

Canadian Ukrainian Credit Union Builds an Agentic CRM Foundation to Fuel Membership Growth

Ontario-based credit union unifies member data across branch, contact center, commercial and wealth teams, generating 400 leads in a single quarter with Creatio

BOSTON, MA, UNITED STATES, August 28, 2026 /EINPresswire.com/ -- [Creatio](#), an AI CRM and workflow platform where people and AI agents work together—with no limits on users, agents, or scale—today announced that Ukrainian Credit Union Limited (UCU) has successfully deployed its platform to unify member data and centralize its sales and service pipeline across the organization.



Founded in Toronto in 1944, UCU has grown into the largest Ukrainian credit union in Canada, with more than \$1 billion in assets and 16 branches and service points across Ontario. As the organization prepared for its next phase of growth, it needed a unified view of its pipeline and member relationships across the business.

To close that gap, UCU implemented Creatio's banking CRM platform, creating a single, centralized view of every member while giving business teams the flexibility to continuously adapt and extend the platform through its agentic capabilities.

Since go-live, UCU has generated full visibility into its own pipeline for the first time collecting 400 leads across all channels in a single quarter alone. Additionally, at the center of the rollout is Member 360, giving every team (branch, contact center, commercial, and wealth) the same real-time view of the member, including full interaction history and active offers.

Structured, consistent data now underpins UCU's expansion into AI. The credit union has already deployed a knowledge-based Q&A tool for member-facing staff and is planning next-best-offer recommendations, lead scoring, and lifecycle-trigger capabilities for later in 2026.

"With Creatio, we know exactly where our data lives and how it's being used, that's not something we take lightly at a credit union. That clean foundation is what lets us move forward with AI confidently, because we're not guessing. We know what's underneath it is safe and sound." — Kirsten Sonius, Chief Experience Officer, Ukrainian Credit Union

UCU's experience reflects a broader shift in financial services, where credit unions and banks alike are moving toward agentic platforms that pair clean, governed data with AI built for scale rather than sprawl.

As institutions expand their use of AI in member-facing and back-office processes, the ones seeing the clearest returns are those — like UCU — that treat data governance and structure as a prerequisite to automation, not an afterthought. That discipline is shaping how the next generation of AI use cases gets built across the industry, particularly in banking, where trust and accuracy are non-negotiable.

"Ukrainian Credit Union represents exactly where financial services is heading — treating clean, governed data as the foundation for AI. What UCU has done in just a few months, from unifying member data across every division to generating real, measurable pipeline growth, shows what's possible when a credit union commits to getting the fundamentals right first. We're excited to keep building alongside their team as they expand into the next phase of agentic AI." - Nick Owens, Global VP, Customer Success at Creatio

TO FIND OUT MORE ABOUT THIS TRANSFORMATION, [FOLLOW THIS LINK](#).

About Ukrainian Credit Union

Ukrainian Credit Union Limited (UCU) is a member-owned financial cooperative founded in 1944 in Toronto. Now the largest Ukrainian credit union in Canada, UCU serves members across Ontario through 16 branches and service points, with more than \$1 billion in assets. UCU offers a full range of personal and commercial banking, lending, mortgage, wealth management, and investment services, while maintaining a strong connection to Ukrainian Canadian culture and community.

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.

Creatio

+1 617-765-7997

[email us here](#)

Visit us on social media:

[LinkedIn](#)

[Facebook](#)

[YouTube](#)

[X](#)

This press release can be viewed online at: <https://www.einpresswire.com/article/937814072>

EIN Presswire's priority is source transparency. We do not allow opaque clients, and our editors try to be careful about weeding out false and misleading content. As a user, if you see something we have missed, please do bring it to our attention. Your help is welcome. EIN Presswire, Everyone's Internet News Presswire™, tries to define some of the boundaries that are reasonable in today's world. Please see our Editorial Guidelines for more information.

© 1995-2026 Newsmatics Inc. All Right Reserved.