

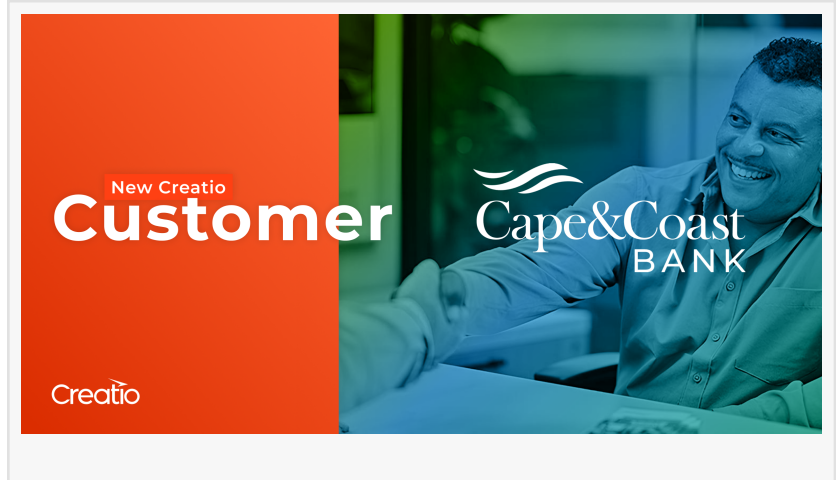
Cape & Coast Bank Taps Creatio's Agentic Platform to Advance Intelligent Automation and CRM Modernization

Massachusetts-based community bank modernizes operations with AI-native, no-code workflows to unify customer engagement and accelerate efficiency

BOSTON, MA, UNITED STATES, October 29, 2025 /EINPresswire.com/ -- [Creatio](https://www.creatio.com),

a global vendor of an agentic CRM & workflow platform with No-Code and AI at its core, announced that Cape & Coast Bank is implementing the platform to strengthen customer

relationship management and modernize operations organization-wide. By implementing the new platform, the bank expects to streamline key processes, unify customer data, and advance its digital capabilities with AI-driven innovation. □



Cape & Coast Bank is a Massachusetts-based community institution serving customers across the region. As a relationship-driven community bank, Cape & Coast has operated with technology that provided limited visibility across teams and required time-consuming manual processes, creating opportunities to improve collaboration and efficiency. □

With Creatio, the bank will implement a single AI-native platform to unify customer data, automate key workflows, and enable bank-wide visibility. The rollout will equip sales, service, and marketing teams with a 360-degree view of relationships and create a strong foundation for future AI-driven capabilities.

As artificial intelligence becomes a cornerstone of its strategy, Creatio's AI-native capabilities position Cape & Coast Bank to expand these efficiencies even further. Role-specific AI agents will act as digital partners for employees, eliminating repetitive tasks, delivering insights, and enabling staff to concentrate on higher-value customer and strategic initiatives.

"Cape & Coast Bank is focused on combining the power of technology with the personal relationships that define community banking," said Kenny Tingle, First VP, Business Intelligence

Manager, Cape & Coast Bank. “We plan to leverage generative and agentic AI to build on these gains — streamlining operations, amplifying decision-making, and enabling our people to focus their skills on customer relationships and strategic growth.”

Cape & Coast Bank selected Creatio after evaluating other platforms, citing its AI-native foundation, customer-centric design, and ability to support both immediate operational efficiency and long-term transformation. Supported by Technology Advisors as the implementation partner, the bank is on track to go live in the late fall of 2025.

“The CRM market today is crowded with vendors focused on profit over partnership,” added Tingle. “Creatio stood out for balancing innovation with customer focus, and for its ability to evolve with us as our strategy advances.”

Cape & Coast Bank’s initiative underscores how regional financial institutions can leverage agentic AI and no-code technology to achieve rapid, measurable results while preparing for long-term transformation. By combining workflow automation with role-specific AI agents, the bank is creating a model for how AI can expand human potential — reducing routine effort, accelerating decision-making, and strengthening customer relationships — all while laying a durable digital foundation for future growth.

About Cape & Coast Bank

Cape & Coast Bank is a Massachusetts-based community bank dedicated to fostering long-term relationships and supporting local communities with personalized financial services. With a focus on trust, innovation, and customer care, the bank continues to evolve to meet the needs of individuals and businesses across the region.

About Technology Advisors

Technology Advisors is a global business and technology consulting company specializing in CRM and no-code solutions. The firm helps organizations modernize operations, drive adoption, and maximize ROI from their digital transformation initiatives.

About Creatio

Creatio is a global vendor of an agentic CRM & workflow platform with No-Code and AI at its core. We help organizations automate customer and operational workflows, achieving the fastest time-to-value and the highest ROI on the market. Millions of workflows run on Creatio daily, supporting thousands of clients in 100 countries. Genuine care for our clients and partners is at the core of our DNA.

For more information, please visit www.creatio.com.

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