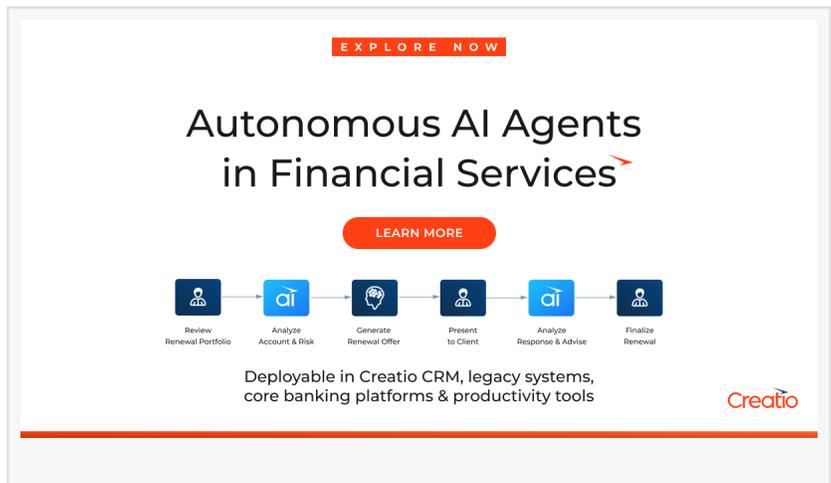


Creatio Introduces Autonomous AI Agents for Financial Services at Live Event

New autonomous agents move banking AI from assistance to execution across revenue growth and operations

BOSTON, MA, UNITED STATES, February 12, 2026 /EINPresswire.com/ -- [Creatio](#), a global vendor of an agentic CRM and workflow platform with no-code and AI at its core, today announced the introduction of its portfolio of pre-built autonomous AI agents for banking during its digital event, [Autonomous AI Agents in Financial Services](#). The announcement marks a shift from AI-assisted tools toward autonomous, agentic solutions designed to independently execute and orchestrate end-to-end banking workflows in production environments.



The graphic features a central title "Autonomous AI Agents in Financial Services" with a red "EXPLORE NOW" button above it and a red "LEARN MORE" button below it. A horizontal flowchart below the buttons shows six steps: "Review Renewal Portfolio" (person icon), "Analyze Account & Risk" (AI icon), "Generate Renewal Offer" (document icon), "Present to Client" (person icon), "Analyze Response & Advise" (AI icon), and "Finalize Renewal" (person icon). Below the flowchart, it states "Deployable in Creatio CRM, legacy systems, core banking platforms & productivity tools" and includes the Creatio logo in the bottom right corner.

The event featured live product demonstrations, executive commentary, and customer use cases illustrating how autonomous agents are being applied in real banking operations. Creatio showcased how these agents operate with built-in governance, auditability, and human oversight to meet the regulatory and operational demands of financial institutions.

“Banks are moving beyond experimentation and looking for AI that can reliably execute real work. Our autonomous banking agents are designed to operate end to end, with accountability and control, delivering measurable outcomes rather than incremental productivity gains,” said Burley Kawasaki, SVP of Industries at Creatio.

From AI Assistance to Autonomous Execution

Creatio’s autonomous banking agents are designed to run full end-to-end business processes, not simply recommend actions or support individual tasks. Unlike copilots or embedded AI features, these agents coordinate decisions, actions, and handoffs across systems and teams, while maintaining required human-in-the-loop controls.

Creatio is the only enterprise AI platform that combines a no-code agentic platform, advanced

agent orchestration, and pre-built vertically-focused autonomous AI agents in a single system. Banks can start with ready-to-use agents and extend them without engineering, reducing complexity and time to value. The agents can be deployed either independently or together as a system of agents on top of Creatio's no-code agentic platform, enabling banks to optimize total cost of ownership.

Faster Time to Measurable ROI: Production Deployments in 10–12 Weeks

Creatio's autonomous banking agents are designed to deliver measurable outcomes quickly, without requiring system-of-record upgrades or a major data consolidation program before value can be realized. Banks can deploy pre-built agents in as little as 10–12 weeks, orchestrating workflows across existing applications and data sources while keeping employees in familiar productivity tools like Microsoft Outlook, Microsoft Teams, and Zoom. This approach reduces disruption, accelerates adoption, and enables rapid ROI by automating high-volume, high-friction processes in real banking environments.

Creatio's autonomous banking agents address this need by combining:

- Pre-configured, real-world banking use cases, not generic AI tools
- Autonomous execution and end-to-end orchestration, not just recommendations
- Enterprise-grade governance, including auditability, observability, and human oversight
- Measurable ROI and faster time to value through pre-built agents
- Flexible deployment options, either standalone or platform-based
- Embedded operation within existing workflows and productivity tools

Together, these capabilities position Creatio's autonomous agents as a new execution layer in banking operations, proactively performing tasks end to end and reducing reliance on fragmented applications, AI assistants, and manual, human-driven interactions.

Pre-Built Autonomous Banking Agents

During the event, Creatio introduced a portfolio of banking-ready autonomous agents organized around two priority areas where banks see immediate ROI: revenue generation and operational excellence.

Revenue Generation Agents are designed to proactively grow and protect customer relationships by automating activities that are traditionally manual, reactive, or inconsistent. These agents address key stages of the customer lifecycle:

Referral Agent

Identifies referral opportunities based on customer engagement and satisfaction signals, initiates outreach and automatically routes qualified referrals.

Renewal Agent

Monitors upcoming renewals, assesses risk and opportunity, and triggers renewal workflows with automated follow-ups.

Retention Agent

Detects early churn risk using behavioral, service, and sentiment data, then launches targeted retention actions and escalations.

Operational Excellence Agents are focused on reducing cost, cycle time, and friction across high-volume banking operations. These agents address critical operational workflows across the banking lifecycle:

Customer Onboarding Agent

Orchestrates onboarding end to end, including document collection, validation, task coordination, and exception handling.

Loan Preparation Agent

Automates pre-origination workflows such as document intake, data extraction, completeness checks, and readiness assessment.

Loan Servicing Agent

Manages post-origination servicing requests, coordinating actions across systems with full visibility and auditability.

Creatio's autonomous banking agents change how banks apply AI in regulated environments by ensuring agents are configured and tuned to each bank's specific data, policies, and operating processes. Banks can adapt the pre-built workflows to reflect how work is actually performed, while governance dashboards provide continuous visibility into agent behavior, decisions, actions taken, and exception paths. This allows teams to monitor performance, validate compliance, and maintain human oversight, enabling banks to deploy autonomous agents in production with confidence and scale safely over time.

To learn more about Creatio's autonomous AI agents for banking or to watch the recording of the event, visit:

[Autonomous AI Agents in Financial Services | Digital Event | Creatio](#)

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. ☐☐☐

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

PR Creatio

Creatio

+1 617-765-7997

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