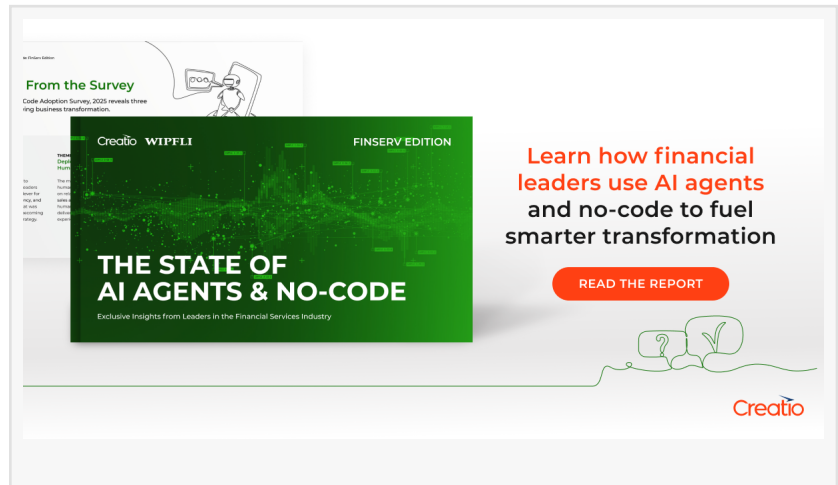


# Creatio and Wipfli Publish Financial Services Edition of The State of AI Agents & No-Code

*Banks and credit unions prioritize trust, governance, and customer experience as they embrace AI agents and no-code innovation*

BOSTON, MA, UNITED STATES,  
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EINPresswire.com/ -- [Creatio](#), a global vendor of an agentic CRM & workflow platform with no-code and AI at its core, today launched [The State of AI Agents & No-Code: Financial Services Edition](#), in partnership with Wipfli, a leading advisory and consulting firm. The research captures exclusive insights from more than 100 business and technology leaders across the financial services sector and explores how institutions are progressing with AI and no-code technologies while safeguarding trust, security, and regulatory discipline.



The findings reveal a sector that sees AI as a strategic advantage yet approaches adoption with discipline and long-term vision. Four out of five leaders confirm AI is now tied directly to near-term business priorities, and many organizations have begun elevating AI discussions to the boardroom. Rather than moving quickly for the sake of pace, financial institutions are building a thoughtful foundation for AI-driven growth.

Customer-facing innovation is emerging as a clear priority. Banks and credit unions are deploying AI agents to enhance client engagement, strengthen personalization, and support frontline teams. Leaders overwhelmingly view AI as an opportunity to augment employees and unlock new career pathways, not replace human expertise.

No-code adoption continues to advance across the sector. Sixty percent of financial services organizations have already deployed no-code platforms in some capacity, and eighty-seven percent feel confident using these capabilities to build AI-enabled solutions over the next twelve to eighteen months. For a sector deeply focused on compliance and control, this reflects growing confidence in platforms that allow organizations to move faster without compromising governance.

At the same time, clear guardrails remain essential. Regulatory expectations, data protection standards, and system integration requirements continue to shape adoption strategies. As institutions look to scale, responsible deployment and strong oversight remain non-negotiable.

"AI is fundamentally reshaping financial services—not as a distant vision, but as a force that's redefining how we serve clients, manage risk, and drive growth", said Anna Kooi, Partner, Financial Services Practice Leader at Wipfli. "What stands out in this research is that true transformation isn't just about adopting new technology; it's about empowering people at every level of the organization. The institutions that will thrive are those that lead with strategy, invest in talent, and foster a culture of curiosity and responsible innovation. At Wipfli, we're proud to partner with Creatio to help financial institutions move beyond the hype, build real-world solutions, and unlock AI's potential as a foundation for lasting impact."

"Financial institutions are showing that innovation and trust can go hand in hand. AI in this sector is not about speed for the sake of speed. It is about scaling intelligence responsibly, maintaining control, and strengthening the customer relationship. We are seeing a new phase emerge, where AI agents and no-code platforms empower teams, elevate service experiences, and help banks and credit unions lead with confidence," said Chris Jackson, Industry Marketing and Strategy Lead, FinServ at Creatio.

The report reinforces that the future of AI in financial services will be built on partnership between people and intelligent systems, combining automation with human judgment and customer trust. The full Financial Services Edition of The State of AI Agents & No-Code report is now available.

[Read the report](#) to explore the findings in depth and learn what is driving AI adoption across the financial services sector.

#### About Wipfli LLP

Wipfli is a leading national advisory and accounting firm with nearly 100 years of serving ambitious middle-market organizations. We understand our clients' unique challenges and help them succeed on their terms through assurance, tax, advisory, outsourcing and technology services. With 3,000+ associates and global alliances, we combine national capabilities with local relationships.

Wipfli operates under an alternative practice structure: Wipfli LLP, a licensed CPA firm, provides attest services, while Wipfli Advisory LLC, a non-CPA firm, delivers business advisory and non-attest services.

Learn more at [wipfli.com](https://wipfli.com) or contact Alicia O'Connell at [alicia.oconnell@wipfli.com](mailto:alicia.oconnell@wipfli.com).

## 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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