Securityplus FCU Embraces Agentic CRM to Deliver More Connected Member Experiences

Baltimore-based credit union connects member data and AI to deliver more intelligent, personalized service



BOSTON, MA, UNITED STATES, September 3, 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 Securityplus Federal Credit Union has selected Creatio to embed agentic, no-code technology across the organization, unifying disparate systems into a single, connected view of each member to better understand and meet their financial needs.

Securityplus Federal Credit Union is a member-owned financial cooperative headquartered in Baltimore, offering a range of financial products and services centered on personalized service and seamless experiences. This member-first approach has made the consistency and quality of every interaction a strategic priority, prompting Securityplus to seek a technology partner that could bring that vision to life across the organization.

Like many financial institutions, Securityplus had accumulated a fragmented technology environment. Communications and service requests moved across multiple channels and departments, making ownership and follow-up difficult to track. Employees often had to navigate several systems to piece together a member's history, from previous interactions and products to service requests. The result was an incomplete view of the member relationship and added complexity for employees trying to deliver consistent service.

To address its immediate operational needs, Securityplus FCU set out to implement a banking CRM, conducting an in-depth evaluation of multiple providers. Creatio stood out for its combination of no-code technology, automation, integration capabilities, and agentic AI — meeting the credit union's needs today while providing room to evolve. Securityplus leadership saw particular potential in technology that can help employees navigate information, automate routine activities, and surface relevant insights, freeing up more time for what technology cannot

replace: building meaningful relationships with members.

Securityplus is deploying Creatio to give employees a unified 360-degree view of each member and put that insight to work in delivering more personalized, and proactive experiences. The platform will bring member service, relationship management, referrals, and lead management into a single environment, replacing fragmented tools and manual handoffs with consistent workflows for managing requests and identifying opportunities to deepen member relationships. For Securityplus, success will ultimately be measured not by CRM adoption alone, but by whether the technology helps create better experiences and stronger relationships with members.

“This is more than an investment in technology for Securityplus. It represents an investment in how we want to serve our members and empower our employees in the future. We are intentionally building an organization where technology makes human experience better, not less personal. The right technology should remove friction, provide insights, and give employees more time to have meaningful, impactful conversations. Our partnership with Creatio is an important part of creating that future.”

— Jeffrey Gehris, CCE, Executive Vice President, Chief Strategy and Experience Officer, Securityplus FCU

Securityplus sees tremendous potential for AI in financial services. The credit union is approaching it with the same purpose and responsibility it brings to everything member-facing — using AI to help employees summarize member interactions, surface relevant information, recommend next steps, automate routine activity, assist with service requests, and identify opportunities to better meet a member's financial needs. Over time, Securityplus expects AI to help the organization recognize patterns and anticipate member needs, moving from reactive to proactive.

“For us, the future is not about choosing between digital innovation and human connection. It is about bringing the two together to create a simpler, smarter, and more personalized member experience.”

— Jeffrey Gehris, CCE, Executive Vice President, Chief Strategy and Experience Officer, Securityplus FCU

Credit unions are built around member relationships rather than shareholder returns, making personal service central to how they compete with larger banks. Securityplus’s deployment reflects a broader shift among community-based financial institutions toward agentic, no-code technology that can modernize member engagement without losing that human connection.

About Securityplus Federal Credit Union

Securityplus Federal Credit Union is a member-owned financial cooperative headquartered in Baltimore, Maryland, serving approximately 36,000 members with roughly $580 million in assets. Securityplus offers a full range of financial products and services and is dedicated to empowering its members with financial security through personalized service, innovative solutions, and experiences that make it easy to do business with the credit union.

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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