



Sharonview Federal Credit Union Chooses Creatio to Deepen Community Roots and Modernize How It Serves Its Members

70-year-old community institution moves beyond siloed systems to deliver personalized, data-driven member experiences at scale

BOSTON, MA, UNITED STATES, July 20, 2026 /EINPresswire.com/ -- [Creatio](#), an AI CRM and workflow platform where people and AI agents work together — with no limits on users, agents, workflows, or scale, today announced that Sharonview Federal Credit Union has selected its platform to modernize how it serves members across the Carolinas, making it easier and faster for every member to achieve the financial freedom they are working toward.

Founded in 1955 and celebrating its 70th anniversary, Sharonview Federal Credit Union is a community-focused financial institution with branches spanning North and South Carolina — from coastal communities like Wilmington to cities like Charlotte. Rooted in the credit union philosophy of people helping people, Sharonview is deeply committed to the financial wellness of its members and the broader communities it serves, with corporate initiatives focused on mental health awareness, hunger relief, and support for unhoused populations. To continue delivering on that mission as the organization grew and member expectations evolved, Sharonview set out to find a platform that could match the ambition of its mission and give its teams the tools to serve members with greater precision, consistency, and care.

Sharonview selected Creatio to connect departments and processes that had previously operated in silos and bring key workflows into a single, unified environment. With a 360-degree view of the member relationship now within reach, the credit union is positioned to better understand member needs, tailor communications to individual goals, and create the kind of coordinated, cross-departmental experience that a modern financial institution demands.

"When it came down to it, Creatio was second to none in what we were looking for," said Helen Griffith, Vice President of Marketing at Sharonview Federal Credit Union. "The integration across our departments, the flexibility, the ability to finally start meeting our members where they are — that is what this is about. We want to move forward in a meaningful way."

The initial implementation will focus on integrating Sharonview's existing systems, centralizing member data, and establishing a lead management flow from marketing through to the lending team. The sprint-based delivery approach has already generated significant excitement across

the teams involved, offering a faster, more iterative path to value than the organization had experienced with previous technology implementations.

For Sharonview's marketing team in particular, the opportunity is significant. With access to real-time member data, notes from across departments, and a clearer picture of member intent and life stage, the team will be able to move away from broad, assumption-based communications toward targeted, meaningful outreach — incorporating richer formats like embedded video and surveys that their current tools cannot support.

"What excites me most is that we will finally be able to speak to what our members actually want, rather than assuming that people in the same demographic are going through the same things," said Helen Griffith, Vice President of Marketing at Sharonview Federal Credit Union. "Every member comes to us from a different place in life, and Creatio will help us meet them there."

"Sharonview Federal Credit Union embodies what the credit union movement stands for — a genuine commitment to the people and communities they serve," said Andy Zambito, Global Chief Sales Officer at Creatio. "Their decision to invest in a modern, integrated platform reflects a clear-eyed understanding that to keep delivering on that commitment, they need the tools to know their members deeply and engage with them in a way that is timely, relevant, and personal. We are proud to support that mission."

This selection is part of a broader digital transformation underway at Sharonview, with the current implementation representing the first phase of what the organization envisions as a much wider deployment across the credit union. By building the right foundation now, Sharonview is positioning itself to adapt as technology evolves, meet the expectations of a new generation of members, and continue doing what it has done for 70 years — helping people achieve financial freedom.

About Sharonview Federal Credit Union

Sharonview Federal Credit Union is a member-owned financial institution founded in 1955 and headquartered in Charlotte, North Carolina. With branches spanning North and South Carolina, Sharonview serves members across coastal, rural, and urban communities with a full range of financial products and services — including savings and checking accounts, mortgages, home equity loans, personal loans, and financial wellness resources. Rooted in the credit union philosophy of people helping people, Sharonview is deeply committed to the financial wellbeing of its members and the communities it serves, with a particular focus on mental health awareness, hunger relief, and support for unhoused populations. Sharonview's mission is to help every member achieve financial freedom — meeting them where they are and supporting them at every stage of their financial journey.

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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