

The background of the image shows a conference stage with a speaker on the left and two other people on the right, all in front of a large audience. The scene is overlaid with a semi-transparent red filter. The text is centered over this scene.

AGENTIC LEADERSHIP

NO-CODE DAYS

F L O R I D A

Best-in-class

CRM

MOTTO OF THE CLOUD ERA:

**EVERY
WORKFLOW
GETS AN APP.**

How many apps does a 1,000-person company use, **per department?**

12 Finance & Accounting

15 HR

12 Supply Chain & Procurement

6 Legal, Risk & Compliance

10 Sales

15 Marketing

10 Service

15 R&D, IT

Not ready for Innovation and AI

01 Fragmented data

02 Integration debt

03 Spiraling cost

04 Error workflows

05 Employee fatigue

What does this bring
to the table?



The Architecture for the **Unlimited** Era.



01

Humans and Agents are working together



02

Workflows are naturally connected



03

Primary function of the software — provide intelligence



04

User adoption is not a factor



05

Platforms replace pointed solutions

Best-in-Class CRM:

**AI CRM and Workflow platform for
marketing, sales, service – with no limits
on AI agents, workflows and scale**

Best-in-Class Sales Automation Stack

Average number of sales products used by the best-in-class companies: 10+

Contact and Account Management

Sales Workflow Management

Mobile Sales

Field Sales Planning and Execution

Contacts & Accounts Data Sources

Lead Management

Sales Activity Management

Sales AI Agents

Configure Price Quote

Sales Compensation Management

Opportunity Management

Territory Management

Forecasts and Revenue Intelligence

Order Management

Sales Content Portals

Guided Selling

Sales Dashboards and Analytics

Sales Engagement and Cadences

Sales Deal Rooms

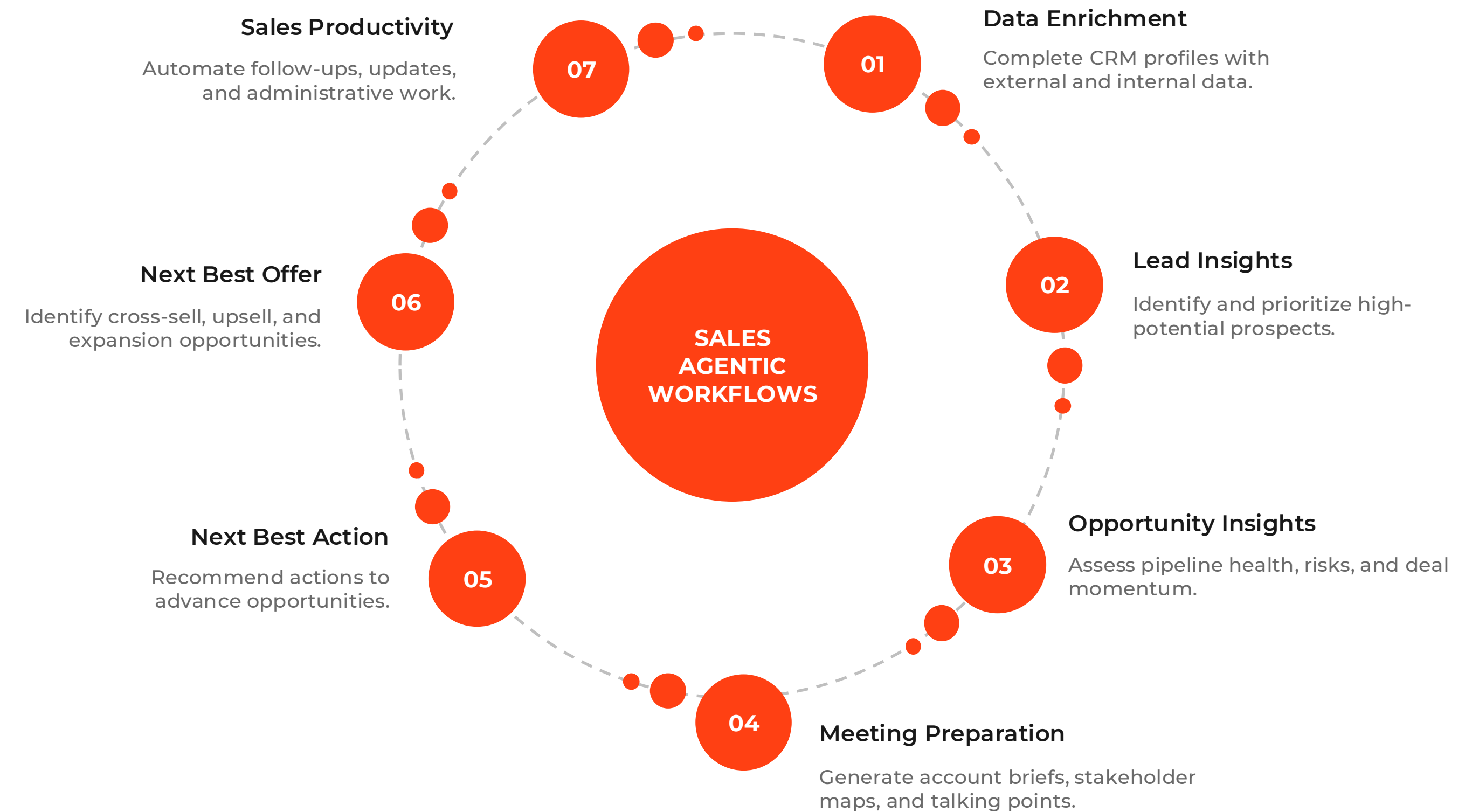
Sales Enablement Portals

Best-in-Class Sales Automation Stack

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Best-in-Class Sales Agentic Automation



Creatio Sales 10X

Forecast management

Submission history | Submit forecast | Additional details

PIPELINE REVIEW (WATERFALL) | PIPELINE MOVEMENT (SANKEY) | FORECAST DISTRIBUTION (PULSE)

How did my pipeline move across stages for opportunities closing 4/1/2026 till 6/30/2026 x during 4/7/2026 4:00 PM till 4/20/2026 3:59 PM x

Pipeline movement

Progression category: Non changes (Idle) | Reset

PIPELINE \$10,137,873

BEST CASE \$63,333

COMMIT \$1,170,844

UPGRADED \$9,818,325

NON CHANGES (IDLE) \$870,177

DOWNGRADED \$430,667

WON \$72,700

SLIPPED \$0

LOST \$180,182

Flow values: \$66,667 | 2, \$63,333 | 2, \$740,177 | 24

1	Solar panels / Accom, Romelia Brummitt	Accom	John Best	Engagement	Commit	Best Case	Downgraded
2	788 / Solar panels / Tanaka LLC, Whitley Goldstein	Tanaka LLC	Jason Robinson	Renewed	Commit	Best Case	Downgraded

Forecasts and Revenue Intelligence

Sequence task

LOCAL TIME 11:27 AM Mon, Apr 20 1412 Broadway, New... UTC-4

Priority High Time to pick-up 5hr 47min

Next best offers

- Smart lighting systems 96%: Motion-sensor smart light. Energy-saving lights that automatically turn on when motion is detected and switch off when no...
- Car charging stations: Portable EV charger. A compact and lightweight that can be carried for on charging. Plugs into stan...

AI insight

Account summary: This residential lead is evaluating smart lightning systems and likely focused on practical ROI, timing, and implementation. The lead shows potential fit and high engagement. BDR outreach should highlight simple use cases, qualify urgency, and move the conversation toward a concrete next step.

Personalization insights: Andrew is worth approaching with a short, role-relevant message rather than a broad pitch. Use email to test whether the main driver is timing before proposing a next step.

Company profile

Axiom Axiom 11:27 AM - United States

Industry: Construction

No. of employees: More than 1000

Account engagement status: Cold

Phone - primary: +1 404 532 3976

Alternate phone - primary: +1 782 223 697

Contact info

Full job title: ESG Manager

Preferred language: English (United States)

Preferred channel: Call

Health score: High

Email - primary: a.wayne@axiom.con

Business phone - primary: +1 (788) 247 101

Mobile phone - primary: +1 782 223 697

Timeline

Post a message... | Feed | Send

April 2026

Initial call to the customer | John Best | Today at 9:16 AM

Activity execution panel

Andrew Wayne 12/19/1971 - 54 11:27 AM - United States

Initial call to the customer Priority High

Snooze Complete Call

Description: Make the first call to introduce yourself and the company, briefly communicate the value proposition, and identify the correct contact person. Capture key insights such as interest level, pain points, and next steps. If no answer, leave a concise voicemail and log the attempt.

Result: Additional information required

- Canceled
- Completed
- Customer need defined
- Information received
- Left voicemail

Weather info | **Lead info** | **Map**

Sales Engagement and Cadences

Creatio
Search...
Active
Active
Submission history
Submit forecast

Forecast management

NEW BUSINESS FORECAST
ACCOUNT FORECAST

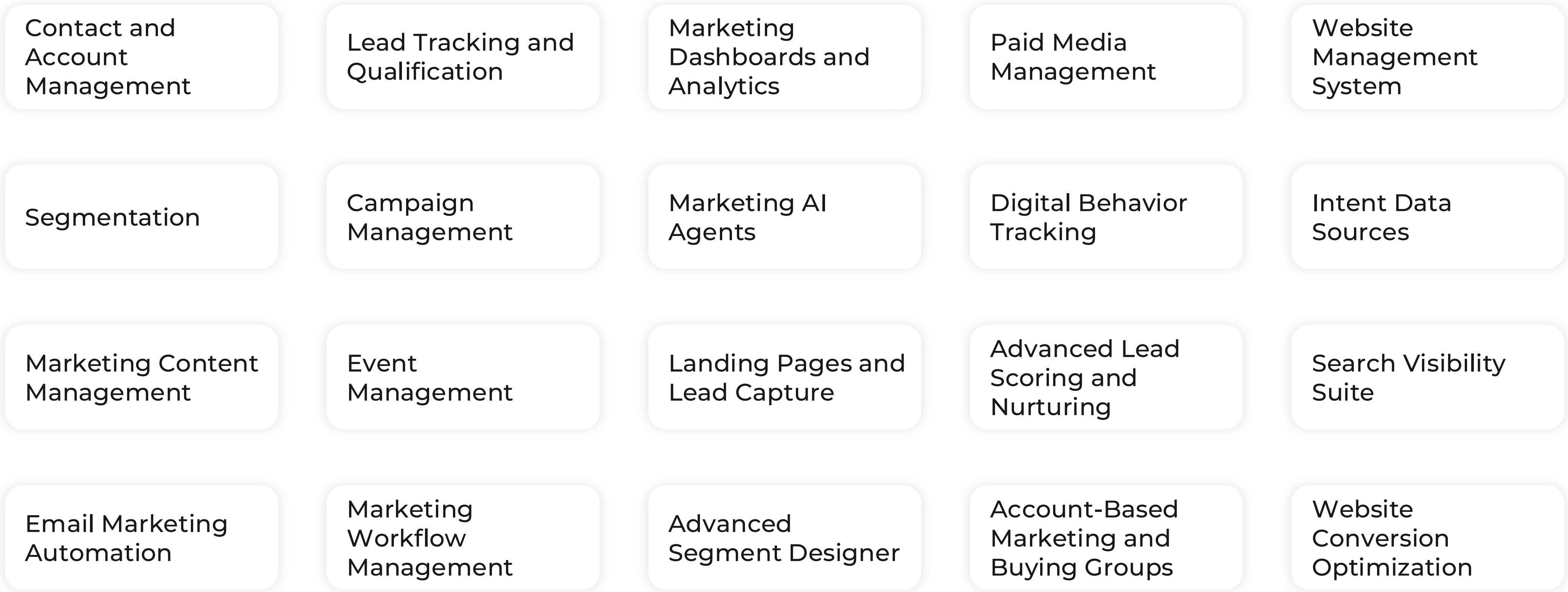
Americas
1st quarter of 2026
Manager

1ST QUARTER OF 2026

		Quota	Booked	Gap to go	Forecast call	AI Forecast call	Manager judgement
<ul style="list-style-type: none"> Willian Derrico Americas ✖ 		\$17,150,000 ↕	\$15,062,451	\$2,087,549	\$8,702,685 ↑	\$2,942,300 ↕	\$146,112,789
<ul style="list-style-type: none"> Shauna Karls LATAM ✖ 		\$10,400,000 ↕	\$8,634,231	\$1,765,769	\$2,752,685 ↓	\$1,247,300 ↕	\$135,701,706
<ul style="list-style-type: none"> <ul style="list-style-type: none"> Vicky Beaudry Corporate ✔ 		\$4,550,000 ↕	\$3,667,910	\$882,090	\$140,501 ↓	\$752,300 ↕	\$129,929,420
<ul style="list-style-type: none"> <ul style="list-style-type: none"> Kelly Parker Enterprise ✖ 		\$5,850,000 ↕	\$4,966,321	\$883,679	\$2,612,184 ↑	\$495,000 ↕	\$5,772,286
<ul style="list-style-type: none"> <ul style="list-style-type: none"> Susan Wright North America ✖ 		\$6,750,000 ↕	\$6,428,220	\$321,780	\$5,950,000 ↑	\$1,695,000 ↕	\$10,411,083

Best-in-Class Marketing Automation Stack

Average number of marketing products used by the best-in-class companies: 15+

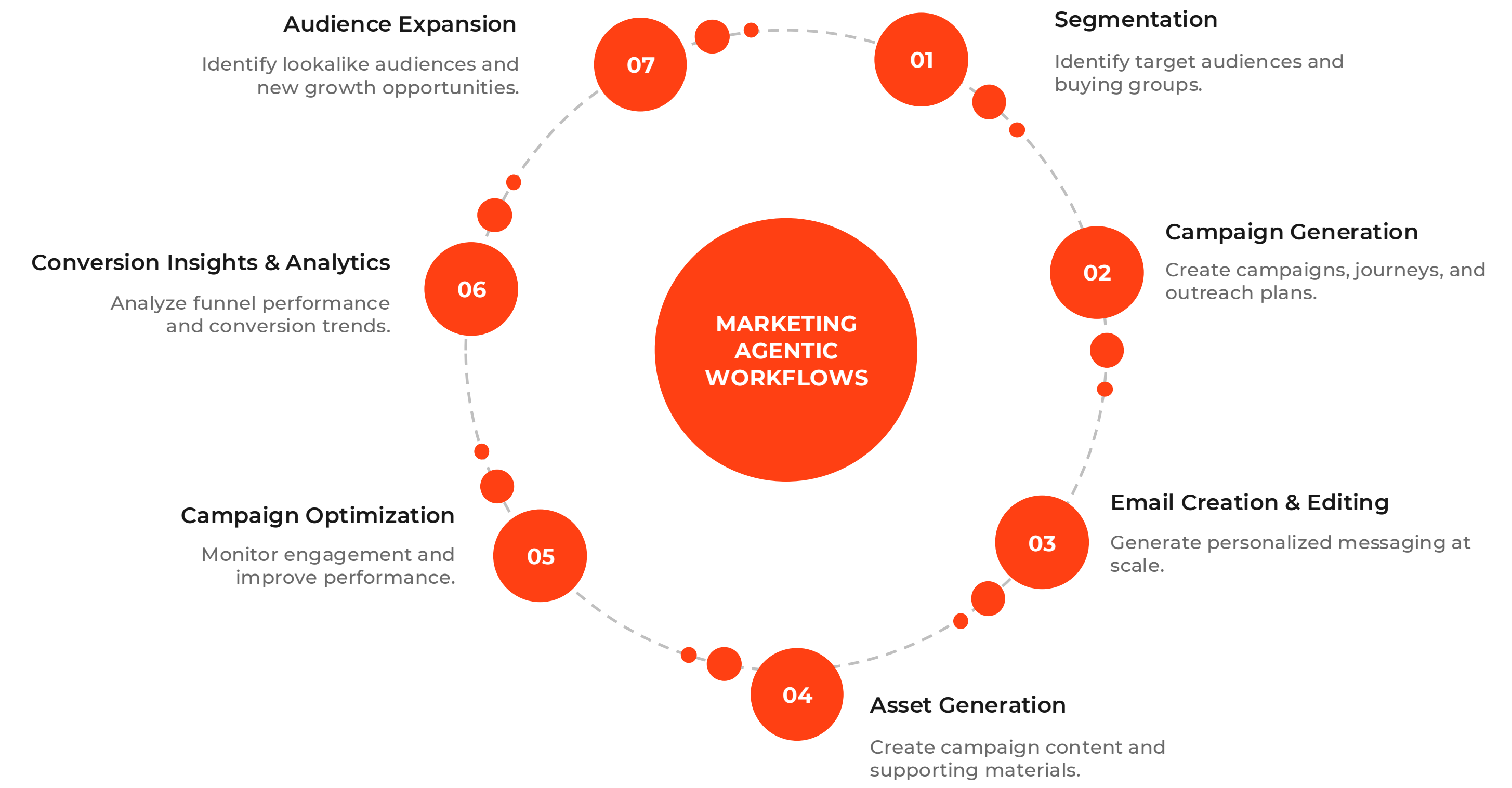


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Best-in-Class Marketing Agentic Automation



Marketing Platform 10X

The screenshot displays the Creatio interface. On the left, a landing page titled "FinServ Digital Innovation Summit Banking Fintech Professionals" is shown in design mode. The page features a large heading "Meet Industry Leaders" and a "Reserve My Spot" button. On the right, a chat window titled "FinServ Digital Innovation Summit Invite" shows a conversation with the "Landing Page Generation Agent". The agent has generated a landing page and provided a link to view and customize it.

Landing Pages and Lead Capture

The screenshot displays the Creatio interface for configuring a campaign flow. The main view shows the "Insurance Summit Registration Flow" with a status of "Planned". The campaign flow is visualized as a sequence of steps: "Summit Registration Landing" (purple diamond), "Summit Registration Email" (purple square), "Wait 3 Days (1)" (orange circle), "Event Agenda Email" (purple square), and "Wait 3 Days (2)" (orange circle). The right-hand panel provides a summary of the campaign, including a list of steps and a confirmation message from the "Campaign Generation Agent" stating that the campaign is ready for review.

Advanced Marketing AI Agents

Marketing home page

Filter by: Created on date

CLIENT JOURNEY EVENTS BOUNCE MONITORING

Open leads

103

Opens (total), %

35.40

Clicks (total), %

36.10

Sent emails (total)

2,604

Delivered emails (total)

2,489

Lead conversion rate, %

75

Lead source dynamics



Click and open rate, %



Home

Dashboards

Contacts

Accounts

Leads

Bulk emails

Best-in-Class Service Automation Stack

Average number of service products used by the best-in-class companies: 10+

Contact and Account Management

Case Management

Service AI Agents

Omnichannel Hub

Telephony / CCaaS

SLA Tracking

Problem Management

Knowledge Management

Embedded Experience

Workforce Management

Service Workflow Management

Guided Resolution

Chatbots and Virtual Assistants

Remote Support and Screen Sharing

Customer Feedback Management

Service Dashboard & Analytics

Agent Workplace

Real-Time Agent Experience

Field Service and Dispatching

IVR

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Problem Management

Knowledge Management

Embedded Experience

Workforce Management

Service Workflow Management

Guided Resolution

Chatbots and Virtual Assistants

Remote Support and Screen Sharing

ITSM

Service Dashboard & Analytics

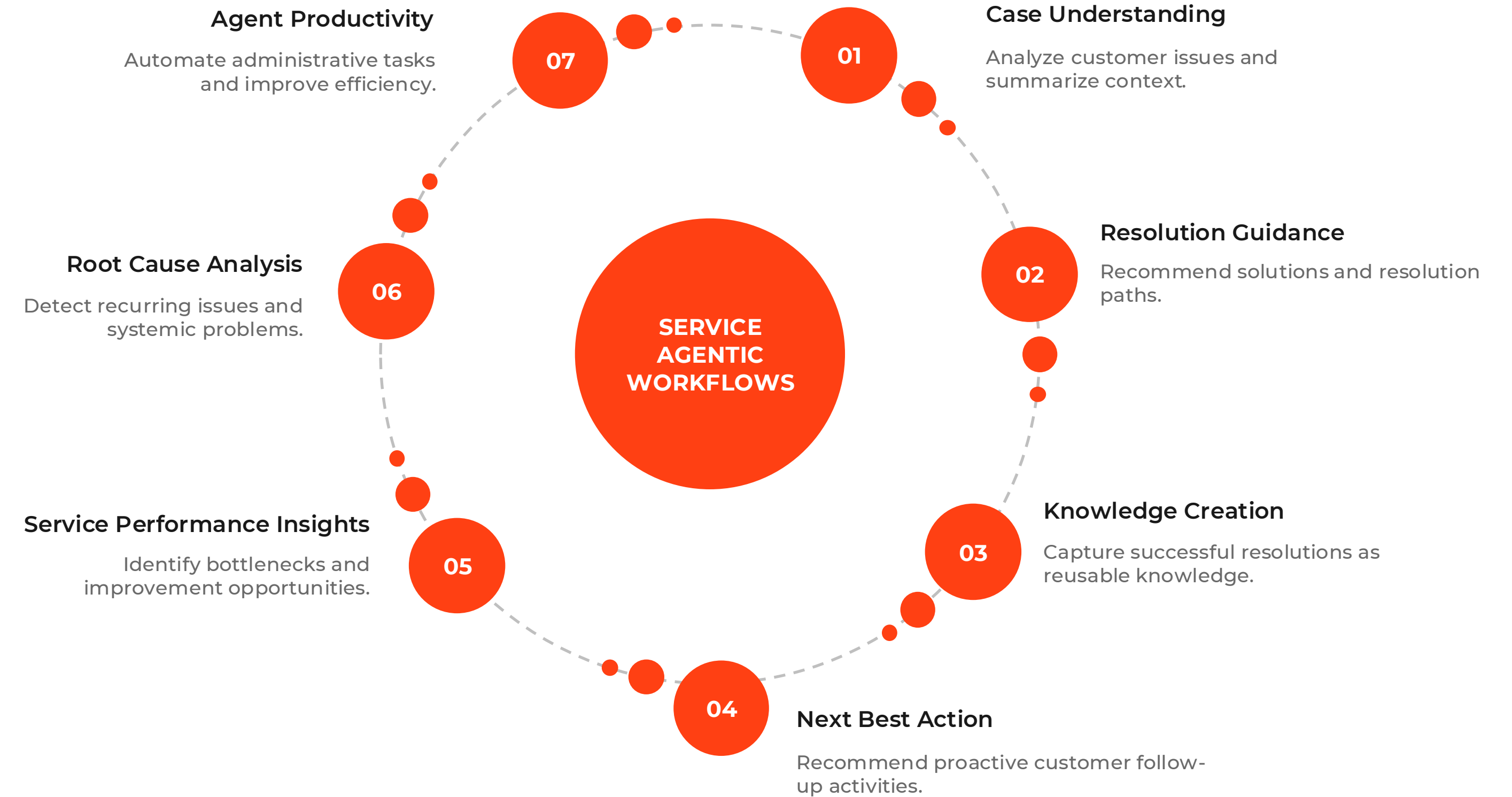
Agent Workplace

Real-Time Agent Experience

Field Service and Dispatching

Review and reputation management

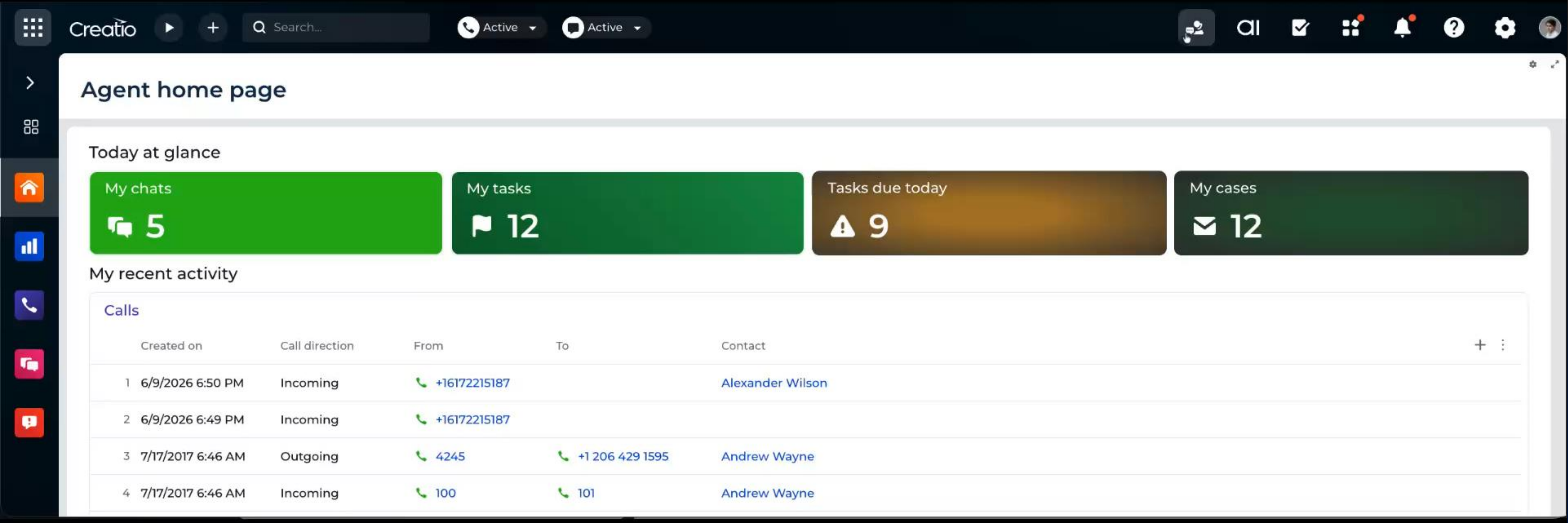
Best-in-Class Service Agentic Automation



Releasing now: **Service Platform 10X**

The screenshot displays the Creactio Service Platform 10X interface. On the left, an 'Agent Inbox' shows a chat conversation with Alexander Wilson. The main panel displays a customer profile for Alexander Wilson, including contact information and account details. The 'ANALYTICS' section features several charts: 'Total sales' at \$1,608,265, 'Open opportunities' at 47, 'Satisfaction score' at 4, 'Last activity date' on 1/2/2026, 'Next activity date' on 2/20/2025, and 'Avg order amount' at \$3,700.62. Below these are charts for 'Purchased products/services', 'Orders by month', 'Support cases by month', and 'Activities by month'. The 'Account info' section shows 'Alpha Business' with a category of 'A' and an industry of 'Manufacturing and di...'. An orange banner at the bottom reads 'Real-Time Agent Experience'.

The screenshot shows the Northwest Bank website. The main heading is 'Banking Made Simple' with the tagline 'Experience secure, modern banking with competitive and exceptional service. Your financial future starts here'. Navigation links include 'Products', 'Services', 'About', and 'Contact Us'. A 'Learn More' button is in the top right. A 'Customer Servicing AI Agent' chat window is overlaid on the right, showing a conversation with the AI agent. The chat window includes a 'Learn More' button, a 'Connected to live agent' status, a message from the AI agent: 'Hello! How can I help you today?' at 08:42 AM, and buttons for 'Check transactions', 'Open account', and 'Talk to agent'. An input field at the bottom says 'Type your message...'. An orange banner at the bottom reads 'Chatbots and Virtual Assistants'.



Agent home page

Today at glance

My chats
5

My tasks
12

Tasks due today
9

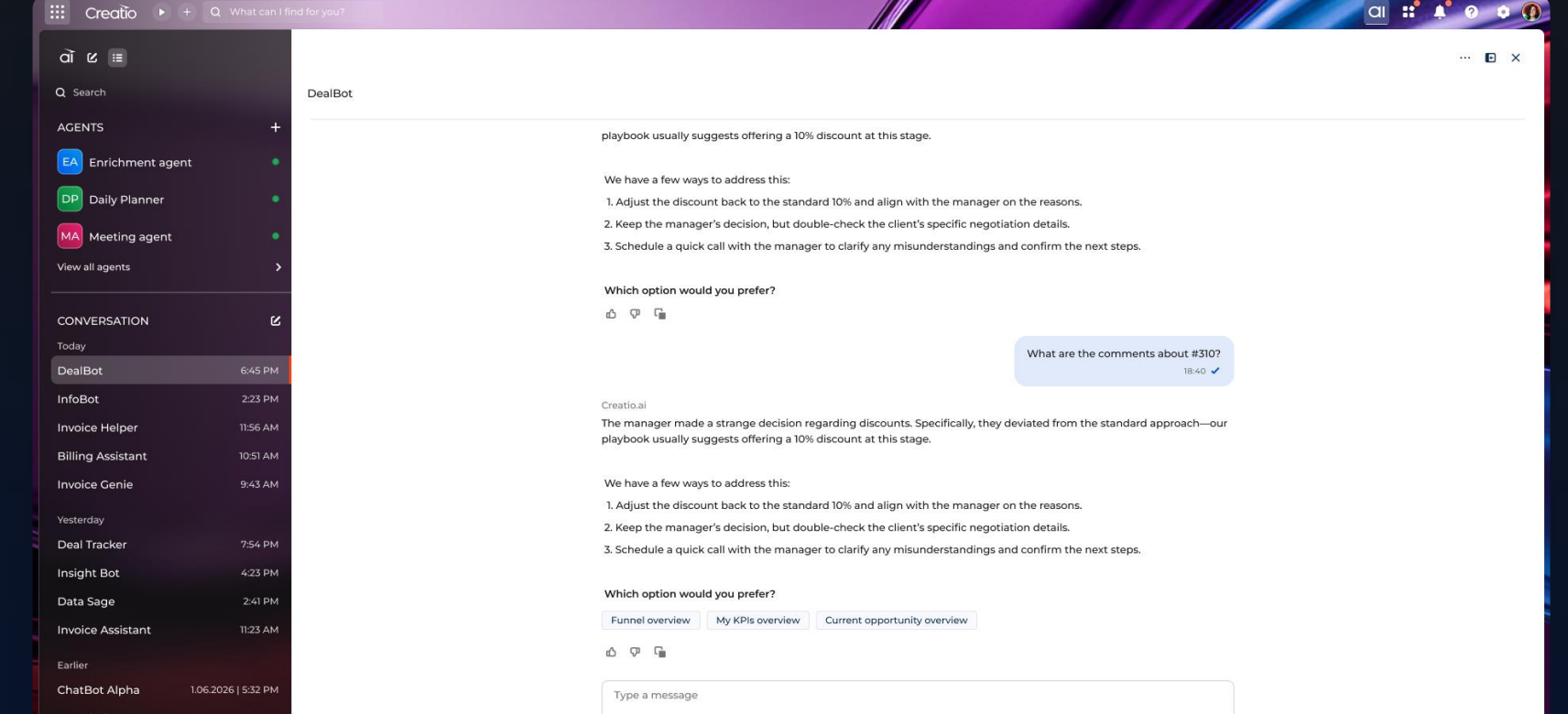
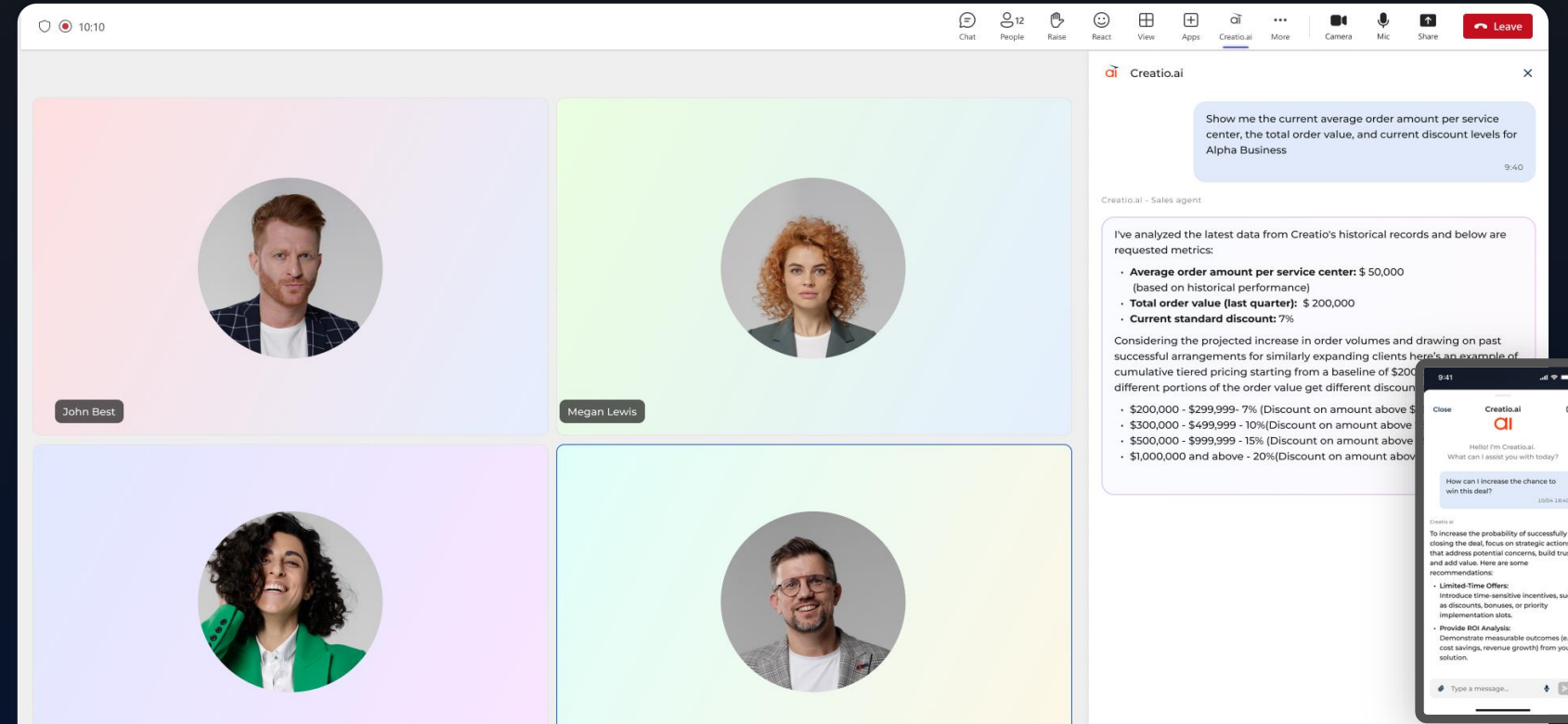
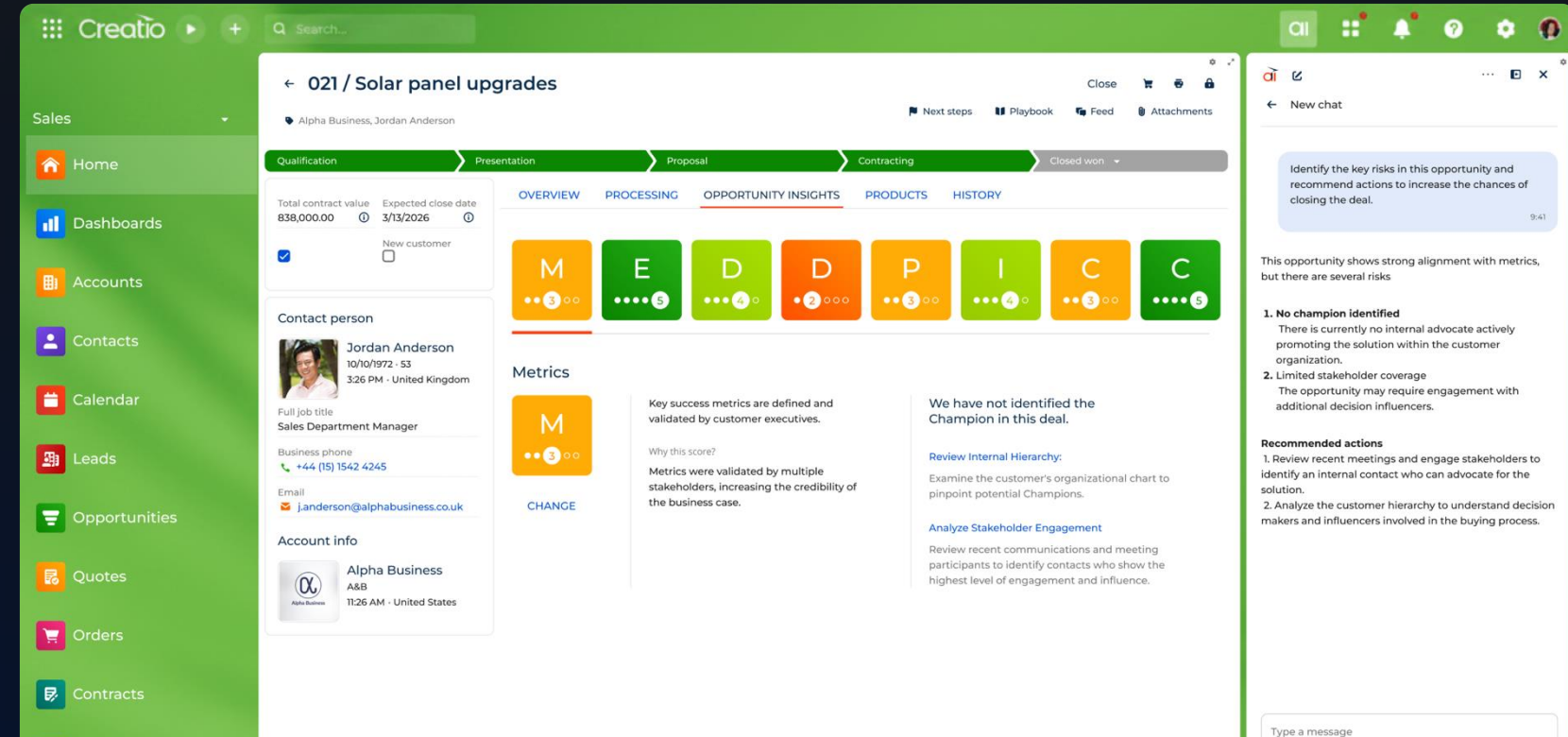
My cases
12

My recent activity

Calls

	Created on	Call direction	From	To	Contact	
1	6/9/2026 6:50 PM	Incoming	+16172215187		Alexander Wilson	
2	6/9/2026 6:49 PM	Incoming	+16172215187			
3	7/17/2017 6:46 AM	Outgoing	4245	+1 206 429 1595	Andrew Wayne	
4	7/17/2017 6:46 AM	Incoming	100	101	Andrew Wayne	

ALWAYS-ON CRM EXPERIENCE



CREATIO
FREEDOM UI

PRODUCTIVITY
TOOLS

CONVERSATIONAL
CRM

Creatio

Industries

Best-in-Class Banking Automation Stack

Customer onboarding

Relationships management

Application management

Marketing templates

Transaction management

Customer profile

Consultations

Lead and Referral management

Advanced contact center

Underwriting

Customer intelligence and life events

Service requests management

Advanced NBO and NBA

Growth AI agents

Online/digital banking

Household management

Banking product catalog

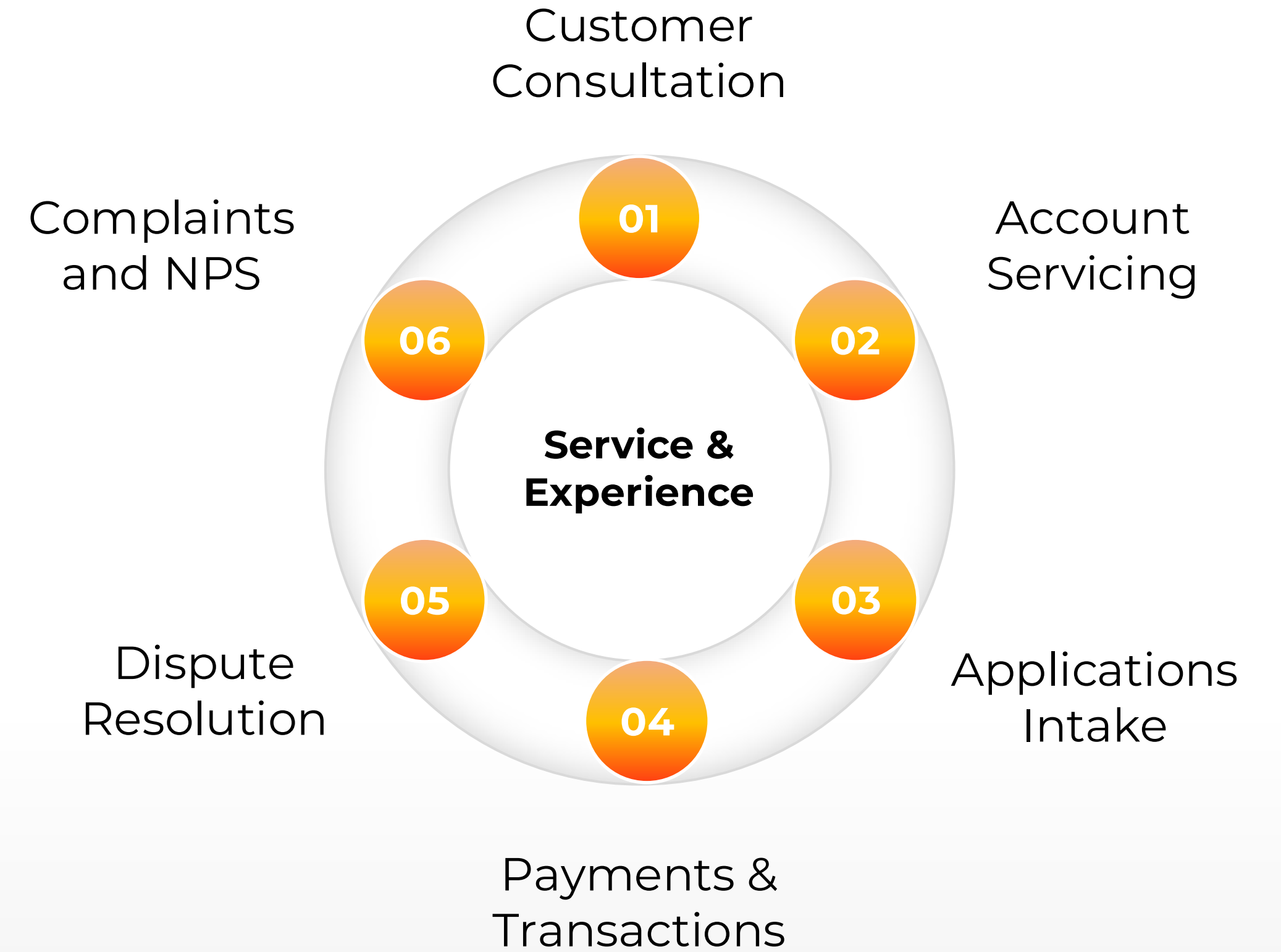
Commercial sales

Servicing AI agents

Treasure management systems



Banking **Autonomous AI Agents Lifecycles**



Best-in-Class Manufacturing Automation Stack

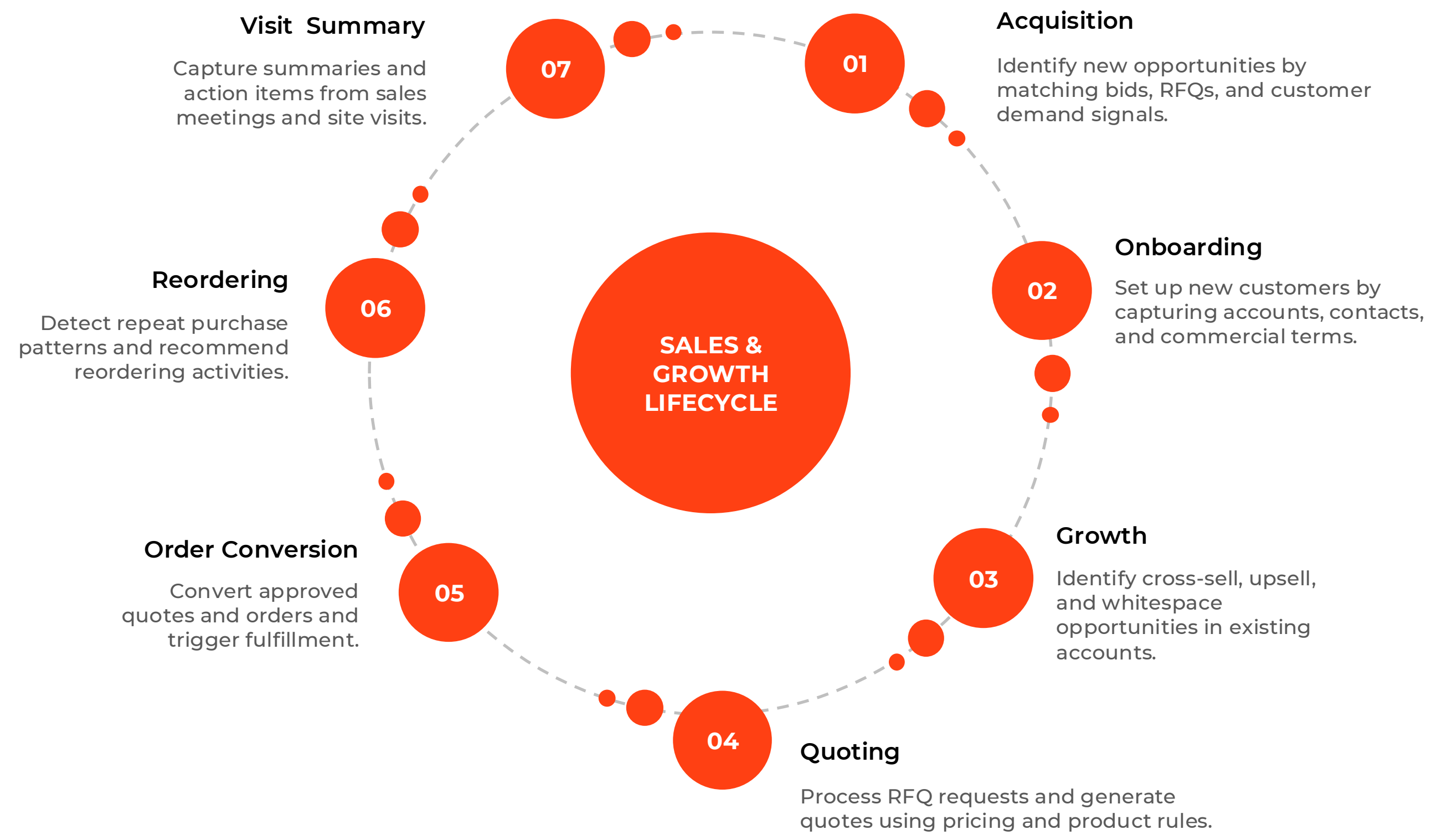
Average number of products used by the best-in-class companies: 10+



Creatio

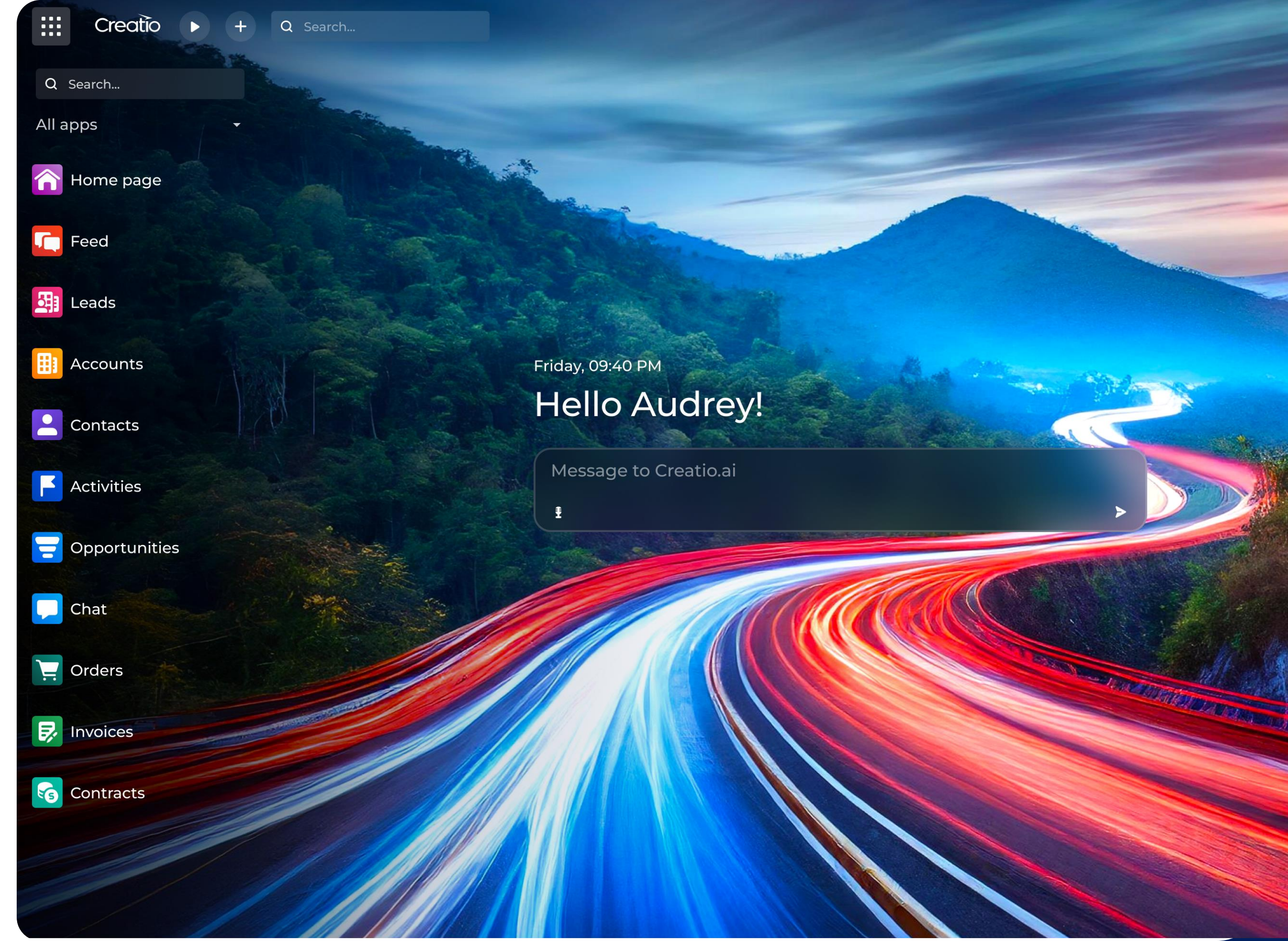
Distribution.AI

Autonomous Agents



Unlimited CRM

1. Enjoy best-in-class capabilities for GTM teams
2. Boost productivity and efficiency
3. Reduce number of applications
4. Increase ROI
5. Reduce TCO





One Platform.

Freedom.

Genuine Care.