

Everwise Credit Union Unifies 27 Departments on Creatio and Cuts Process Times from Days to Minutes

Indiana's largest credit union deploys enterprise-wide agentic CRM, achieving a 40% reduction in process inefficiency

BOSTON, MA, UNITED STATES, July 16, 2026 /EINPresswire.com/ -- [Creatio](#), an AI CRM and workflow platform where people and AI agents work together, today announced that Everwise Credit Union has built a foundation for AI-powered member service, unifying multiple departments across the

organization on a single agentic banking CRM platform, deliberate sequencing the organization credits for the speed and durability of its results.



Serving over 300,000 members through a full-service branch network, Everwise offers products ranging from personal checking to commercial lending. Following a rebrand from Teachers Credit Union in 2023, the organization faced a fragmented technology stack that limited its ability to deliver consistent, relationship-driven member service.

To address this, Everwise launched a full-scale CRM consolidation initiative, selecting Creatio over Salesforce and Microsoft based on platform flexibility, no-code configurability, and the quality of the working relationship. The team validated requirements across all 27 departments before moving into implementation, enabling business users to configure workflows without developer dependency.

"It's the year 2026. Our members expect that we know them. They expect that we've built up a good relationship with them — and if they come to us with a problem, they expect we'll remember it."

— Jennifer Castaneda, Vice President, Banking Platforms, Everwise Credit Union

With Creatio's Member 360 live across retail and operations, any employee can now view a

member's full interaction history and request status in real time. Processes that previously took 10 days now complete in minutes, and the organization has achieved a 40% reduction in process inefficiency. The marketing team's migration onto the same platform is currently underway.

With a clean data foundation and standardized processes now in place, Everwise is advancing its AI roadmap using a crawl-walk-run approach. Near-term deployments include summarization agents to reduce manual data entry, predictive agents to surface next-best-product recommendations and referrals, and autonomous onboarding workflows for repeatable, low-risk processes. Compliance, data quality, and user adoption are prerequisite gates before any workflow goes autonomous.

"AI is only going to take what we have with our current processes. It was incredibly important to ensure we had a very strong foundation before we began our AI journey."

— Jennifer Castaneda, Vice President, Banking Platforms, Everwise Credit Union

Everwise's deployment reflects a broader shift in financial services, where unified, AI-enabled platforms are becoming essential infrastructure for institutions looking to connect member data, streamline operations, and scale personalized service across large, distributed organizations.

About Everwise Credit Union

Everwise Credit Union is Indiana's largest credit union, serving over 300,000 members through a full-service branch network. Formerly known as Teachers Credit Union, Everwise offers a comprehensive range of financial products and services, from personal checking and savings to commercial lending, with a commitment to delivering relationship-driven member experiences at scale.

About Creatio

Creatio is an AI CRM and workflow platform where people and AI agents work together — with no limits on users, agents, or scale. We help midsize and large organizations run customer workflows in the AI era. Headquartered in Boston, MA, with a global team and a large ecosystem of partners, Creatio serves thousands of customers in over 100 countries and automates tens of millions of workflows daily. Genuine care for our clients and partners is at the heart of our DNA.

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