

# State Bank of Southern Utah Selects Creatio's Agentic Platform to Deliver Personal, Growth-Oriented Banking

*Utah-based community bank adopts AI-native, no-code CRM to enhance customer journeys, referral management, and 360° relationship insights*

BOSTON, MA, UNITED STATES, November 5, 2025 /EINPresswire.com/ -- [Creatio](#), a global vendor of an agentic CRM and workflow platform with no-code and AI at its core, today announced that State Bank of Southern Utah (SBSU) is adopting its

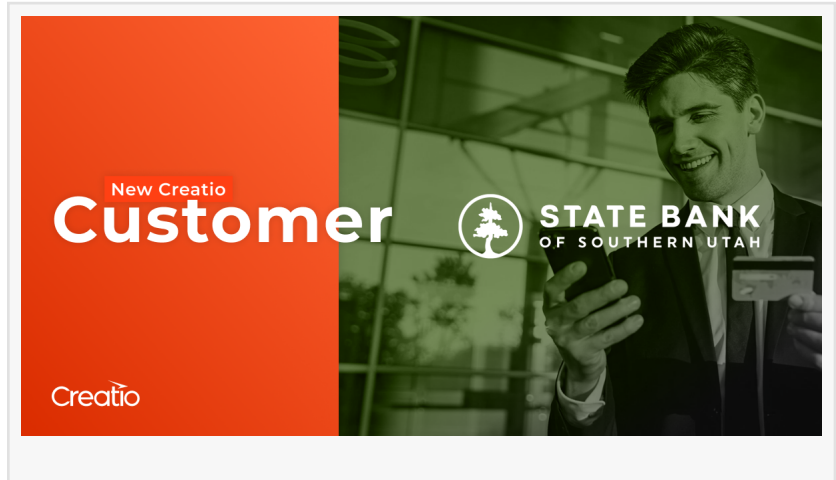
platform to modernize customer engagement. The bank is introducing holistic CRM, aiming to unify data, enhance customer journeys, and strengthen its community-driven growth strategy.

Since 1957, SBSU has been committed to delivering personal, local banking rooted in trust and community values. With 17 locations serving individuals, families, and businesses across Southern Utah, the bank continues to thrive by blending tradition with innovation.

Now, the organization is entering a new chapter with its first-ever agentic CRM, adding digital tools to deepen relationships and support referrals while staying true to the neighborly service and community values that have defined the bank for generations.

Working with Technology Advisors as its implementation partner, SBSU will leverage Creatio to build a complete 360° view of customers by consolidating data across systems, supporting tailored engagement through customer journey management, and strengthening community-driven growth. The platform will also integrate seamlessly with core banking systems to unify operations.

"Introducing a CRM was a carefully considered decision—we wanted to grow without losing the personal touch that makes us who we are," said David Duncan, Chief Operations Officer at State Bank of Southern Utah. "Creatio's agentic platform will help us better understand the needs of our community, deepen relationships, and adapt quickly as those needs evolve."



SBSU evaluated other legacy platforms but chose Creatio for its ease of use, rapid implementation, and agentic capabilities that empower autonomous workflows and intelligent decision-making, delivering more adaptability and speed than traditional CRM providers, with no-code tools adding further flexibility.

“With more and more financial institutions choosing agentic platforms, the industry is shifting toward agentic platforms to supercharged growth. Organizations like State Bank of Southern Utah are showing how banks can embrace technology that strengthens personal relationships while supporting growth and efficiency,” said Andy Zambito, Chief Sales Officer at Creatio.

By embracing Creatio, State Bank of Southern Utah demonstrates how community banks can modernize responsibly—introducing advanced digital tools while preserving the trust and local focus that define their identity. This balance of innovation and tradition reflects a growing movement across the financial services sector to adopt agentic platforms that empower growth without losing the human touch.

#### About State Bank of Southern Utah

At State Bank of Southern Utah, we believe banking should be personal, local, and built on trust. Since 1957, we’ve been committed to helping individuals, families, and businesses thrive across Southern Utah. With decisions made locally by people who care about our communities, SBSU provides relationship-driven financial solutions designed for the future. Learn more at [www.sbsu.com](http://www.sbsu.com).

#### About Technology Advisors

Technology Advisors, Inc. is a Chicago-based consulting and technology services company specializing in CRM, business process automation, and digital transformation. With decades of expertise, TAI helps financial institutions and other organizations implement and scale technology to achieve long-term success.

#### 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 over 100 countries. Genuine care for our clients and partners is at the heart of our DNA.

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