

Creatio Launches Financial Services 'Twin' Release to Help Banks and Credit Unions Elevate Customer Engagement with AI

The release introduces a set of enhanced, ready-to-use banking workflows, new AI agents designed to boost performance, and advanced no-code configuration tools

BOSTON, MA, UNITED STATES, July 24, 2025 /EINPresswire.com/ -- [Creatio](https://www.creatio.com), a global vendor of an AI-native platform to automate CRM and workflows with no-code, today announced the launch of its [Financial Services "Twin" Release](#),

a product update that introduces new industry-specific AI-driven capabilities for banks and credit unions. The release was unveiled during Creatio's first executive event dedicated to financial services and represents a strategic expansion of the company's vertical offering.



The Financial Services "Twin" release introduces a new generation of industry-specific capabilities powered entirely by AI and no-code. The release focuses on three key areas: enhanced ready-to-use workflows tailored for banking, embedded AI agents for frontline and back-office tasks, and advanced no-code tools for customization and automation. Together, these innovations help financial institutions accelerate transformation while preserving human connection in every interaction.

"The financial services market is more competitive than ever, and institutions need to find new ways to stand out. With this release, we're providing banks and credit unions with AI-driven capabilities that help them achieve more with less and stay ahead of the competition," said Andie Dovgan, Chief Growth Officer at Creatio.

Building on that vision, the release introduces a comprehensive set of capabilities across four financial services workflow domains:

Customer Lifecycle Management

AI-enabled workflows in this area help banks and credit unions personalize engagement from the first touchpoint through onboarding and long-term support. Users can automate and launch targeted campaigns, track life events, and deliver timely offers and alerts. With the help of Agents, financial institutions accelerate content generation, automatically enrich customer profiles with third-party data, and automate routing of service requests based on context and customer profile.

Product Fulfillment

Amplified AI-guided workflows simplify deposit account setup, loan origination, and credit card upgrades. Institutions can configure end-to-end processes for personal, home, and vehicle lending. Front-line staff are supported by built-in AI Agents that recommend talking points and guide next-best actions, improving both speed and consistency in customer-facing interactions.

Operations and Internal Service Execution

Creatio now provides enhanced workflows for managing payments, fund transfers, internal requests, and commercial sales activities. Teams can use AI to help accelerate planning and tracking pipeline goals, resolve service tickets, and generate internal documentation using built-in Agents, all while working in a unified environment that minimizes handoffs and delays.

Compliance and Risk Management

Institutions can now configure no-code workflows to support evolving KYC, AML, and fraud detection requirements. The platform allows users to classify and triage compliance cases, receive alerts, and follow guided resolution steps based on institutional policy. These AI-powered no-code tools help improve visibility, accountability, and audit readiness across the organization.

These updated workflows are available through the familiar Creatio Freedom UI and a new full-screen conversational workspace. This new experience allows bank and credit union staff to use natural language with Creatio, creating a more intuitive and immersive way to access all information. Users can hold multiple conversations with Agents at once, offering a more fluid and natural way to stay productive. The workspace can also be embedded in familiar productivity tools like Outlook and Teams, allowing employees to work within the systems they already use while still having full access to Creatio's full capabilities.

All capabilities in the "Twin" Release can be tailored through Creatio's no-code platform. Teams can configure, adapt, and scale workflows without technical expertise. With composable components and a unified data model, bank and credit union institutions can also quickly launch new services, respond to change, and stay flexible as needs evolve.

"You don't need to build everything from scratch to achieve meaningful transformation," said

Burley Kawasaki, Global VP of Product Marketing and Strategy at Creatio. "With this release, we're giving banks and credit unions a foundation they can shape and extend to fit their unique needs without writing code or waiting on external development."

The event underscores Creatio's growing impact in the banking and credit union sector, with global customers such as OTP Bank, Bank of East Asia, MetLife, ENT Credit Union, First National Bank of Pennsylvania, ESL Credit Union, First National Bank and Trust, and others. This release reflects the company's long-term commitment to supporting financial services organizations through practical, scalable innovation. Creatio continues to expand its presence in the industry by delivering technology that empowers people to lead change from within.

The Financial Services Twin Release is available now to all Creatio customers and partners.

About Creatio

Creatio is a global vendor of an AI-native platform to automate CRM and workflows 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.

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