

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 background.

AGENTIC LEADERSHIP

NO-CODE DAYS

F L O R I D A

Creatio Strategy Outlook:

Five Pillars of Unlimited Enterprise





People and
AI Agents
working together

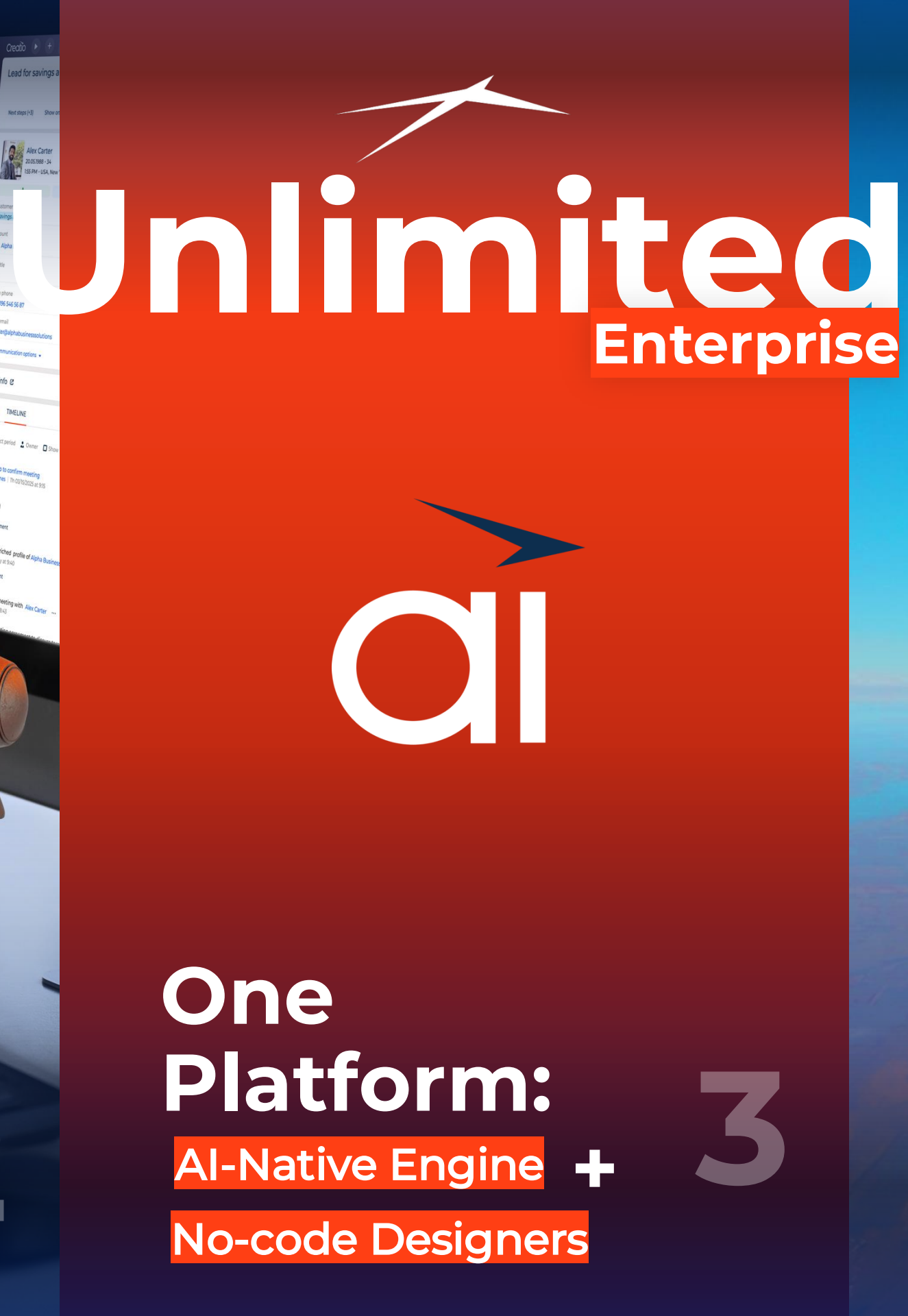
1



Best-in-Class

CRM and
Industry
Workflows

2

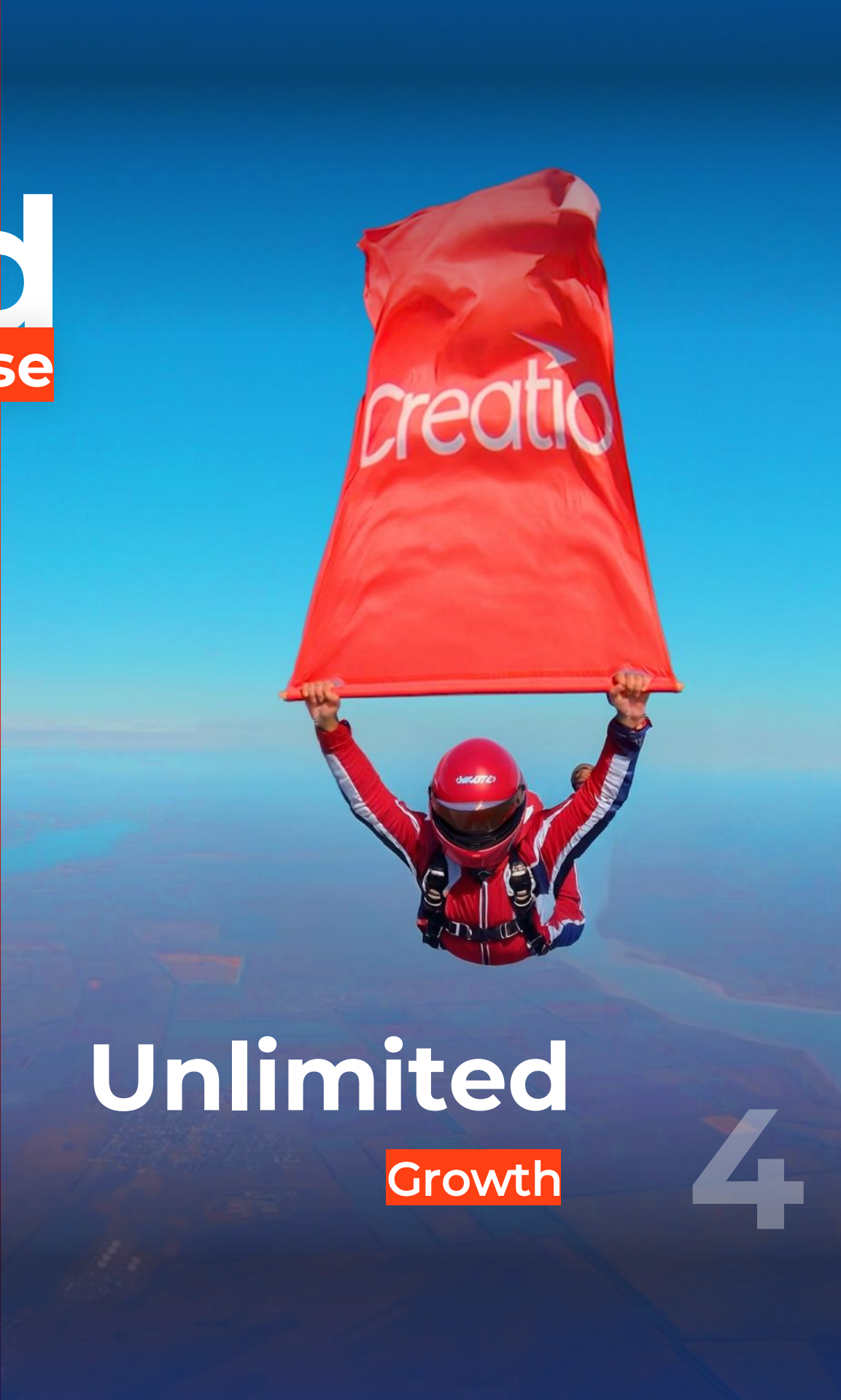


Unlimited
Enterprise

ai

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

3



Unlimited
Growth

4



Genuine

Care

5

People and AI Agents

working together



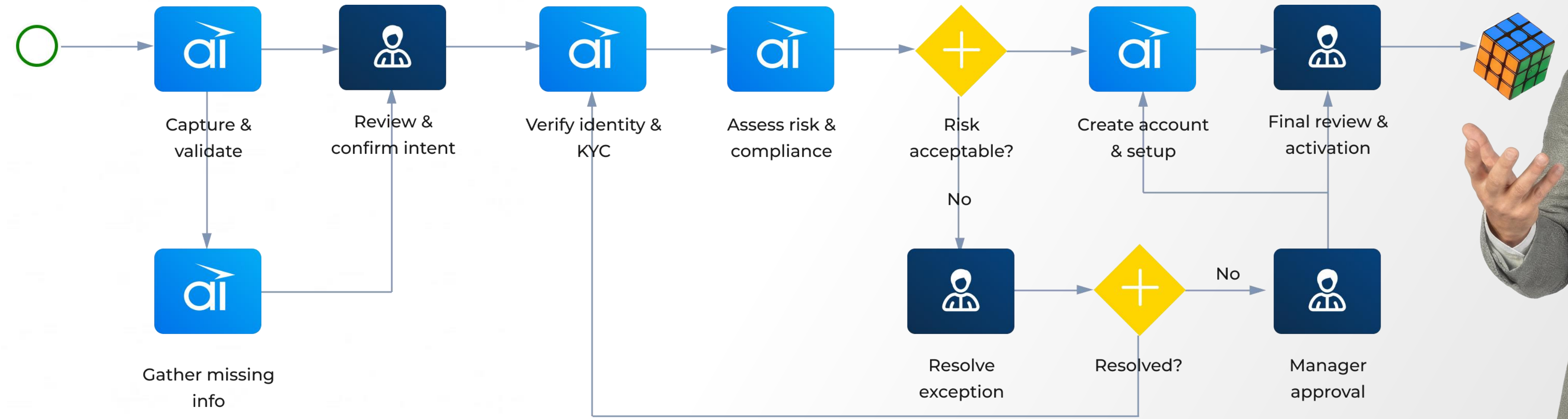
A woman with blonde hair, wearing a bright orange blazer and matching trousers, stands smiling in a park. She is wearing a white t-shirt with a cartoon robot graphic. The background shows trees with autumn foliage and modern buildings.

People and AI Agents

working together

- 1. One platform** to orchestrate and run human-led and agentic workflows
- 2. Agent assistants:** do more in less time
- 3. Autonomous agents:** you sleep, they work 24x7

One Workflow: Across Humans and AI Agents



The Spectrum of Modern Workflows

Mostly Human-Led

Executive relationship management
Complex negotiations
Partner relationships development
Consultative customer engagement
Customer conflict resolution
Cross-functional alignment
Pricing exceptions and approvals
Escalation management
Performance feedback



Hybrid Collaborative

Prospecting
Opportunity progression
Customer onboarding
Campaign management
Marketing content generation
Configure Price Quote
Case resolution
Renewal management
Forecast management



Mostly Agentic

Lead scoring
Data enrichment & classification
Intent signal monitoring
Meeting scheduling and confirmation
Health score calculation
Win/loss analysis
Document intake & processing
Tier-1 ticket resolution
Compliance evidence gathering

THE AGENTIC AI OPPORTUNITY IS REAL

86%

of executives see AI agents as
mission-critical

- The State of AI Agents and No-Code Report, Creatio

ROADBLOCKS TO SCALING AGENTIC AI

29%

Legacy system integration

29%

Risk and compliance concerns

25%

Lack of technical expertise

RICK REUTER

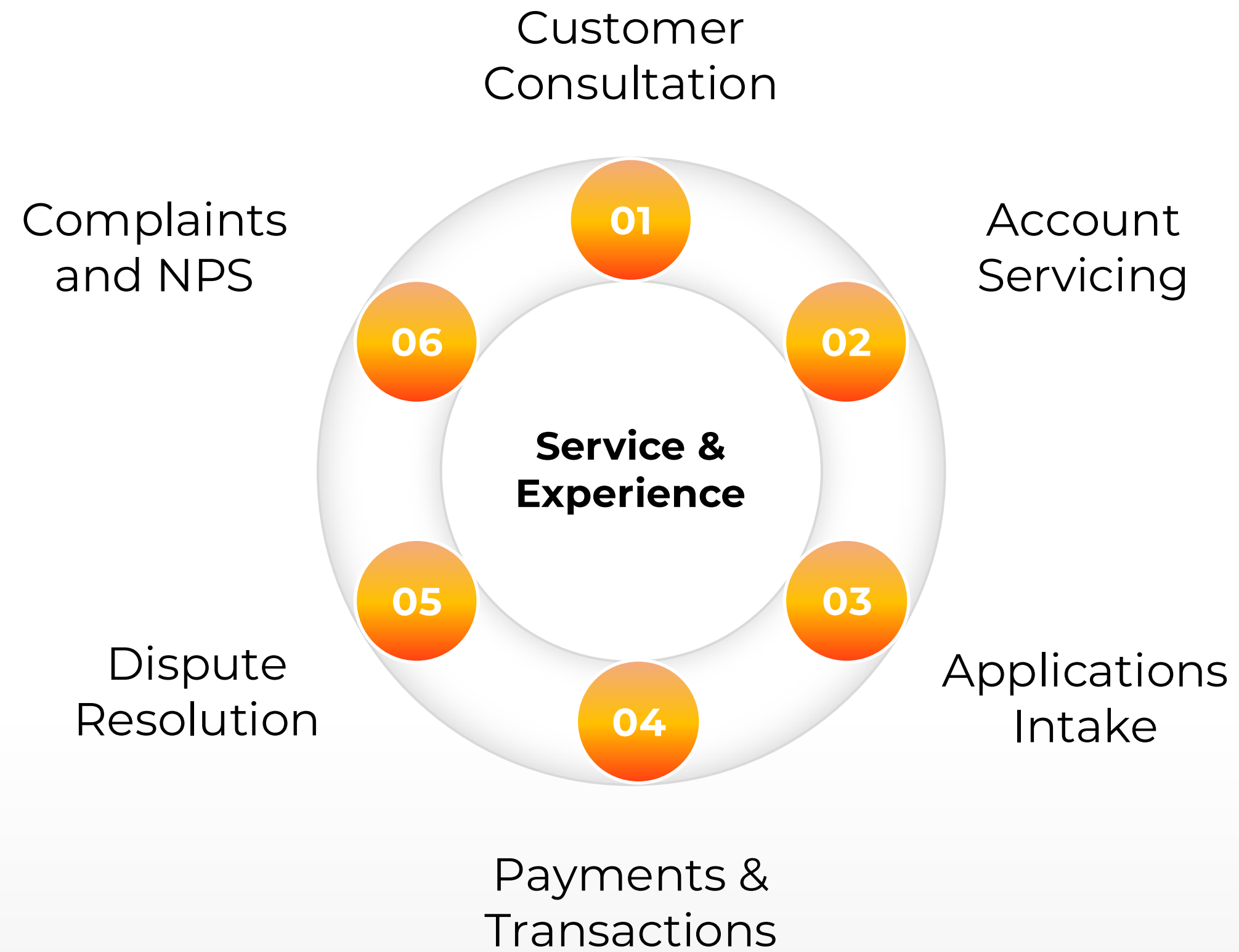
Principal / Partner,

Deloitte.
Digital

- AI Trends 2025: Adoption Barriers and Predictions, Deloitte



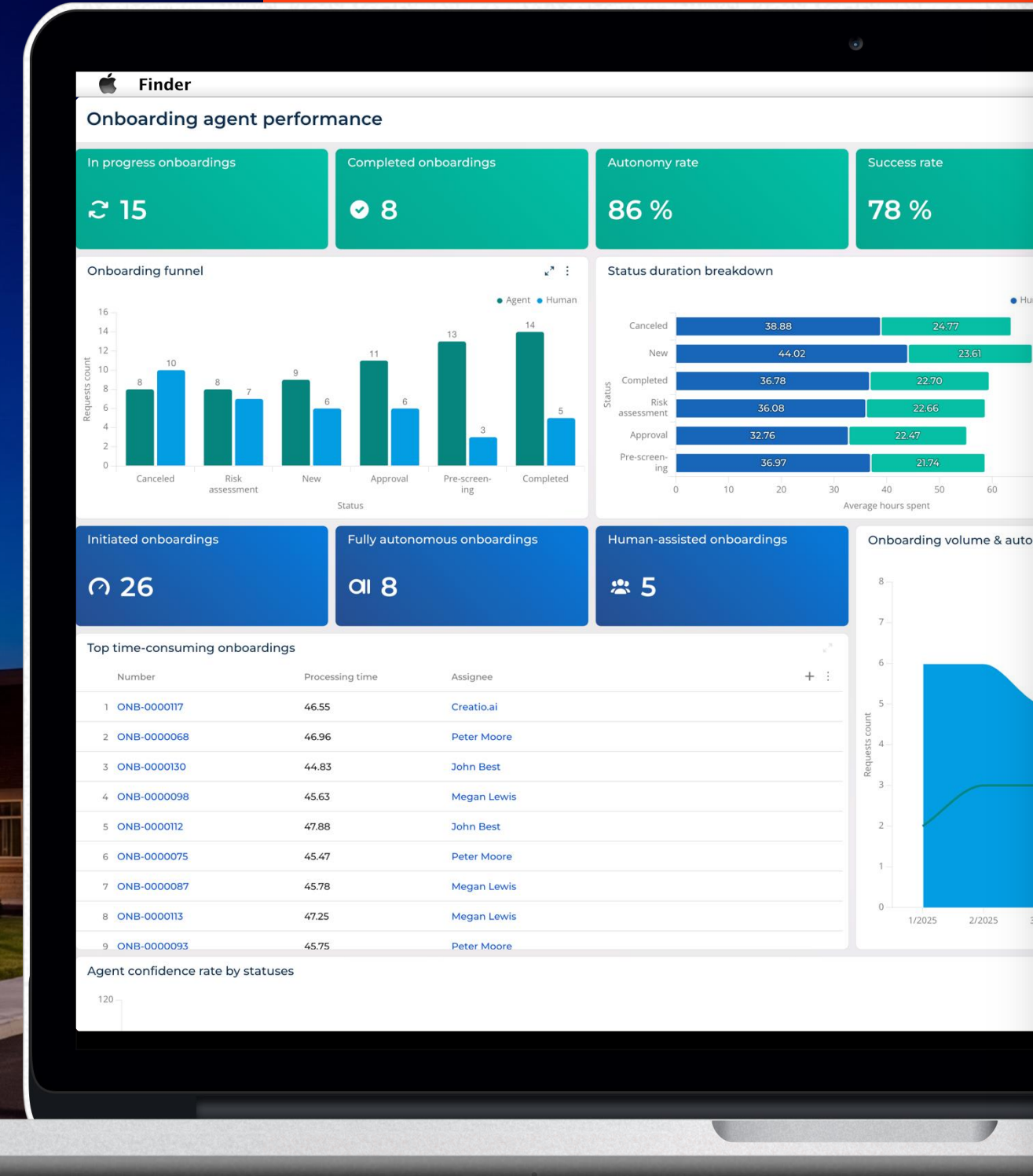
Banking **Autonomous AI Agents Lifecycles**



Transforming Customer Onboarding with AI Agents

**DREW
MCMONIGLE**

CTO



- End-to-end onboarding orchestration
- Automated data collection and validation
- Faster approvals through document pre-verification
- Dynamic AI-driven conversational journeys

ASTANA MOTORS



Revolutionizing Dealership with **AI Agents**

70% faster

customer enquiry
processing

700+

sellers using AI
agents daily

2 months -> 3 days

drastically faster contract approval



**TIMUR
TABAKAEV**

Chief Digital
Transformation Officer

ASTANA **MOTORS**

Best-in-Class

CRM and Industry Workflows



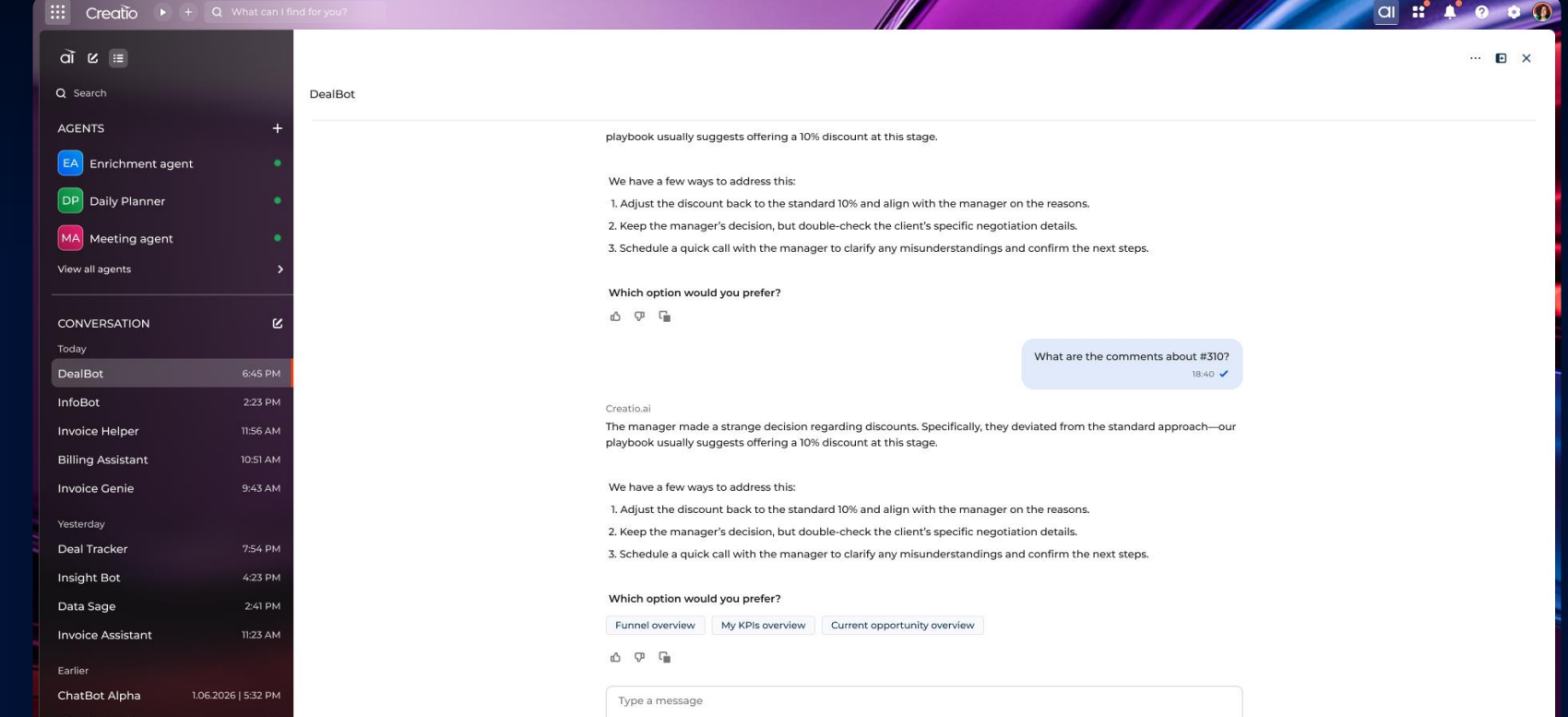
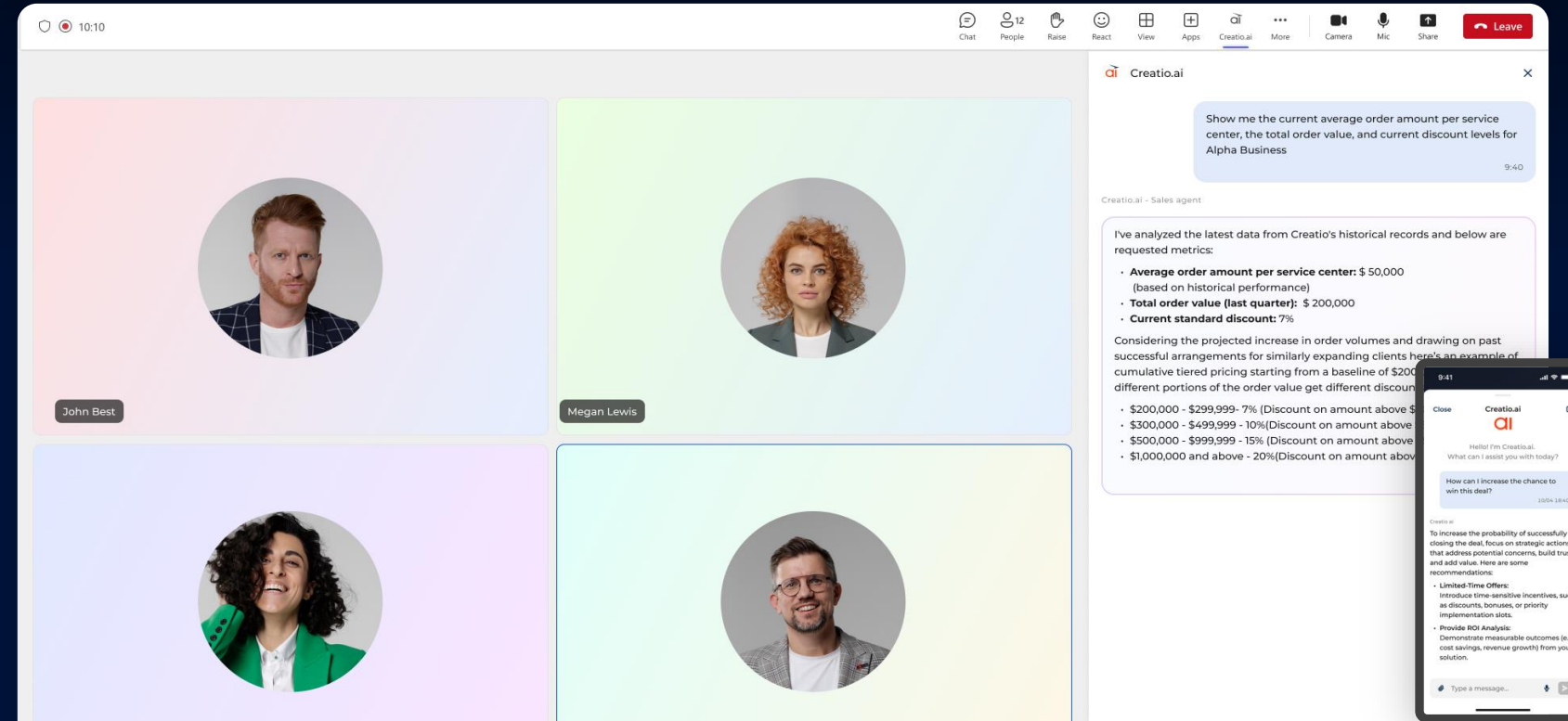
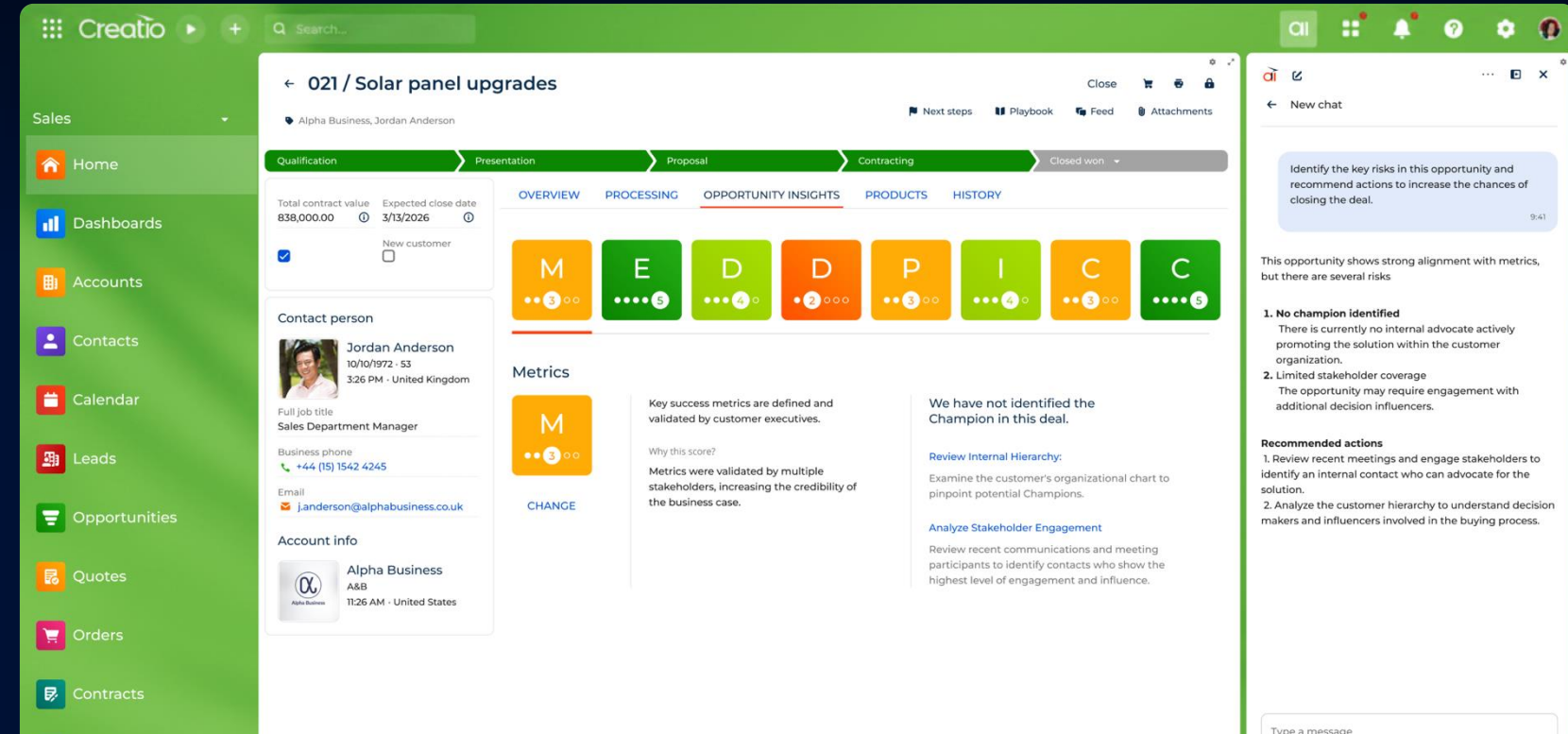
Best-in-Class

CRM and Industry Workflows



- 1. Best-in-class CRM** for sales, service, and marketing recognized by Gartner and Forrester
- 2. AI Agents** across every CRM touchpoint
- 3. Ready-to-use industry workflows**

ALWAYS-ON CRM EXPERIENCE



CREATIO
FREEDOM UI

PRODUCTIVITY
TOOLS

CONVERSATIONAL
CRM



PSI 

Building an **Agentic Sales** Organization

15

Countries
worldwide

2,400

Global experts



**CLAUDIO
RANAUDO**

Global Chief Sales
Officer

PSI 



The background of the entire image is a photograph of a modern, multi-story office building with large windows. The building's facade is light-colored, and the windows reflect the warm, golden light of a sunset or sunrise. The sky is filled with soft, orange and yellow clouds. A large, red, diagonal graphic element cuts across the center of the image, serving as a backdrop for the main text.

S.P. RICHARDS CO.

Transforming
Distribution at
Lightning Speed

90 days

to replace Salesforce
and ServiceNow

A red pushpin is pinned to the top right corner of the white callout box.

**TONYA
MOORE**

Senior Director
Sales Operations

S.P. RICHARDS CO.™

THE FUTURE IS INDUSTRY-SPECIFIC

70%

of enterprises will use
industry cloud platforms
by 2027

15%

2023

2027

**SEBASTIEN
FORGET**

President & Owner,



**BARNEY
HOLMES**

SVP CRM,



- Top Strategic Technology Trends: Industry Cloud Platforms, Gartner

Industry Context Creates Business Impact

Banking

70%
faster new workflow delivery

30%
tech cost saving

ONE
Unified Platform
replacing legacy fragmented systems

88%
accelerated project delivery

41%
productivity gains with AI

Public Sector



NUCLEUS
RESEARCH

Benefit case study: Creatio accelerates project by 88% for a government platform



NUCLEUS
RESEARCH

Benefit Case Study: Creatio reduces technology costs by 30 percent

**CAMERON
MARSH**
Senior Analyst,



NUCLEUS
RESEARCH

Overview

Technology buyers and decision-makers are increasingly shifting toward integrated suites, seeking a unified approach that minimizes the pitfalls of fragmented systems. In an environment where diverse applications are often stitched together, organizations often grapple with disjointed user experiences, inconsistent interfaces, and integration headaches that complicate everyday operations. These challenges become especially pronounced for organizations that require highly customized CRM solutions, and the necessity to merge disparate systems can lead to slow time-to-value, escalated costs, and an unnecessarily complex IT landscape.

The traditional approach to customization, relying on separate tools and functionalities, and the constant struggle to balance innovation with operational efficiency. In contrast, Nucleus found that Creatio's platform delivers a more seamless, no-code environment that effectively unifies key business processes. The recent Energy Release further enhances this offering by streamlining workflows, boosting productivity, and accelerating implementation timelines. By addressing these longstanding integration issues, Creatio enables organizations to achieve a cohesive user experience and a faster, more cost-effective deployment.

Creatio

Creatio delivers a unified no-code platform for CRM and workflow automation, enabling organizations to streamline customer-facing processes, automate operations, and drive growth. The platform combines strong automation capabilities with low and no-code development tools, allowing both IT and business users to adapt, customize, and deploy solutions efficiently. Integrated AI and analytics tools generate actionable insights that optimize workflows, improve decision-making, and enhance operational performance. A primary differentiator for Creatio is its flexible no-code framework, which supports rapid solution deployment and continuous process optimization. This adaptability enables organizations to scale workflows without extensive technical requirements, and

Why Organizations Choose Creatio

Nucleus interviewed several Creatio customers to identify the primary factors that led them to implement Creatio over other competitors in the CRM market.

Reduced Total Cost of Ownership. Many organizations reported that the decision to implement Creatio over other competitors, including Salesforce and Microsoft, was largely because of its lower total cost of ownership. On average, Creatio customers reported a 37 percent reduction in costs, stemming from avoided IT expenses, streamlined integrations, and a straightforward pricing model that avoids hidden costs. By mitigating the high operational overhead and complexities associated with Salesforce, Creatio delivers immediate fiscal benefits and frees up resources that can be reinvested in strategic initiatives for sustained growth.

Faster Time-To-Value. Organizations also reported that they believed Creatio would deliver a faster time-to-value compared to the other vendors on their short list. Rather than enduring long customization cycles and extensive specification drafting, users cited Creatio's intuitive drag-and-drop interface and no-code approach as key features that drove this perception. Creatio's no-code approach minimizes the reliance on developers and IT intermediaries, enabling users to tailor workflows in real time. One customer estimated that Creatio accelerated their go-live date by at least six months, with another customer migrating from Salesforce reporting a nearly 70 percent reduction in implementation time. Overall, the streamlined approach ensures every lead is acted upon promptly, helping organizations meet strict SLAs and improve conversion rates by 11 percent on average.

Typical Benefit Areas

Enhanced Lead Management

In many industries, the speed at which organizations respond to new leads is critical. A swift response can mean the difference between converting an inquiry into a lucrative opportunity or losing it to a competitor. Creatio's platform is designed to ensure that leads are captured instantly and routed to the right team without delay. Upon lead response of 61 percent. Customers cited integration capabilities with existing systems helped create a real-time data flow that keeps all relevant customer information at users' fingertips. This enables teams to quickly assess and act on each inquiry, whether it pertains to property sales, legal referrals, or other specialized services. By automating lead identification with a no-code drag-and-drop interface, Creatio minimizes manual effort and reduces the need for extensive IT support. This streamlined approach ensures every lead is acted upon promptly, helping organizations meet strict SLAs and improve conversion rates by 11 percent on average.

Increased Employee Productivity

Creatio's no-code, drag-and-drop interface eliminates the need for lengthy specifications and reliance on IT developers, allowing employees to quickly tailor workflows to their unique needs. Creatio's user-friendly interface automates routine tasks and reduces manual data entry by approximately 17 percent, enabling teams to focus on more pertinent work. By streamlining operations and supporting agility, Creatio allows staff to work more efficiently with workflows more tailored to their individual preferences.

Improved Customer Engagement

Creatio's ease of integration

Creatio customers reported a 61 percent average decrease in the amount of time it takes to respond to incoming leads, resulting in an 11 percent average improvement in conversion rates

Creatio to replace a fragmented ecosystem of legacy operational systems. The deployment consolidated seven separate tools into one both IT and business users to design and automate workflows ing expertise. Within the first year, the organization achieved a 30 plication management costs by eliminating redundant software deployment contracts. Time for deployment for new process months to weeks, enabling teams to deliver new workflows up to t demonstrates that Creatio's no-code approach can accelerate tending governance and integration with core banking systems.

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



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



- 1. AI-native engine:** build 10X faster with coding agents and the most modern AI stack
- 2. Advanced No-Code designers** to streamline visual configuration
- 3. Open and composable:** use any LLM, embed any component into the composable architecture of Creatio
- 4. Enterprise-grade scale and governance:** controls, compliance, and observability for safe execution

CRM Applications and Assistive Agents

Olivia Johnson, Alpha Business

Health score: 89% | NPS: 73/100 | Days from the last co...: 6 | Renewal in: 120 days

Customer need: Platinum card | Contact: Olivia Johnson | Account: Alpha Business

Next best offers

Engagement: Forms submit (last 3 mo.): 2 | Duration of last visit, sec: 336

Agent responses:

1. Reviewed business-relevant rewards (fuel, advertising, travel spend).
2. Spent considerable time on insurance and coverage, typical for financially cautious entrepreneurs.
3. Viewed eligibility criteria, suggesting he is checking his qualification likelihood.
4. Opened prequalification form but did not complete.

Industry Workflows and Agents

Lead for savings account

Alex Carter
20/05/1988 - 34
155 PM - USA, New York
CEO

Tasks:

- Sales KPI: Sales KPI Snapshot: Weekly Performance Overview with Team
- Quotes: Overdue Quotes: Immediate Follow-Up Required
- Upsell: Upsell Opportunities: Identifying Potential

Chat: Recommend the best knowledge base materials to prepare for the meeting with this lead.

Creative AI: Clean Power, Revolution of energy

Custom Applications and Agents built with Coding Agents

Cases

Service performance overview

- Average resolution time...: 403
- Overdue cases (response): 19
- First contact resolution, cases: 29
- Number of evaluated cases: 45

Cases by service

- Physical installation...: 9%
- Battery performance ch...: 18%
- Cleaning service: 5%
- Errors in the equipm...: 6%

Planned vs Actual resolved cases

Planned to resolve (blue), Actually resolved (red)

Chat: I feel like our customer request processing times are getting slower again. But I'm not sure what's causing it.

Service Agent: I've detected a recurring issue — the billing module slows down during Monday report generation. That's the root cause.

Can we prevent it?



STUDIO

No-Code

The screenshot displays a CRM interface for a customer named Olivia Johnson. The interface is divided into several sections:

- Header:** Shows the customer name "Olivia Johnson" and a "Save" button. Below the name are tags: "VIP", "Key Account", "ABM Campaign", and "+4 Add tag".
- Sales Funnel:** A horizontal bar at the top shows the stages: Qualification, Presentation, Proposal, Contracting, and Closed won. The "Contracting" stage is currently active.
- Next Best Offer:** A red box highlights a "Next best offer" with "+4 best offers". The offer is "2% cash back on eligible supermarket net purchases credit limit - 20 000\$" with an "89% relevance".
- Customer Profile:** A card for Olivia Johnson shows her photo, name, and contact information: "01.01.1990 (32) • Canada".
- Engagement Summary:** A section titled "INTERACTION SUMMARY" includes:
 - Engagement:** "Forms submit (last 3 mo.)" with a value of 2 and "Duration of last visit, sec" with a value of 324.
 - Email nurturing:** "Send emails (last 3 mo.)" with 19, "Open (last 3 mo.), %" with 15, and "Clicks (last 3 mo.), %" with 94.
- Timeline and Charts:** A "TIMELINE" tab is selected. A line chart shows "Site visit dynamics & Forms submit dynamics" from 07:00 to 13:00. Another chart shows "Emails d..." with data points at 12.06 and 02.07.

STUDIO

AI

Operations Command Center

Northstar Bank demo | 10 agents

Metric	Value	Details
FLEET LIVE	80%	8/10 online now
THROUGHPUT	52K	60M tokens / 24h
APPROVALS WAITING	14	8 high-risk, 6 medium
DENIED TODAY	8	Governance blocked actions

STUDIO

AI-NATIVE INNOVATION WITHOUT THE SPRAWL

Unmanaged sprawl creates security risks, leaves software deployed as zombies with unknown resource consumption.

**KEN
PARMELEE**

Principal Analyst,
FORRESTER®

“It’s important to start on a platform providing security, scalability, and management for the things that are created.”

- Forrester, AppGen Is Eating Low-Code — What It Means To You, Feb 5, 2026



Powering Mobile-First Field Operations

560,000

Business clients

€44B

Revenue in
2025

215,000

Employees
worldwide



**CHRISTOPHER
BURROWS**
Director of Operating
Systems & Digital
Transformation,
 **VEOLIA**

Unlimited
Growth



Unlimited

Growth



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

THE ECONOMICS OF SAAS ARE CHANGING

88%

of organizations
already use AI

62%

are experimenting
with AI agents

74%

expect significant
agent adoption by
2027

SaaS was built around human productivity
AI is built around scale.

**SEAN
CANTWELL**

Co-Founder and
Managing Partner,

**VOLITION
CAPITAL**



Micky Woolridge
Director of Core Systems and Development



HOWDENS

Accelerating Digital Transformation with No-Code and No Limits

8,300
Users

850+
Depots

Scaled With No Limits on
Creatio Unlimited





Replacing Legacy Technology to **Remove Limits**

**Replaced
Salesforce**
Across the Enterprise

**Creatio
Unlimited**
Scale With No Limits

1,200
Users onboarded

**VIKAAS
YOUNIS**

Chief Information
Officer,





Genuine

Care



Genuine

Care

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



Thank you!

Delivering AI Transformation

**Customer
Success**

**Delivery
Excellence**

**Tech
Advisory**

Tech Support



Strengthening Partnership, Expanding Care

20
Years of
operations

5.5M
Insurance
Customers
Supported

MetLife

**MARIANA
PELLEGRIN**

AVP Digital
Transformation,





Introducing Next-Gen Resident Engagement

500,000
Callouts eliminated

24/7
Access for residents

1,200,000
Properties managed

PHIL TYLER

Chief Information
Officer, Sureserve





People and AI Agents
working together

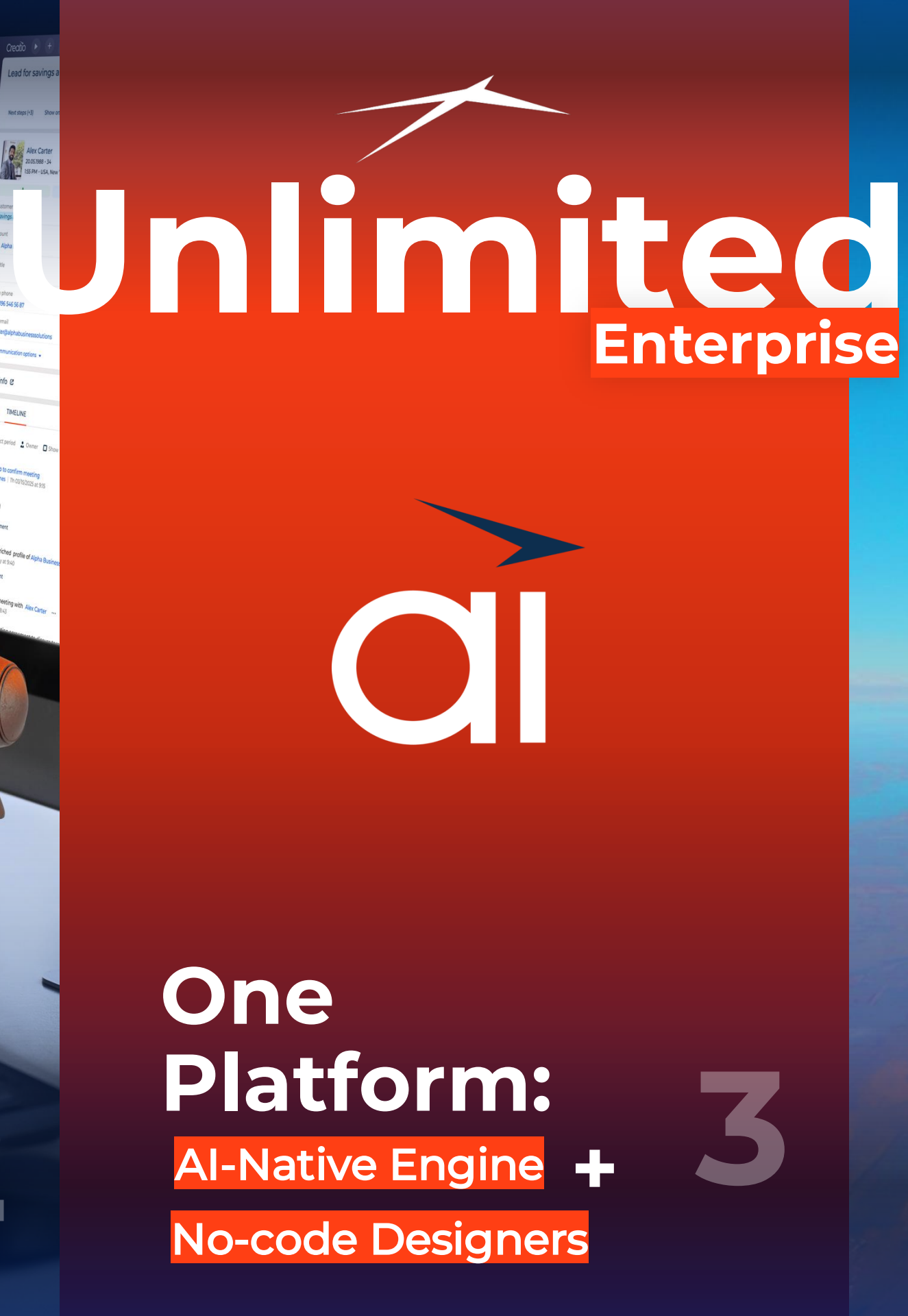
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Best-in-Class

CRM and Industry Workflows

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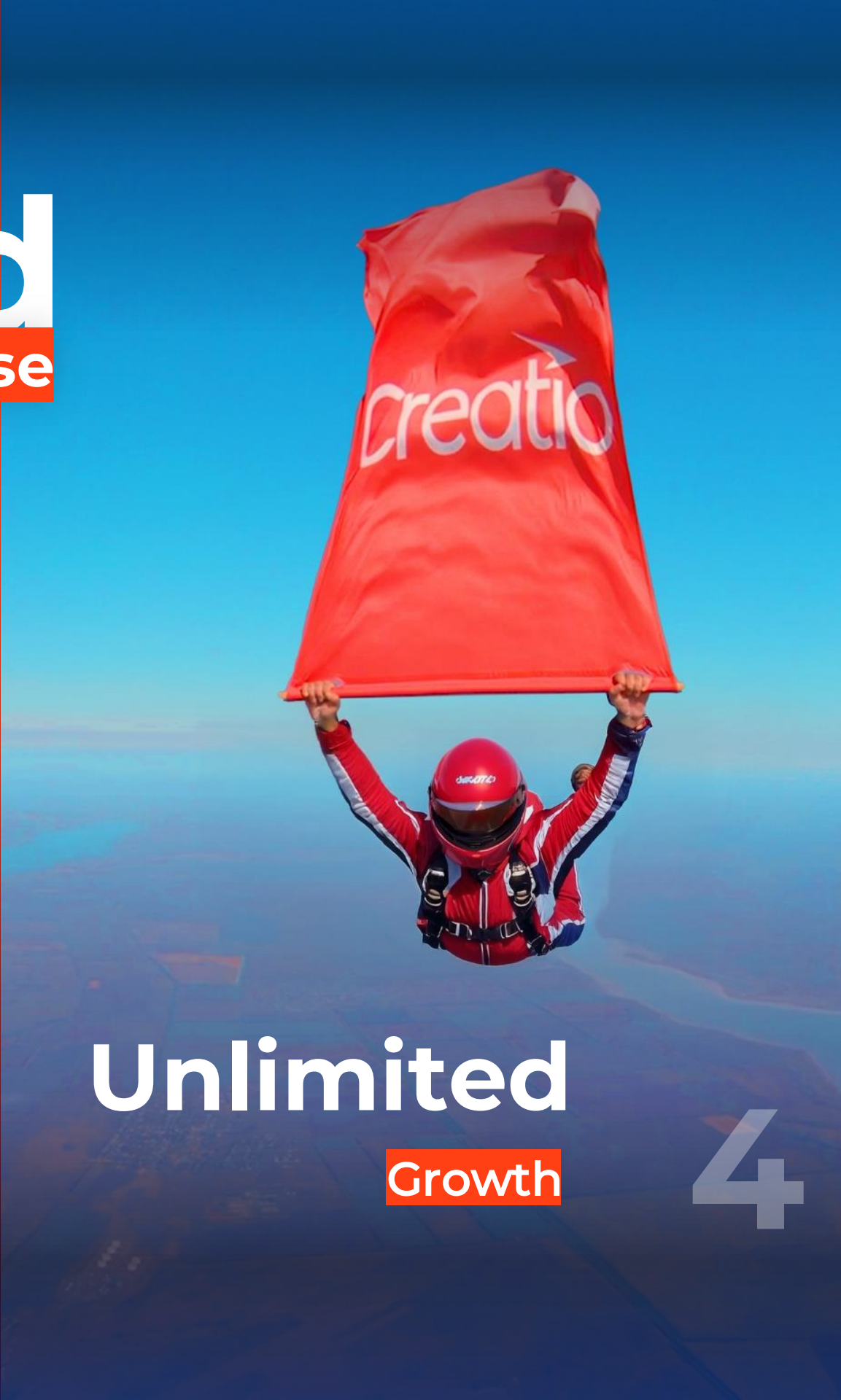


Unlimited
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ai

One Platform:
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3



Unlimited
Growth

4



Genuine

Care

5



One Platform.



Freedom.



Genuine Care.