



# Creatio Showcases Banking CRM and AI in Action at Bank.AI Digital Event

*The event explored agentic use cases for growth, customer service, operations, and governance*

BOSTON, MA, UNITED STATES, September 24, 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 hosted Bank.AI: Practical AI Use Cases for Banking, an online event demonstrating how Creatio enables financial institutions to put AI agents to work at the core of their banking operations.

For banks and credit unions, putting AI to work depends on connecting it to the customer data and processes that drive their business. The event showed how Creatio brings these elements together, giving leaders a practical starting point for applying AI within their institutions and addressing the fragmented workflows that limit its value.

Helping financial institutions grow, serve, and operate

The event brought Creatio's Bank.AI vision to life across three strategic pillars: growing customer and member relationships, improving service, and streamlining operations. Each segment paired a business overview with a demonstration of how people and AI agents can work together within banking workflows:

**Grow:** Creatio showed how AI can help banks and credit unions acquire customers and members, deepen relationships, and expand share of wallet. A commercial sales agent demonstration illustrated how AI can support a relationship manager in preparing for customer conversations, identifying opportunities, and moving a commercial relationship forward.

**Serve:** The service segment explored how human-led and AI-led workflows can improve response times, service consistency, and employee productivity. A banking customer service demonstration showed how this approach can help institutions deliver more connected, personalized experiences while involving employees when human judgment is needed.

**Operate:** The operations segment examined how AI agents can coordinate document-intensive, compliance-sensitive, and back-office processes. A collections agent demonstration provided a practical example of how AI can support employees in carrying out role-specific operational tasks.

Together, these examples highlighted the value of connecting AI with the customer relationships and processes already managed in CRM. With Creatio, an agent can move work forward across a connected process, helping institutions reduce fragmentation and deliver more consistent customer and member experiences.

### Supporting AI adoption with governance

The event also addressed a central consideration for banking leaders: how to expand AI adoption with appropriate oversight. The Creatio AI Trust Framework and Bank.AI governance model showed how institutions can build review and approval into workflows, with responsibilities determined by risk and institutional policy.

By pairing product demonstrations with banking expertise, Creatio gave participants a practical basis for assessing where AI can contribute in their own institutions. The program showed how a unified CRM and AI platform can support the transition to agentic banking, with people and agents working together toward business outcomes.

### Continue the journey with Bank.AI

Explore [www.bank.ai](https://www.bank.ai) to learn more about Creatio's vision and discover opportunities to advance agentic banking.

Banking and credit-union executives are also invited to continue the conversation at the Bank.AI Summit By Creatio on October 27, 2026, at the Four Seasons Hotel Chicago. The in-person event will bring leaders together to explore AI strategy, practical applications, and governance in financial services.

[Explore the agenda and register for the Bank.AI Summit.](#)

### 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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PR Creatio  
Creatio

+1 617-765-7997

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