

A portrait of John Arnold, a man with short brown hair and glasses, wearing a dark blue blazer over a light blue patterned shirt. He is smiling and looking directly at the camera. The background is a dark blue gradient with vertical light streaks.

KEYNOTE

The New Promise of CRM: Unlimited Adoption and Maximized Value

John Arnold

Head of Product Marketing & Strategic Advisory

CRM In a State of Rapid Innovation

01

AI Agents Everywhere

- Embedded in every CRM vendor's roadmap and release cycle
- Showing up across adjacent technologies such as ERP, data providers, content management
- Independent agent platforms claiming to connect to or replace your CRM

02

New Costs & Risks Everywhere

- New licenses and higher prices attached to every new AI capability
- A patchwork of AI pricing models such as per user, per message, per token, per outcome
- Uncertainty about how to deploy and govern AI reliably and cost-effectively

03

Unlimited Optimism

- Headlines about AI cutting significant costs or replacing entire parts of the workforce
- Pressure from boardrooms asking for AI plans and expecting immediate results
- Pushback from employees who are uncertain about their job security

Reimagine the way work gets done.

CRM gets used more, but CRM users log in less.

Every interaction generates better data.

And the customer gets exactly the experience they want.

Reimagine the **customer** experience



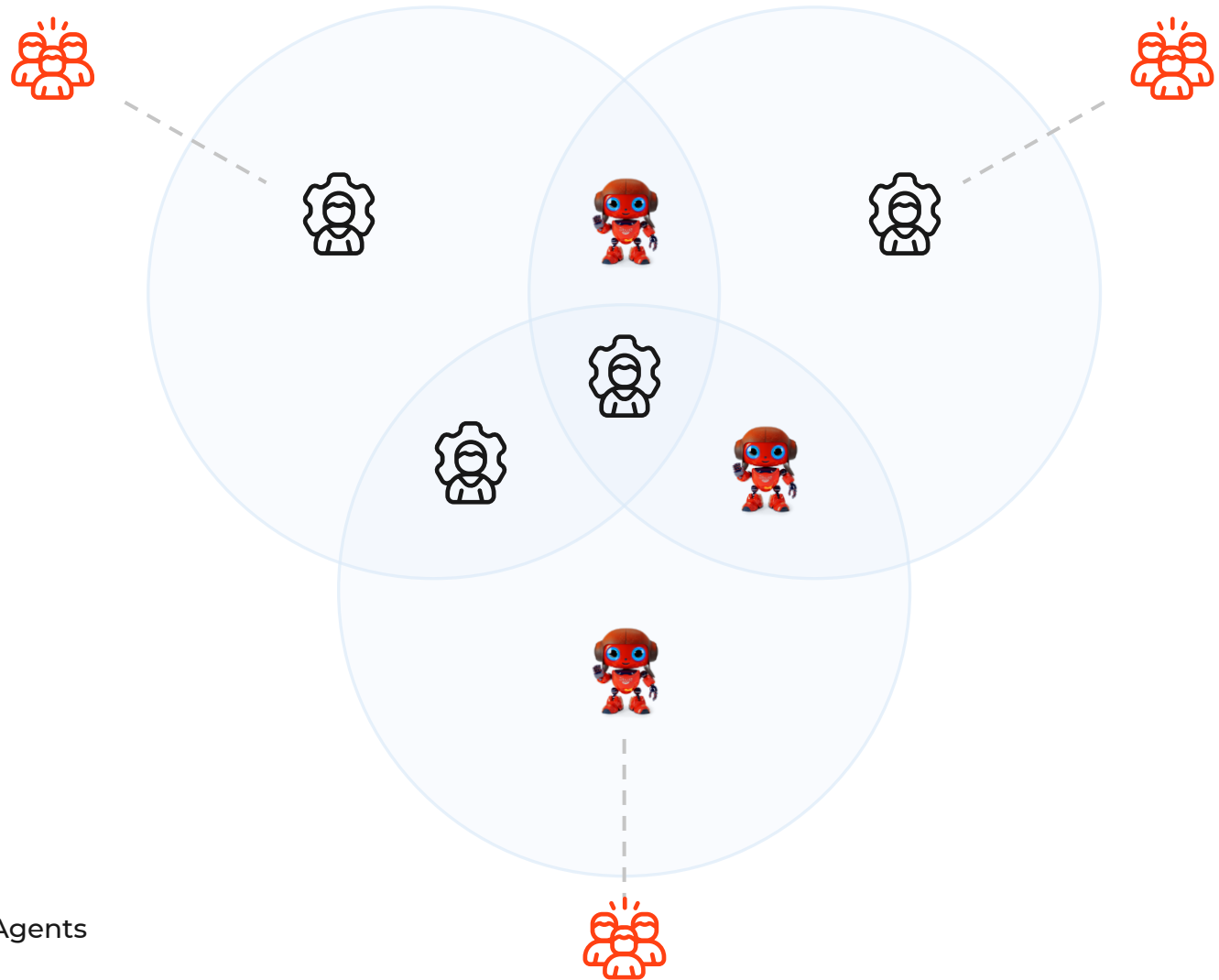
Customers



Employees



AI Agents



Which **path** should you take?

01

Evolve

Modernize incrementally. Layer agentic capabilities onto the core you already trust.

02

Transform

Strategically replace legacy CRM - in part or in whole - with new technology and new features.

03

Reinvent

Fundamentally rethink how people, AI, and CRM work together to create customer value, then transform.

Which **path** should you take?

01

Left Behind

Evolve

Modernize incrementally. Layer agentic capabilities onto the core you already trust.

02

Transform

Strategically replace legacy CRM - in part or in whole - with new technology and new features.

03

Reinvent

Fundamentally rethink how people, AI, and CRM work together to create customer value, then transform.

Choose the path **your customers** will love

01

Left Behind

Evolve

Modernize incrementally. Layer agentic capabilities onto the core you already trust.

02

Gridlock Alert

Transform

Strategically replace legacy CRM - in part or in whole - with new technology and new features.

03

Reinvent

Fundamentally rethink how people, AI, and CRM work together to create customer value, then transform.

This is the only viable option!

HOW WE GET THERE | THE INDUSTRY WILL EVOLVE

Reinvention is a carpool lane, not a lonely road

GET IN THE RIGHT VEHICLE

AI CRM ZONE

Creatio AI CRM is ready to take you where you want to go at your speed.

USE DESIGNATED DRIVERS

PARTNER ZONE

Partners and app developers are rapidly working to support reinvention.

LEARN TO DRIVE LIKE A PRO

SUPPORT ZONE

Creatio AI + partners + support community = unlimited reinvention together.



AI is driving the change. The whole industry is on the road. **Take the HOV lane.**

Here's what reinvention **unlocks** and how

Possibility Unlocked	How AI Helps	How the Community Helps
New Customer Experiences	AI agents serve channels you could never staff alone	Partners and customers share patterns you can reuse from day one
Faster Delivery	Coding agents and no-code accelerate every build	Marketplace apps and community templates plug in instantly
More Automation	Agents orchestrate full processes with people in the right places	Industry experts codify the playbooks that work
Smarter Agents	Built into every workflow, always working, always learning	App developers extend agents into every system that matters
Better Insights	Every interaction becomes structured signal for the business	Peers benchmark what good looks like across the industry
Continuous Reinvention	New capabilities arrive when you need them, not every release cycle	The community keeps learning, sharing, and shipping together

Which would **you choose?**

Feature	Limited CRM	Unlimited CRM
CRM Users	More users, more license fees	As many as the business needs
Workflows	More workflows, more license fees	As many as the business needs
Applications	More applications, more license fees	As many as the business needs
Integrations	More integrations, more license fees	As many as the business needs
AI Agents	More agents, more license fees	As many as the business needs
AI Actions	AI costs not tied to outcomes or RIO	AI actions tied to outcomes and ROI



**One
Platform:**
AI-Native Engine +
No-code Designers

1



Best-in-Class
**CRM and
Industry
Workflows**

2

Unlimited Enterprise



**People and
AI Agents**
working together

3



**Unlimited
Platform**

4



Genuine
Care

5



**One
Platform:**
AI-Native Engine +
No-code Designers



- 1. One AI-native engine:** Modern runtime with AI coding agents for 10x faster development
- 2. Advanced No-Code Designers:** Configure and extend Creatio applications and agents
- 3. Open and composable:** LLM-agnostic, seamlessly blends Creatio and 3rd-party AI components
- 4. Enterprise-grade scale and governance:** Controls, compliance, and observability for safe execution

Best-in-Class

CRM and Industry Workflows



1. **Market leading CRM** with robust set of capabilities highly recognized by Gartner and Forrester
2. **Intelligent CRM AI Agents** available in all workflows and daily productivity tools
3. **Best-in-class industry workflows and autonomous agents** accelerate delivery



People and AI Agents working together

- 1. AI, humans, and workflows as one:** Seamlessly orchestrated across the enterprise
- 2. Agent assistants:** Amplify every role with an instant productivity boost
- 3. Autonomous agents always working:** You sleep, they work, 24x7



Unlimited Platform

1. **Unlimited** users
2. **Unlimited** custom agents
3. **Unlimited** application
4. **Unlimited** workflows
5. **Unlimited** custom objects and API calls



Genuine

Care

5

1. **Deep relationships** with customers and partners
2. **Commitment** to measurable customer value
3. **Focus on long-term success** and continuous innovation

Three unlimited value streams that compound.

5x

Unlimited AI Agents

LOWEST COST PER AI OUTCOME

Every workflow gets an agent assistant. Add purpose-built autonomous agents without per-agent fees. Pay only for AI actions and their outcomes.

Unlimited Composability

FASTEST TIME TO VALUE

No-code and coding agent designers let you reshape the platform as fast as the business changes.

10x

Unlimited Usage

SCALABLE AND FUTURE PROOF

Unlimited users, workflows, applications, integrations, agents, and API calls. The platform grows with you, not against you.



A new era of performance indicators

Old Cost Model

- ✗ Cost per user
- ✗ Cost per license, per feature
- ✗ Cost dependent on adoption rates
- ✗ Cost per workflow throughput
- ✗ Cost of maintenance and overhead

New Cost Model

- ✓ Fewer licenses, unlimited capabilities
- ✓ One platform price, every capability included
- ✓ Value delivered the moment AI does the work
- ✓ Cost of usage tied to outcomes delivered
- ✓ Pay only when AI work drives value

Stop paying for capacity. Start paying for outcomes.

The path is yours to build

01

Choose to Reinvent, Then Transform Together

The old path is gone. Reinvention is the only option. You won't need to do it alone.

02

Leverage Unlimited CRM

One unlimited platform, with unlimited potential to connect your enterprise to your customers at scale.

03

Measure Unlimited Outcomes

Get people and agents working together in new ways, connect with customers, and measure the outcomes.

What's ahead: your CRM track sessions

NEXT UP

This Morning

Practical customer stories



PRACTICAL EXAMPLES

This Afternoon

More customer stories!



ROADMAP AND MORE

Tomorrow

Creatio roadmap, solution spotlights, agent use cases, expert panels, and more!





Thank you!