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It's the Agentic Era for Creatio CRM

Creatio introduces CRM with built-in AI agents, no-code tools, and full-funnel automation.

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More Than Just a Typical CRM + GPT-ification

During a recent analyst briefing, [Creatio unveiled its 8.3 Twin Release](#), another significant step in its transition to an AI-native, agentic architecture. This release centers around the concept of "digital agents as teammates," enabling organizations to augment their workforce with embedded, intelligent assistants across the Creatio platform. Creatio's mission is to simplify enterprise workflows, democratize innovation with no-code tools, and embed AI natively across the full customer lifecycle.

During the briefing, Creatio shared key announcements and capabilities that define this agentic era:

1. Reduction of CRM Complexity and Democratization of Development

Creatio described their latest version as being purpose-built for businesses looking to streamline bloated CRM stacks and bring more development power directly into the hands of business users. Traditional CRM systems often require months of customization and dedicated IT resources, reflecting a skill set that is hard to find and expensive to pay for. By contrast, Creatio states that their no-code environment and built-in AI agents will simplify setup, customization, and adoption. Key highlights shared included:

▸ A no-code agent builder, allowing business users to design intelligent agents using drag-and-drop tools and natural language.

▸ Native support for building and extending CRM, workflows, dashboards, and agents without needing specific development teams.

▸ AI that is embedded natively across all data in the CRM and connected apps that can be accessed using a conversational UI from within Creatio CRM and no-code apps or embedded within productivity tools (e.g. Outlook and Teams in this release, but in the future including Zoom, Gmail, and others).

▸ A unified platform that spans CRM, process automation, and analytics, reducing the need for a disjointed tool set or difficult integrations.

2. Governance and Access Controls for Responsible AI

Creatio addressed enterprise concerns about AI governance, data access, and compliance with several important capabilities included in 8.3:

▸ AI agents inherit all platform-wide data permissions and access rules defined in Creatio's role-based access control model.

▸ Data privacy and security settings apply consistently to AI interactions, supporting compliance with regulations like GDPR.

▸ Built-in human-in-the-loop workflows allow users to review and approve AI-generated actions before they are executed.

▸ AI agents can be scoped to specific user roles or departments, which limits their reach and ensures proper oversight.

These features are reportedly designed to address common enterprise concerns around AI governance, offering controls that help manage risk, maintain data security, and align automation with organizational policies.

3. Dashboards & Analytics Personalized by AI

Creatio introduced the Dashboard Agent to simplify the creation of real-time analytics. Users can build personalized dashboards using natural language commands, removing the need for technical skills or third-party BI tools.

Key capabilities include:

▸ Automatically generated data visualizations that match brand guidelines and business intent.

▸ Interactive filters and widgets that allow users to slice by funnel stage, region, and product type.

▸ Personalized dashboards for individuals and teams, showing metrics relevant to their roles to help drive business outcomes.

- Mobile access and responsive layout for teams that prefer on-the-go insight over traditional large screens.

This approach is intended to streamline dashboard creation and analytics within the platform, aiming to provide users with easier access and performance insights, especially when compared to more complex or traditionally fragmented systems.

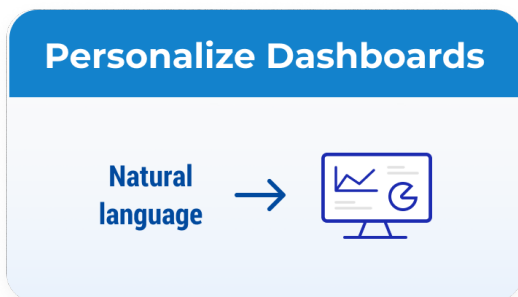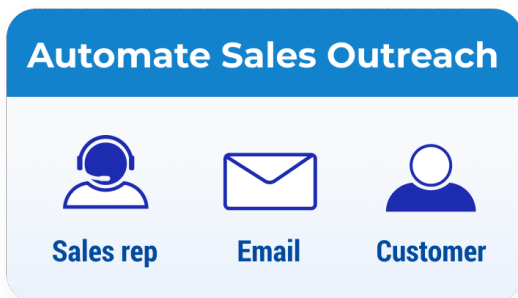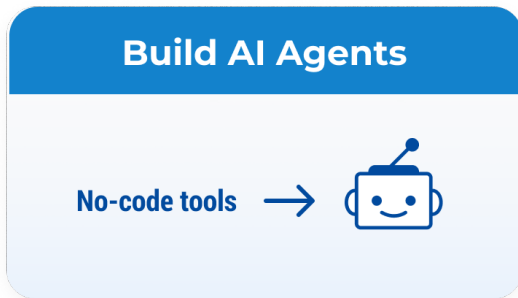## 4. Prebuilt and Customizable AI Agents for Sales, Marketing, and Service

The introduction of AI agents designed to support key business functions was well received by our analysts. While many CRMs still focus primarily on Sales, we see Creatio's ability to function across Marketing and Customer Service as a key differentiator. The AI agents act as digital coworkers that help carry out tasks across the entire customer lifecycle, from first touch to ongoing support.

Sales Agents

- Review RFPs, summarize requirements, and create opportunities with full document attachment.

- Enrich accounts using outside tools like Apollo and ZoomInfo.

- Recommend pricing based on historical trends and industry norms.

- Automatically create and send quotes, with human review and approval built into the process.

Marketing Agents

- Generate multilingual, on-brand campaign content based on event briefs or promotions.

- Adjust subject lines to increase email open and click rates.

- Assign leads to the most effective sales reps based on conversion likelihood.

- Analyze campaign performance and suggest optimization actions.

Build AI Agents

No-code tools →

Automate Sales Outreach

Sales rep **Email** **Customer**

Personalize Dashboards

Natural
language →

Service Agents

▸ Triage cases, draft replies, and escalate requests based on SLA timing or complexity.

▸ Pull knowledge base content and suggest articles to customers and agents.

▸ Update documentation after interactions to improve future support accuracy.

▸ Help with follow-up emails and service summaries.

All agents work within Creatio and third-party tools like Outlook or Teams, ensuring a continuous experience throughout a user's daily workflow – no need to copy and paste between applications.

Limitations and Considerations

Creatio's strategy is bold. The company competes directly with deeply entrenched platforms like Salesforce and Microsoft Dynamics, and overcoming these giants will require strong go-to-market leadership, sustained investment, and clear positioning. Some advanced AI capabilities, such as BYO LLM support (i.e. the "uberification" of LLMs) and deeper cross-channel orchestration, are still on the roadmap. Even so, Creatio's simplified pricing, inclusive AI access, and no-code-first design lower the barrier to experimentation and adoption for many teams, overcoming a major hurdle we continue to see in the market.

Our Take

Creatio's shift beyond basic content summarization (GPT-ification) and into full agentic CRM places it among the most forward-looking vendors in the market. The platform is no longer just a no-code tool or process engine. It is becoming a comprehensive business operations platform that combines CRM, workflow, AI, and analytics into a single, usable experience.

Too many CRM systems fail because they are too hard to use, too expensive to change, or too disconnected from the reality of customer engagement. Most vendors have simply bolted AI onto old frameworks. Creatio has done the harder job of building AI into the core platform, allowing digital agents to do more than assist – they execute, adapt, and improve.

We are especially interested in Creatio's marketing automation and dashboarding capabilities, which appear well positioned to support full-funnel revenue operations. These features give organizations the ability to engage customers across the entire journey, not just within a sales pipeline. As companies demand more value and integration from their CRM investments, this approach will become a key differentiator.

This strategy positions Creatio as an attractive alternative to other major CRM players in the mid-sized and enterprise teams that are looking for AI-native CRM platform solutions.