According to Karen Wood, Chief Experience Officer, Service 1st Federal Credit Union, "If asked what value Solutions Metrix brought to Service 1st, I would describe it as truly transformative. They went beyond simply providing a product or service; they became an integral part of our team. With their expertise, guidance, and genuine care, they helped us navigate the project smoothly and ensured its success. Their approach was not only professional but also empathetic, making them a trusted partner throughout the entire process."

Kirsten Sonius, Chief Experience Officer at Ukrainian Credit Union, echoed this sentiment: "Our credit union continues to be on an exciting journey of modernizing our digital platforms

including customer relationship management tools, and Ukrainian Credit Union is pleased to have selected to work with Solutions Metrix to guide us on the implementation plan. Through their expertise and team approach, we will be delivering the first phase within a few months - faster than we had originally planned."

"This partnership is not just about expanding into a new vertical. It's about helping banks transform the way they connect with customers and deliver services," said Sébastien Forget, CEO of Solutions Metrix. "Our success with credit unions has shown the power of combining strategic insight with flexible technology. Now, we're bringing that formula to banks looking for a smarter way to evolve."

"By strengthening our collaboration with Creatio, we can now offer banks and credit unions an accelerated route to results. Faster go-lives, higher adoption, and measurable business outcomes," added Harshjot Nijher, EVP at Solutions Metrix. "That's what the industry needs, and that's what we're thoughtfully delivering."

Solutions Metrix has already begun working with banking clients and is gearing up to support over 100 financial institutions in the coming years. Its experience with member-focused credit unions brings valuable insight into architecting systems that are both efficient as well as deeply aligned with customer needs.

"Our expanded partnership reflects a clear demand in the market. Banks and credit unions want purpose-built solutions that are flexible, fast, and trusted. Solutions Metrix has demonstrated that it can deliver this with precision and care, and we are excited to grow this momentum together," said Alex Donchuk, Senior Vice President, Global Channels at Creatio.

About Creatio

Creatio is a global vendor of an AI-native platform for workflow automation 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.

About Solutions Metrix

Solutions Metrix is a professional services company delivering digital transformation and change management with a sole focus on CRM. With over 15 years of experience, their CRM solutions for financial institutions, have helped deliver personalized member and customer experience, streamline operations and increase employee satisfaction. From advising on the latest industry best practices and peer benchmarking to building custom roadmaps and executing implementation, the Solutions Metrix team knows that real transformation goes far beyond

technology - it hinges on people. That's why user adoption is at the heart of every project. It starts with uncovering each client's unique pain points and delivering solutions tailored to fit.

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