Creatio WIPFLI

FINSERV EDITION

THE STATE OF AI AGENTS & NO-CODE

Exclusive Insights from Leaders in the Financial Services Industry

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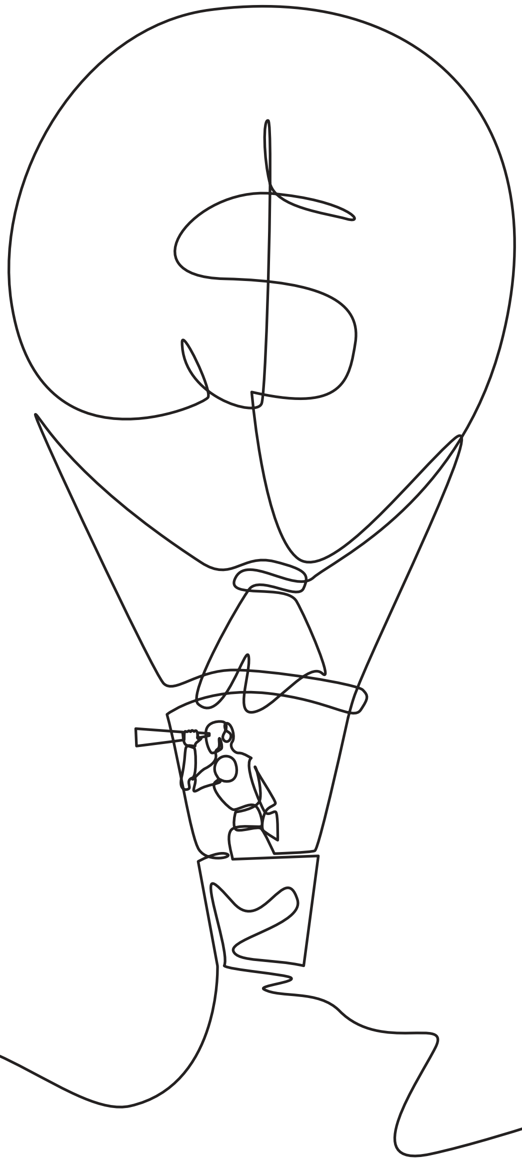


About the Financial Services Edition

This Financial Services Edition of The State of AI Agents & No-Code is based on findings from Creatio's AI Agent and No-Code Adoption Survey, 2025, conducted between May and August. The survey gathered 564 responses, including insights from over 100 business and technology decision-makers from the financial services industry at the director level and above, working in digital transformation, operations, and technology leadership roles.

This edition examines how leaders across banks and credit unions are approaching AI adoption with strategic discipline, balancing innovation with the governance, compliance, and security expectations that are unique to the industry. The report provides an industry-specific perspective on the opportunities, barriers, and emerging best practices, offering a clear picture of how AI agents and no-code technologies are reshaping the future of financial services.

FOREWORD BY WIPFLI

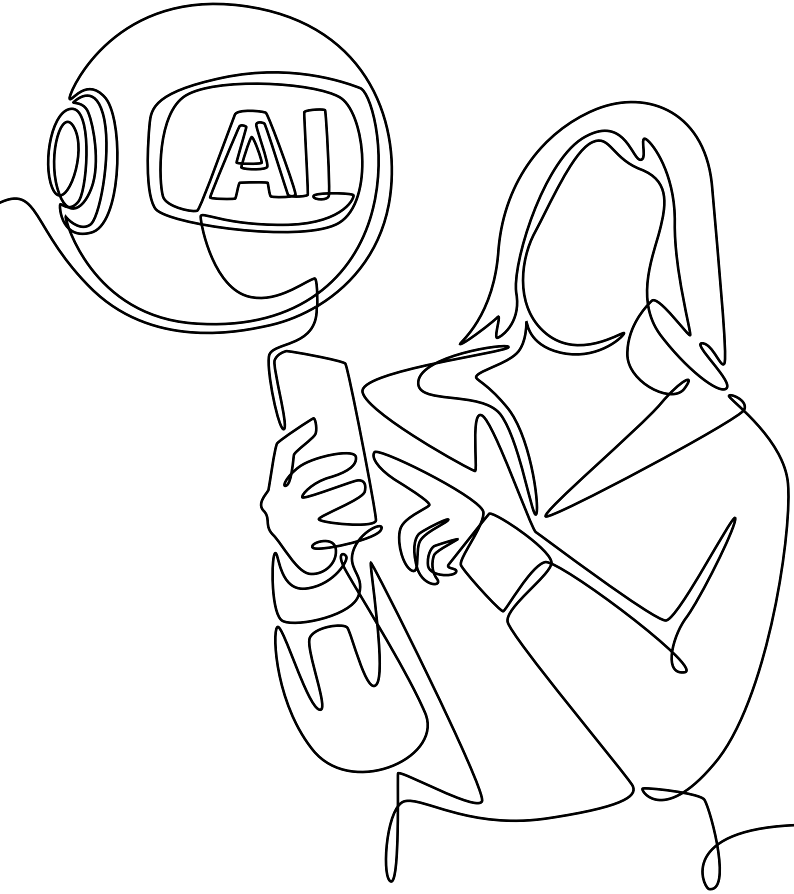
Financial services organizations need curiosity and clarity

The financial services industry is standing at the intersection of innovation and transformation. Artificial intelligence is no longer a distant concept – it's a defining force shaping how institutions serve clients, manage risk and compete in a digital-first economy.

The FinServ Edition of The State of AI Agents & No-Code reflects a shared commitment between Wipfli and Creatio to understand where institutions truly are on their AI journey – not just what's being imagined, but what's being implemented. Through these findings, we aim to bring clarity to the conversation: what's working, where challenges persist, and what leadership actions will determine who thrives in the years ahead.

Why You Should Read This Report

- AI maturity is accelerating – but unevenly. While most financial institutions have begun experimenting with AI, only a select few have operationalized it at scale. This report uncovers the critical factors separating early adopters from laggards.
- The talent and governance gap is real. Data readiness, risk management, and workforce skills emerged as top barriers – highlighting the need for boards and executives to lead with both vision and discipline.
- Transformation is about people, not just platforms. The survey findings reveal how successful institutions are aligning culture, strategy, and technology to responsibly unlock AI's potential.
- This is the roadmap forward. From generative and predictive models to process automation, the insights here illustrate where AI is delivering measurable business value – and where the next wave of innovation will take shape.



A Shared Commitment to the Future

At Wipfli, we believe transformation begins with understanding – knowing how to connect technology with human insight to create lasting impact.

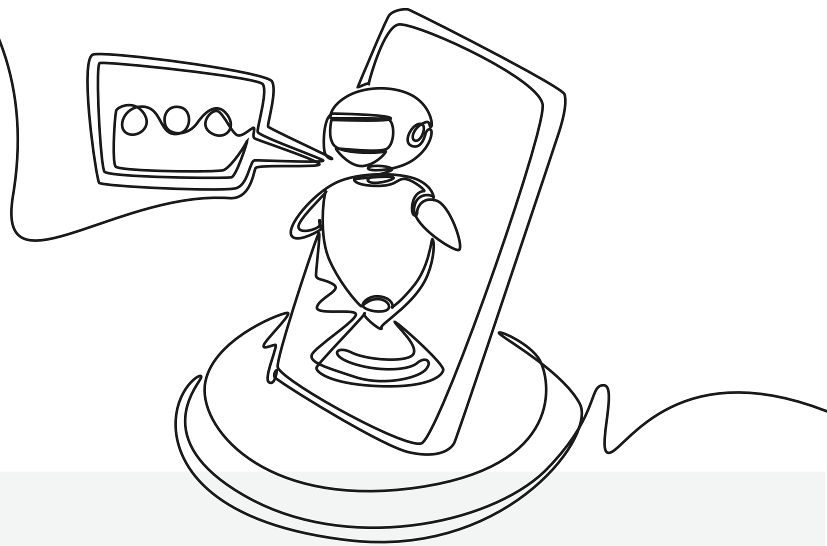
Together, with Creatio, we share a common goal: helping financial institutions embrace AI confidently, responsibly, and strategically – not as a trend, but as a foundation for growth.

We invite you to explore these results, challenge assumptions, and use the insights within to inform your next chapter of innovation.

Anna Kooi
Partner, Financial Services
Practice Leader, Wipfl

Key Themes From the Survey

Creatio's AI Agent and No-Code Adoption Survey, 2025 reveals three overarching key trends driving business transformation.



THEME #1:

AI Moves from Experiment to Executive Strategy

AI is shifting from experimental pilots to a strategic boardroom conversation. Leaders are beginning to view agentic AI as a lever for reimagining operations, driving efficiency, and unlocking new sources of growth. What was once a technology discussion is now becoming an important element of enterprise strategy.

THEME #2:

Deploying AI Agents To Reimagine Human Efforts, Not Replace Them

The most impactful AI works alongside humans as "twins" that free people up to focus on relationships, creativity, and innovation. From sales and service to field operations, AI is enabling human-AI collaboration at the point of interaction, delivering better, faster, and more personalized experiences.

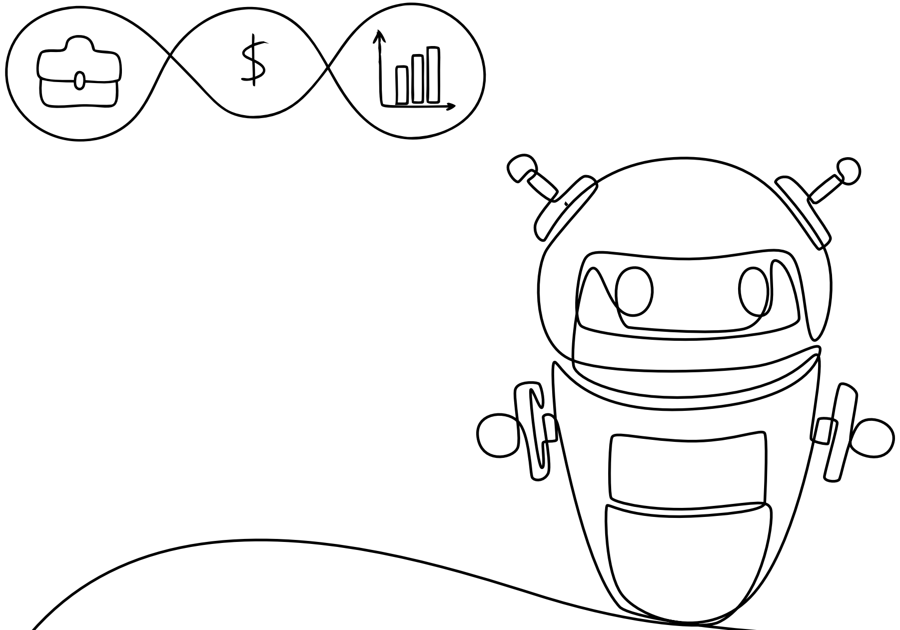
THEME #3:

Using No-Code With AI To Abstract Complexity and Adapt to the User

No-code tools powered by AI remove barriers by minimizing training and integration challenges. By adapting to how people naturally work, they turn complexity into simplicity – accelerating adoption and unlocking value without requiring deep technical expertise.

THEME #1

AI Moves from Experiment to Executive Strategy



AI agents represent a fundamental **shift from tactical automation to strategic business transformation** that redefines how organizations operate and compete.

Unlike traditional process automation that simply digitizes existing workflows, agentic AI creates autonomous systems capable of end-to-end decision-making, real-time adaptation, and continuous optimization.

Financial institutions are shifting toward an AI-enabled enterprise transformation

Creatio's AI Agent and No-Code Adoption Survey, 2025 shows that enterprises in the financial industry are transitioning from outdated, legacy workflow automation to modern, AI-driven process transformation. **While few have yet adopted a truly AI-first operating model, many are beginning to explore how AI agents can augment complex business processes, improve decision-making, and enable new cross-functional ways of working.**

This evolution marks a shift in mindset – from pursuing incremental efficiency gains to viewing AI agents as strategic enablers of growth and innovation. Rather than simply automating tasks, forward-thinking financial institutions are beginning to recognize the potential of AI to enhance customer experiences and open new business opportunities.

AI agents are also starting to enter boardroom discussions, reflecting growing executive awareness of their strategic importance. Their successful implementation, however, demands enterprise-wide coordination, clear governance, and C-level commitment to align resources and manage change effectively.

At the same time, organizations must acknowledge that AI initiatives built on legacy or non-AI-native infrastructure face significant challenges – from proving ROI to managing fragmented data and complex vendor ecosystems. Achieving true transformation will require executive-level vision, sustained investment, and a unified strategy to turn early experimentation into measurable enterprise impact.

> AI success isn't about racing to adopt new technology – it's about leading with purpose. Institutions that clearly define why they're pursuing AI will be the ones that turn experimentation into enterprise impact.

Anna Kooi
Partner, Financial Services Practice Leader, Wipfl

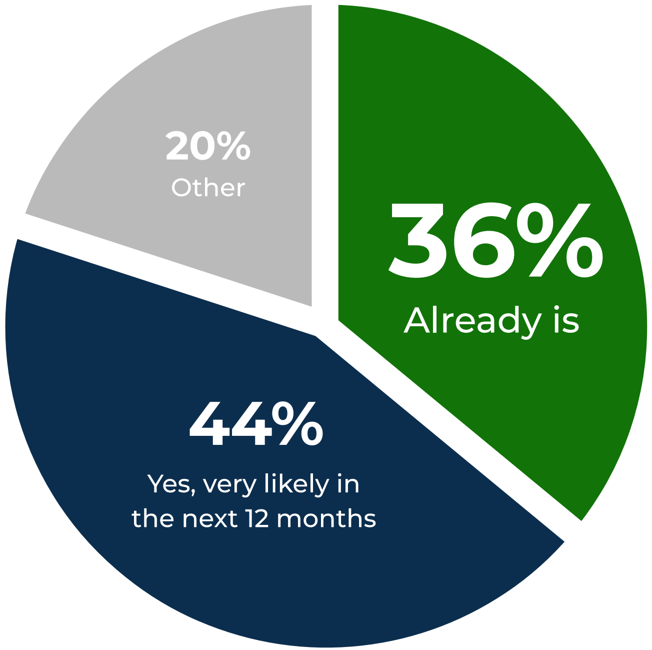
AI agents rise to the top of the boardroom agenda

AI has entered boardroom conversations, signaling growing executive readiness to shape its strategic role in the financial industry. Eighty-percent of business and technology decision-makers in financial services companies say AI agents are already a board-level topic (36%) or expect it to reach the boardroom in 2026 (44%).

Financial services organizations are more cautious than other industries (45% of leaders globally already identify it as a boardroom topic). But this measured approach reflects maturity, not hesitation. Financial institutions must balance innovation with strict regulatory, security, and compliance requirements, and their thoughtful pace underscores a customer-first orientation.

Rather than rushing toward adoption, financial leaders are laying the groundwork for responsible, enterprise-level AI integration, aligning future initiatives with long-term business objectives and clear value creation for customers.

Business and technology decision makers who say AI agents are already a board-level discussion topic



Base: 108 FinServ business and technology decision-makers.

Expert's Perspective

Financial institutions aren't necessarily moving slowly, they're moving deliberately. The conversations happening in the boardroom today reflect a recognition that AI isn't just a technology play; it's a strategic capability that must be implemented responsibly, with governance, security, and trust at its core.

Chris Jackson
Industry Marketing and Strategy Lead, FinServ, Creatio

Leaders in the financial industry are pursuing a strategic approach to building and using AI agents

In financial services, **AI agents are evolving** from emerging innovation to strategic priority.

Among leaders representing the financial services industry, 73% consider AI agents **critical (29%) or important (44%) to achieving their near-term goals,** together accounting for nearly three-quarters of respondents. This figure is slightly below the global average of 86%, indicating that while the sector recognizes AI's importance, it is adopting a somewhat more measured approach compared with other industries.

But just building or using AI agents isn't a strategy. Business leaders need to determine how AI agents will accomplish strategic goals like outpacing competitors, creating differentiation, and delivering remarkable customer experiences.

Leaders shouldn't limit their agentic AI strategy to the advantages AI agents can bring to their company's efficiency or productivity goals. Rather, leaders should start with the customer and work backward to design AI agents and skills that benefit the customer, the company, and employees.

Leaders also need to ensure that their big strategic ideas don't fall flat due to legacy platforms that layer AI on top of monolithic technology and rigid data architectures. AI must be built-in to the strategy and the technology that executes the strategy from the ground up.

73%

of leaders believe AI agents will be critical or strategically important in the next two to three years.

Base: 108 FinServ business and technology decision-makers.

Leaders across most industries believe AI agents will help them achieve their business goals

The connection between AI agents and business objectives is now widely recognized across most industries.

While technology and manufacturing leaders are moving fastest, with 83% viewing AI agents as critical or important to achieving their goals in the next 2–3 years, the financial sector follows closely at 73%.

In these sectors, leaders are moving beyond experimentation and starting to view AI agents as strategic enablers of growth, efficiency, and innovation. In financial services, however, stricter governance, regulatory, and legal frameworks naturally drive a more measured path toward AI integration, ensuring progress is both sustainable and compliant.

By contrast, industries such as professional services are progressing more cautiously, with fewer leaders viewing AI agents as essential to near-term business success.

Business and technology leaders who say AI agents will be critical or important to their organization's goals in the next 2-3 years

Base: 108 FinServ business and technology decision-makers, Technology 115 business technology decision-makers, Professional Services 54 business and technology decision-makers, Manufacturing 65 business and technology decision-makers, Other 222 business and technology decision-makers.

THEME #2

Deploying AI Agents to Reimagine Human Efforts, Not Replace Them

The real story of AI in the workplace is not replacement, it is reinvention. Creatio's Global AI and No-Code Survey, 2025 confirms a prevailing belief that **AI agents will augment rather than replace human teams.**

This fact reflects a strategic understanding that AI agents will reshape work toward higher-value activities requiring emotional intelligence, complex problem-solving, and strategic thinking that AI cannot replicate.

Most business leaders want to combine the power of people and AI to achieve better customer relationships

Creatio's AI Agent and No-Code Adoption Survey, 2025, shows that enterprises in the financial services industry are aiming to forge symbiotic relationships between people and AI agents. Together, they will deliver value at a scale neither could achieve alone. Organizations that embrace this reality will not just see productivity gains, but will unlock entirely new ways of empowering employees, creating growth opportunities, and building stronger customer relationships.

The survey found that business and technology decision-makers are **prioritizing deployment in customer-facing functions** like service, sales, and marketing because these areas offer the highest-impact opportunities for combined AI and human revenue generation, customer experience differentiation, and measurable ROI.

This strategic positioning requires **executive leadership to orchestrate enterprise-wide coordination, resource allocation, and organizational transformation** that extends far beyond departmental pilot projects to create sustained competitive moats through intelligent human-AI agent orchestration and innovation.

Unlike traditional IT automation that simply improves backend efficiency, AI agents that augment customer-facing roles **directly influence business outcomes** by enabling people to focus more on relationships, enhanced customer empathy, and personalized experiences.

Better decisions. Faster service. Deeper relationships. Those have all been buzzwords – until now. AI agents and no-code have the potential to make these real – and make customers and employees really happy.

Kyle Aulerich
Partner, Wipfli

Most leaders expect AI agents to augment not replace headcounts

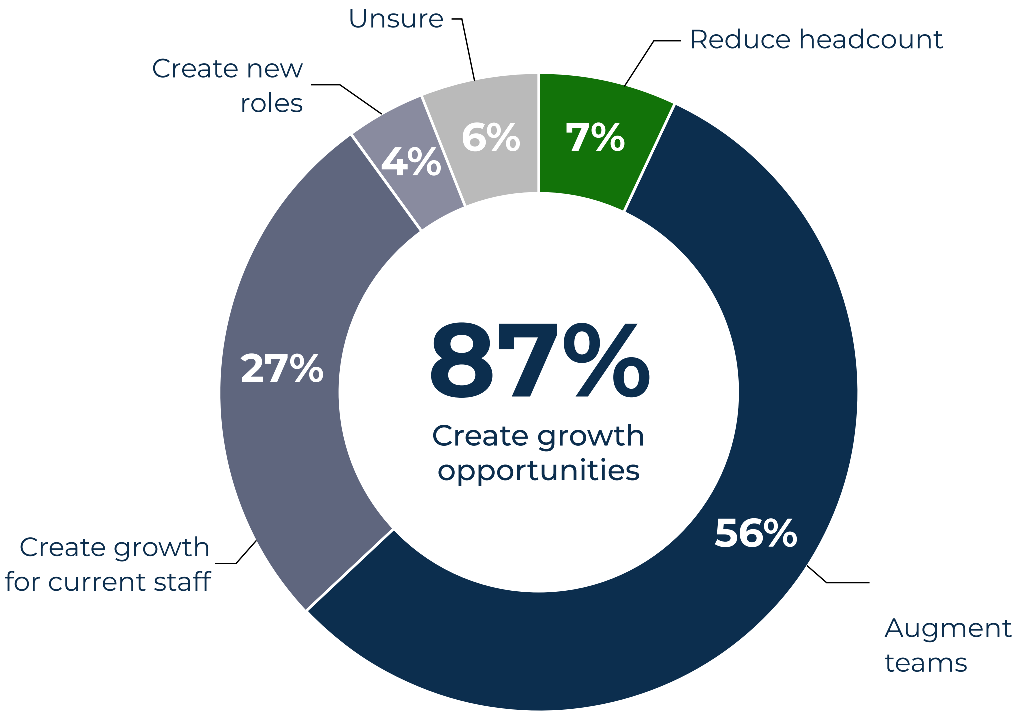
Only 7% of business and technology decision makers in the financial industry foresee significant headcount reductions due to AI agents.
The majority (87%) say AI agents will augment teams to drive productivity, create growth opportunities for current staff, or create new roles within the organization.

More than half (56%) of respondents expect AI agents to augment staff to drive productivity and develop meaningful connections with clients. The aim is not to replace experts but to give them more time for higher-value activities such as advisory and relationship management.

AI agent augmentation must connect back to the company strategy: If agents free up time, teams must either increase their workloads or find higher value tasks.

This will ultimately reshape the way upskilling needs to happen. Workers must become super-productive and know how to manage ever increasing levels of output. They must move away from being specialists and become generalists who can manage a broader set of business disciplines. And they must become more strategic so they can make smarter decisions that get executed somewhat autonomously while also having more impact on larger areas of the business.

Main Role Decision Makers Expect AI Agents To Play

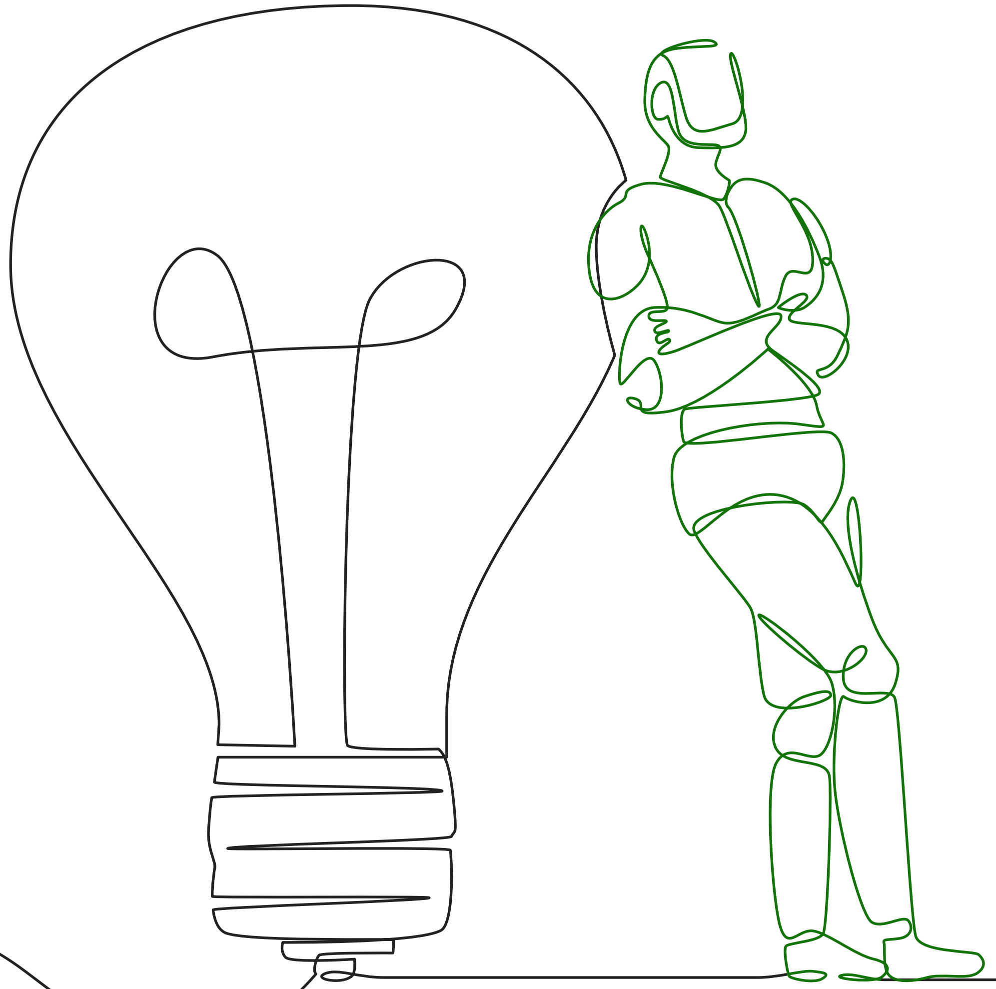


Base: 108 FinServ business and technology decision-makers.

Practitioner's Perspective

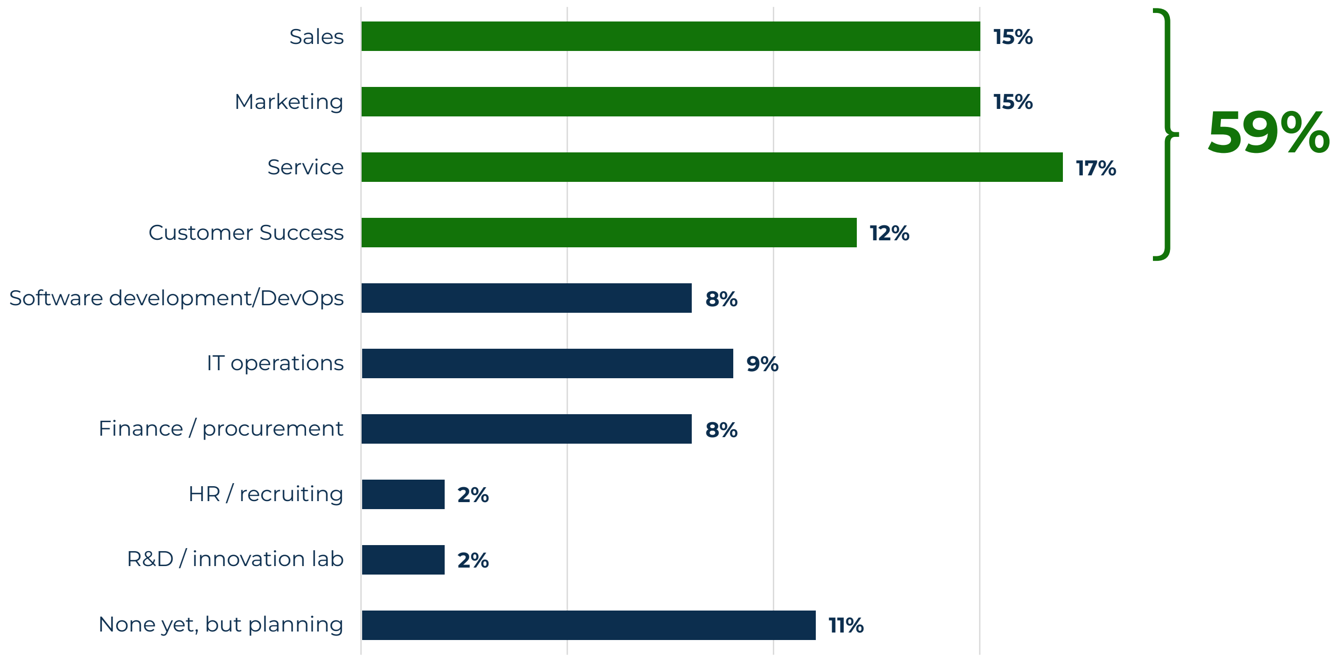
Knowing more about members and having easy access to that demographic information – particularly as we move toward more AI-generated capabilities in the platform – and understanding their preferences and how they engage with us, informs how we build out certain processes, products, and services going forward.

Wendy Albers
SVP of Member Experience,
Generations Federal Credit Union



FinServ leaders prioritize AI investment in customer-facing functions

Where leaders are currently exploring or deploying AI agents



Base: 108 FinServ business and technology decision-makers.

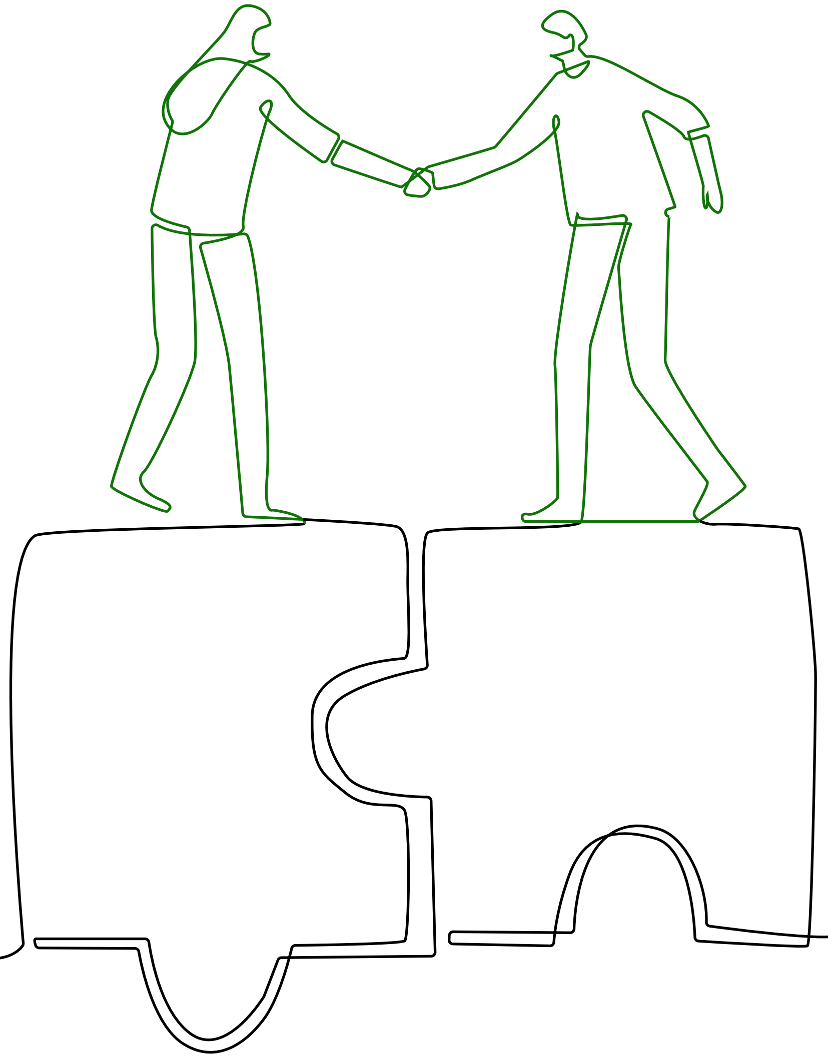
AI agents are increasingly being deployed in **frontline, growth-oriented functions,** where they can directly impact the customer experience and revenue. Creatio's survey reveals that business and technology leaders in the financial industry are prioritizing **Service (17%), Sales (15%), Marketing (15%),** and **Customer Success (12%)** as the top areas for AI agent implementation.

However, as automation takes over more interactions, human connection becomes the competitive differentiator. In financial services, where trust and personalization are paramount, AI's role is shifting from simply automating tasks to enhancing relationships as consumers today expect every interaction to feel tailored – not simply fast or efficient, but relevant and empathetic.

Expert’s Perspective

AI isn’t changing what makes financial services special – it’s amplifying it. Trust and human connection are still the foundation. AI helps organizations deliver them faster and at scale.

Anna Kooi
Partner, Financial Services
Practice Leader, Wipfl



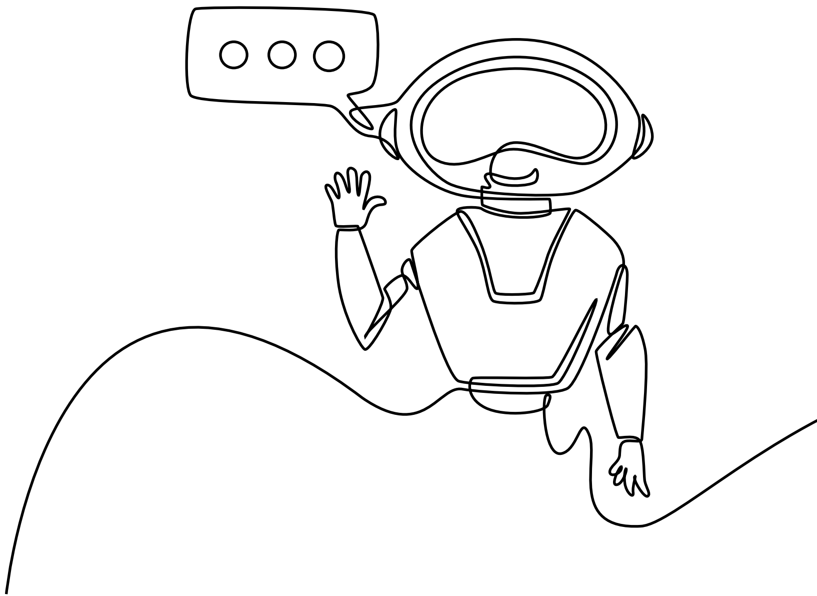
From automation to collaboration: the new era agentic CRMs

This evolution underscores the growing importance of implementing AI agents within the CRM ecosystem. Unlike traditional automation that operates in the background, AI agents in the agentic CRM collaborate directly with people – learning, adapting, and acting in real time to support day-to-day operations.

While AI agents manage routine tasks, analyze customer behavior in real time, and surface actionable insights, people can focus on what truly drives value in the financial industry: building deeper, trust-based relationships.

Success depends on blending people and AI to create unified, intelligent workflows that strengthen compliance and improve customer experiences. The winning formula isn't AI instead of people but AI with people.

In this new frontier, humans and AI agents work together, delivering personalized, scalable experiences that reflect the best of both worlds – efficiency and human touch. Financial institutions that adopt agentic CRMs and master this collaboration will not only operate smarter but compete on a entirely new level.



> A CRM platform that's not connected to the technology stack is a disadvantage. A CRM platform that's not connected to the customer experience is disastrous.

John Arnold
Head of Strategic CRM Advisory, Creatio

The Future of AI Agents in the Financial Services Industry

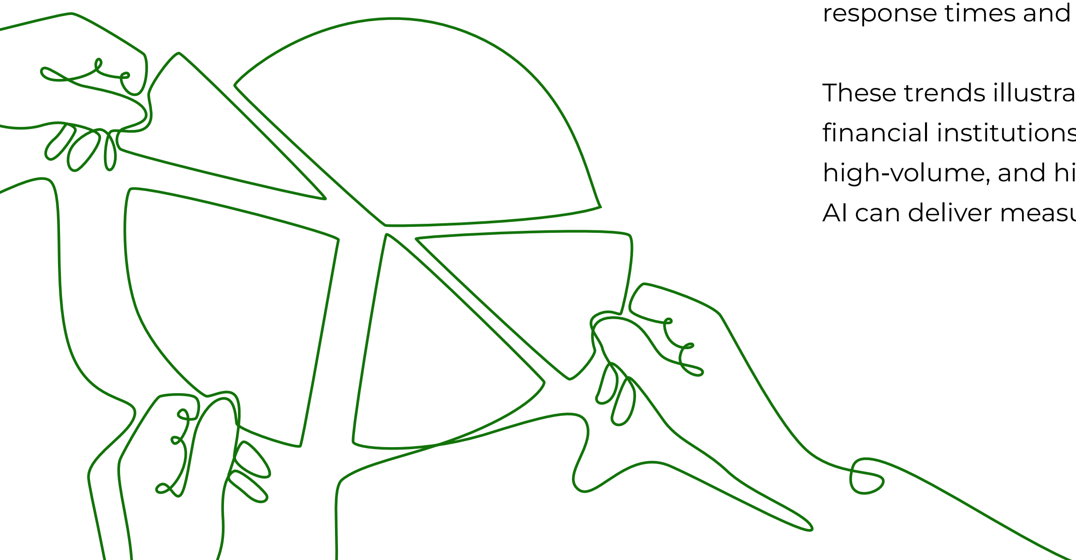
Financial services leaders have clear priorities when it comes to the future deployment of AI agents in their organizations.

Administrative and operational workflows (33 %) top the list as these are the areas where automation can reduce manual workloads, increase accuracy, and streamline compliance-heavy processes.

Following closely are sales and lead management (24 %), where AI enhances customer engagement, **and specialized sector workflows (22 %)** like underwriting, claims, and risk management – key areas where intelligent agents can unlock domain- specific efficiency gains.

Finally, **customer service and case management (18 %)** remain a consistent area for AI augmentation, particularly in improving response times and personalization.

These trends illustrate a pragmatic approach: financial institutions are prioritizing structured, high-volume, and high-impact processes where AI can deliver measurable value.



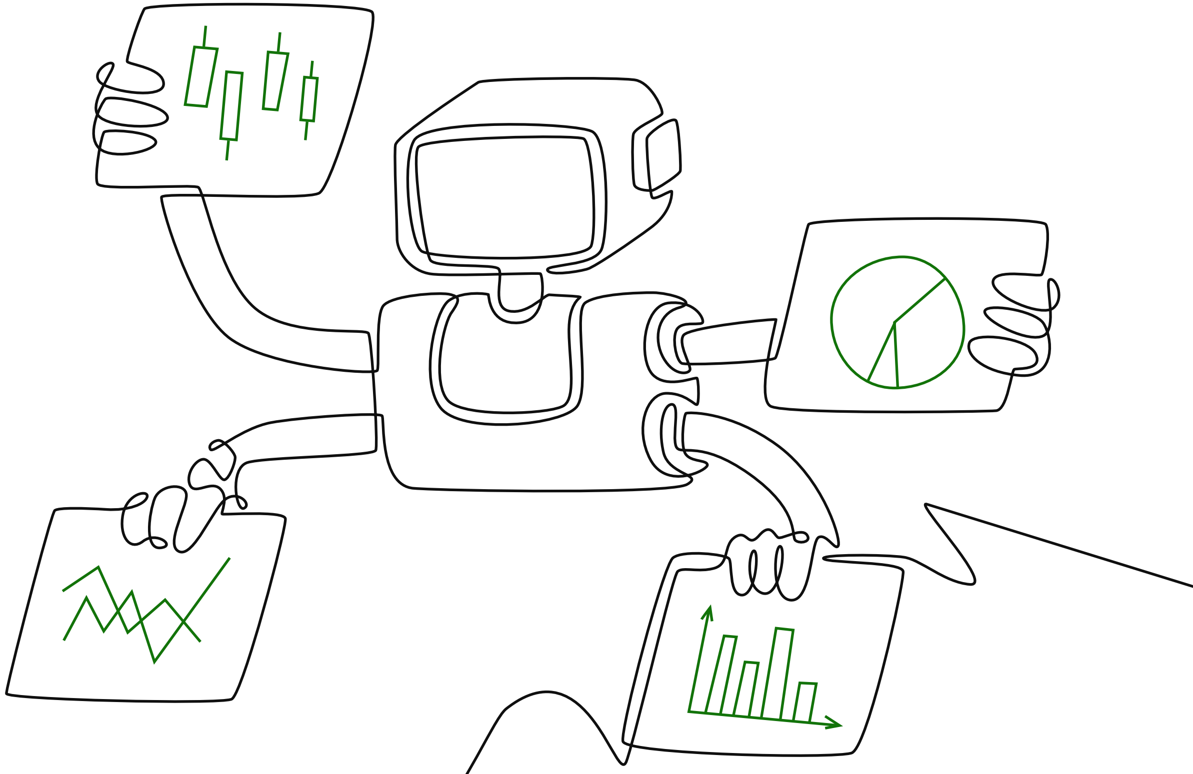
Financial leaders understand that meaningful AI adoption starts where the impact is clear. Streamlining operations, increasing accuracy, and enhancing decision-making are the steppingstones to an AI-driven enterprise, followed closely by more hyper-personalized customer engagement and tailored experiences.

Chris Jackson
Industry Marketing and Strategy Lead, FinServ, Creatio

Practitioner's Perspective

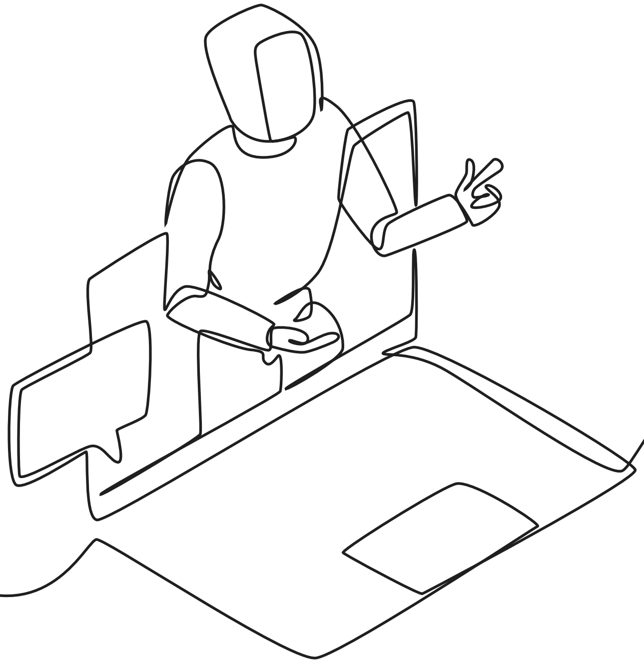
Cape & Coast Bank is focused on combining the power of technology with the personal relationships that define community banking. We plan to leverage generative and agentic AI to build on these gains – streamlining operations, amplifying decision-making, and enabling our people to focus their skills on customer relationships and strategic growth.

Kenny Tingle
First VP, Business Intelligence Manager,
Cape & Coast Bank



THEME #3

Using No-Code With AI to Abstract Complexity and Adapt to the User



No-code development involving frontline businesspeople fundamentally reverses the traditional technology adoption paradigm **by adapting to the user instead of requiring users to master complex technical skills** or translate their intentions into technical speak for IT professionals.

Wherever business users can create applications through natural language, visual modeling, and drag-and-drop interfaces, the combination of AI and no-code abstracts away underlying complexity by providing pre-built components, automated governance, and intelligent workflows that handle security, integration, and compliance automatically.

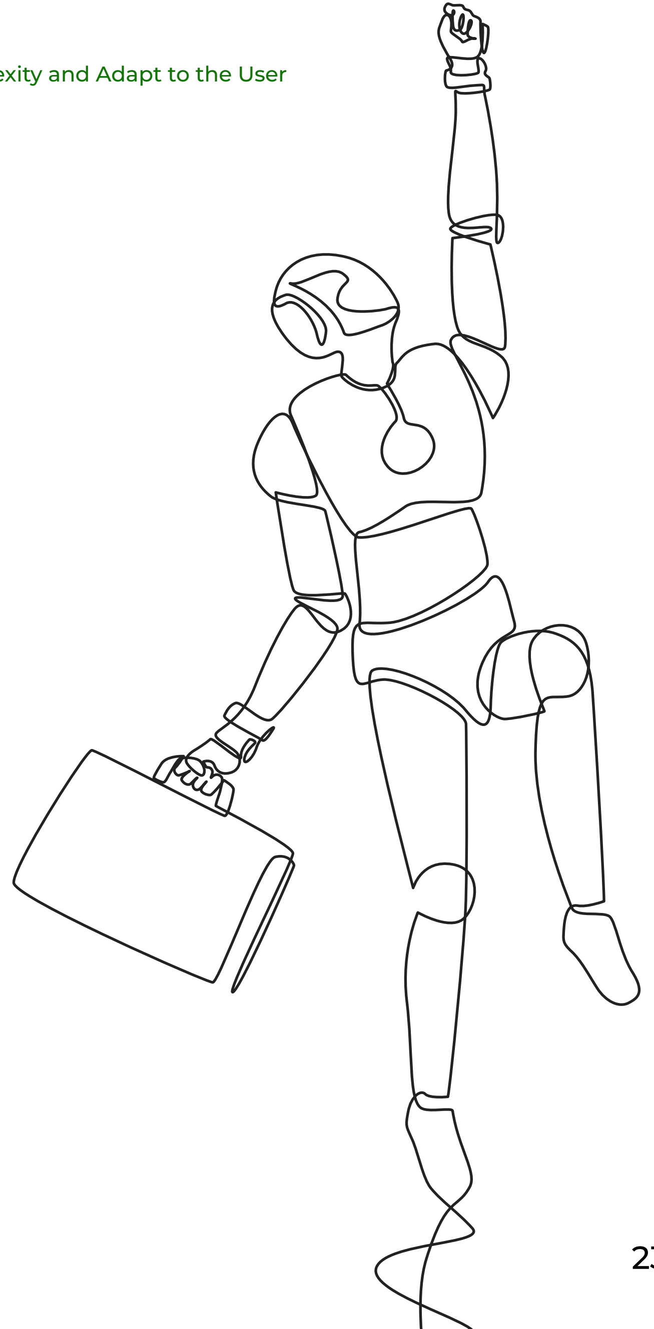
Leaders show confidence in using AI and no-code together to build AI-enabled solutions and overcome adoption barriers

Creatio's Global AI and No-Code Adoption Survey, 2025 shows that leaders are gaining confidence in leveraging no-code platforms to shift from development as a technical act to one of expressing business intent and validating results.

While organizations see a range of **adoption barriers** including **data quality issues, system integration challenges, regulatory concerns, and skills gaps,** leaders must shed their former platform thinking and look to the new era to overcome these challenges: No-code development and AI-native architectures **can democratize technology innovation and optimization.**

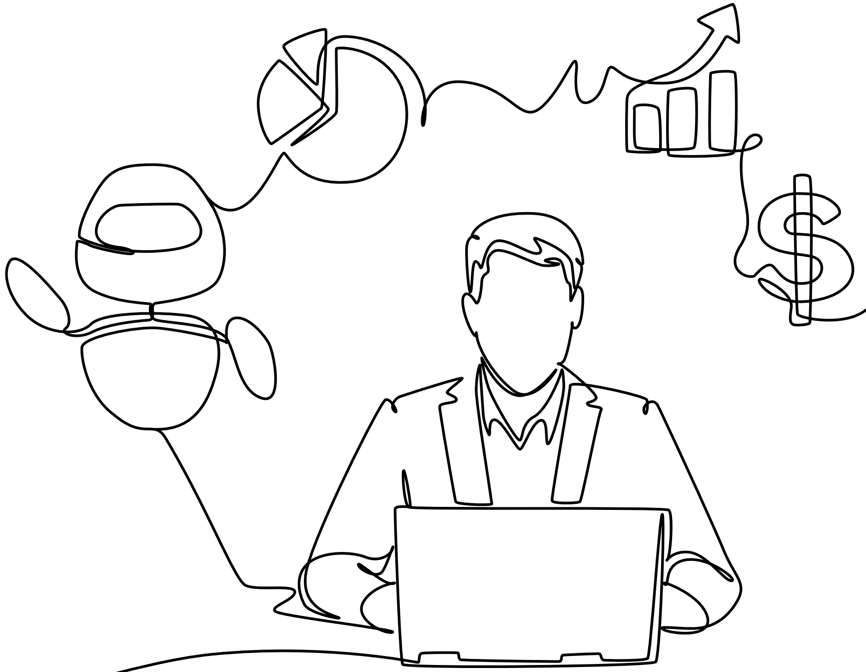
By leveraging no-code platforms that provide frictionless governance and security by default, companies can **transform traditional barriers into enablement opportunities,** allowing business users to create and deploy AI agents within well-governed frameworks rather than relying solely on technical experts or platforms with AI piled on top of legacy architectures.

The survey shows that companies are looking ahead to using no-code platforms to build AI-enabled solutions and agents because this approach represents the convergence of democratized devel opment with transformational AI capabilities that can deliver competitive advantages at unprecedented speed and scale.



Automating operational workflows and customer-facing workflows represent the most powerful use cases for no-code development because these areas directly impact both cost optimization and revenue generation while offering clear, measurable business outcomes.

The ability to rapidly create, modify, and optimize these workflows through no-code platforms means businesses can respond quickly to changing customer expectations and market conditions while continuously improving their operational efficiency and customer engagement strategies.



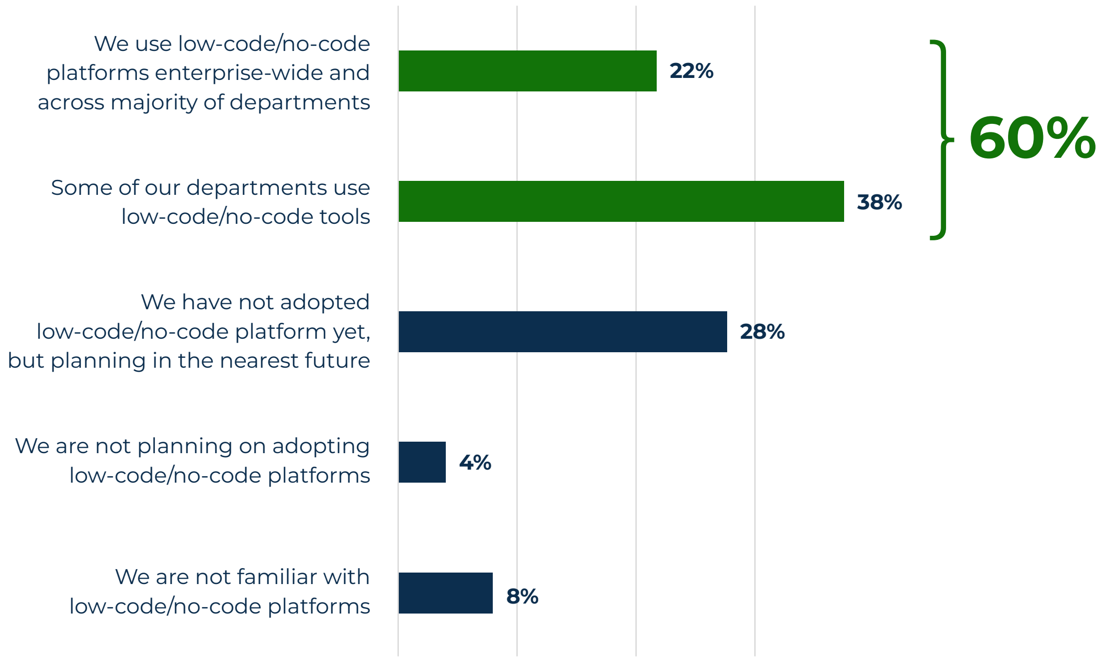
87%

of leaders say they are very or somewhat confident in starting to use low-code/no-code to build AI-enabled solutions and agents as they look ahead to the next 12–18 months.

Base: 108 FinServ business and technology decision-makers.

No-code development is becoming a mainstream business capability in the FinServ industry

Current Penetration Of Low-Code/No-Code In Organizations



Base: 108 FinServ business and technology decision-makers.

Sixty percent of business and technology decision-makers have already adopted low-code/no-code platforms enterprise-wide (22 %) or across some of their departments (38 %).

> This confirms that no-code development has moved beyond early adoption and is now an important capability in many modern enterprises.

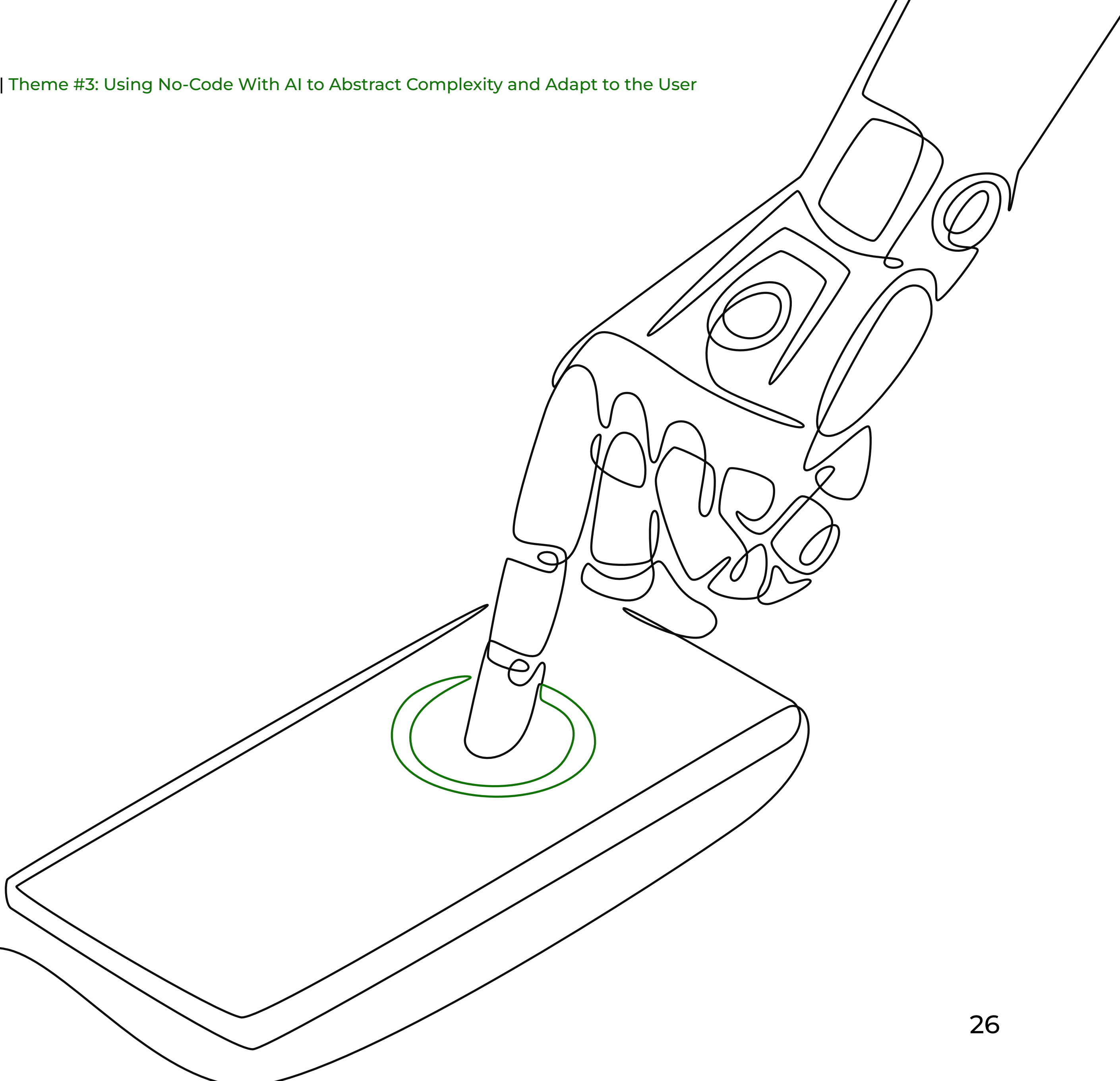
No-code development is an important skill: It's as important for people in an organization to know how to use no-code capabilities as it is to know email, spreadsheets, virtual meeting technology, and other systems.

But unlike learning to use legacy productivity tools, users don't need to understand the underlying no-code technology because AI technology can understand the users. That doesn't mean there isn't a learning curve. It just means the learning curve is shorter and less dependent on learning highly technical skills that are completely unrelated to a person's job role and skills.

Practitioner’s Perspective

Bringing all of those different types of AI into one platform really eases the transition — from using an agent workflow when it’s contextually relevant to relying on predictive modeling as users enter data into the system.

Matt Pincoski
Sr. Director of System Engagement,
Ent Credit Union



The barriers to AI agent adoption are not roadblocks, they are opportunities for business progress and innovation

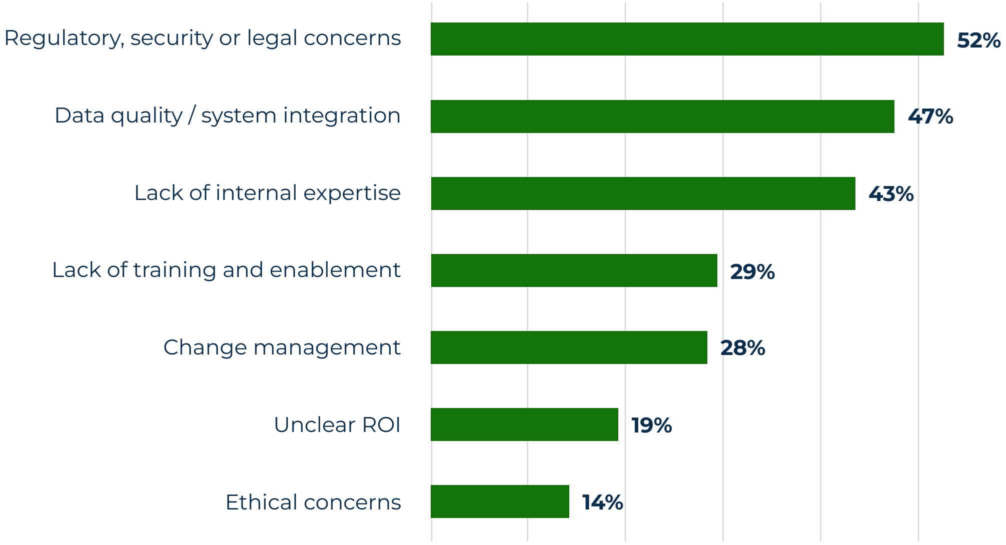
When it comes to adopting AI agents in financial services, **regulatory, security, and legal concerns (52 %)** remain the top challenge. Given the industry's heavy compliance obligations and risk management standards, ensuring AI systems operate within strict regulatory frameworks is a primary obstacle to scaling adoption (compared to 43 % in other industries).

Closely following are issues around **data quality and system integration (47 %)** – a reflection of the complex legacy infrastructures and fragmented data environments that banks, credit unions, and investment firms struggle with.

To overcome this challenge, **decision-makers need to move to more flexible datamodels.** It's important to avoid getting lockedinto a non-portable data situation (i.e.,Microsoft's closed ecosystem or Salesforce'sdependency on AWS that forces users into its usage). Instead, choose systems that can easily centralize data, integrate with iPaaS, or easily connect and reconnect to data sources when they need to be changed.

The **lack of internal expertise (43 %)** also poses a significant barrier. Many financial organizations still face a shortage of specialized talent capable of implementing, governing, and maintaining AI solutions in a highly regulated environment.

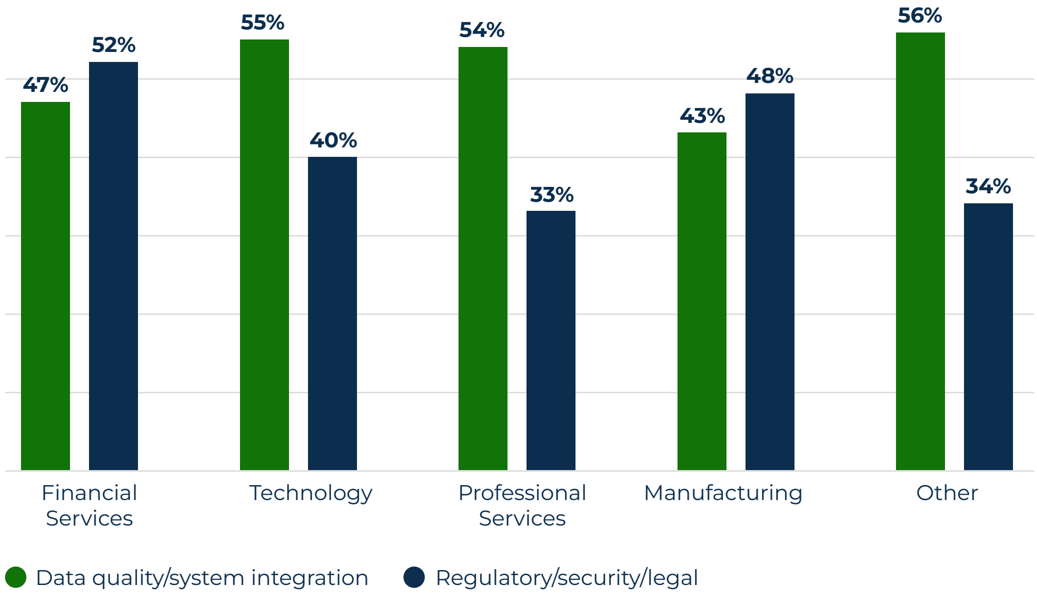
Likely barriers to broader adoption of AI agents in your organization



Base: 108 FinServ business and technology decision-makers.

Key barriers to AI agent adoption differ across industries but everyone has the same no-code opportunities

Key barriers to broader adoption of AI agents that can be turned into opportunities with no-code + AI



Financial services is among the industries where business and technology decision-makers are most likely to cite regulatory, security, or legal barriers to AI adoption (52 %), closely followed by manufacturing (48 %).

Conversely, both industries are least likely to identify data quality or system integration as significant obstacles – 47 % in financial services and 43 % in manufacturing, compared with 55 % in technology and 54 % in professional services.

This suggests that while governance and compliance remain top concerns, these sectors have made notable progress in data and system readiness relative to others.

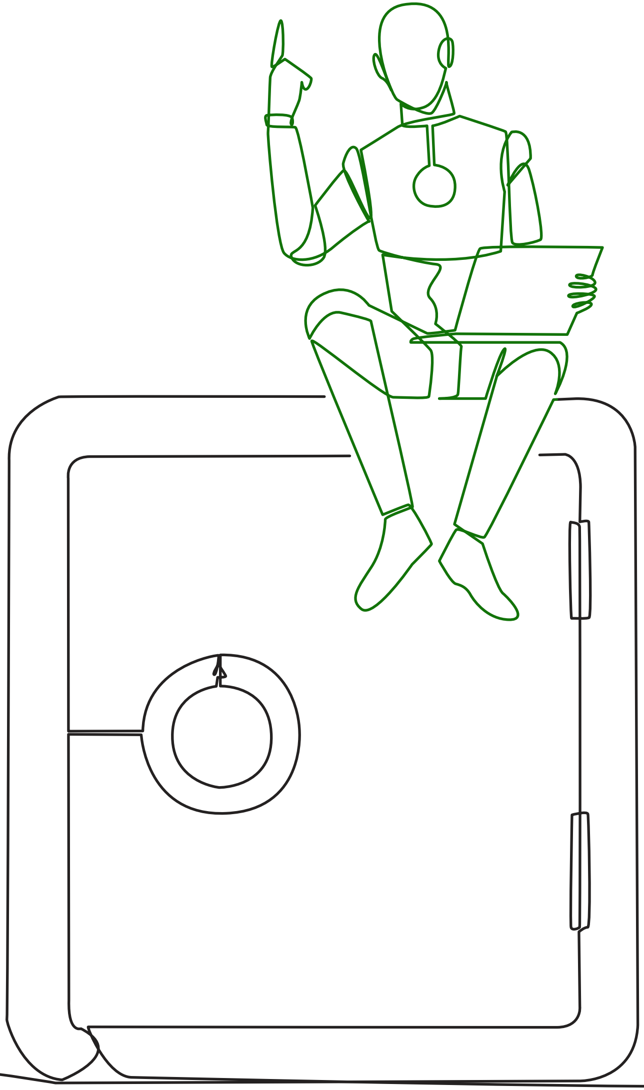
While every industry presents a different mix of barriers to AI agent adoption, leaders must rethink these traditional barriers to technology adoption: Data quality, system integration, and compliance are not barriers to AI and no-code adoption, they are challenges that AI and no-code can help solve by being deployed.

Base: Financial services 108 global business and technology decision-makers, Technology 115 business technology decision-makers, Professional Services 54 business and technology decision-makers, Manufacturing 65 business and technology decision-makers, Other 222 business and technology decision-makers.

Expert's Perspective

Challenges with AI adoption in financial services comes from two general areas: data availability and trust. Both of these can be overcome by understanding the data structure needed for an effective solution, and how/when when it will be used. Once we understand the how and why, our trust in the solution grows, allowing for additional use cases that span and benefit a broader area of the business.

Chris Jackson
Industry Marketing and Strategy Lead,
FinServ, Creatio



FinServ leaders embrace no-code and AI agents to build and customize applications

A growing number of financial institutions are moving beyond traditional development toward low-code and no-code approaches to accelerate AI innovation. According to Creatio's AI Agent and No-Code Adoption Survey, 2025, nearly 90 % of of business and technology leaders say they are confident or somewhat confident that their organizations will begin using low-code or no-code tools to build AI-enabled solutions and agents within the next 12–18 months. While some large enterprises still depend heavily on traditional coding models, the overall trend signals a strong shift toward democratized development, where business teams can actively participate in creating and refining AI solutions. This transition is helping financial institutions shorten time-to-value and reduce technical bottlenecks.

As you look ahead to the next 12–18 months, how likely is it that you will start using low-code/no-code to build AI-enabled solutions and Agents?

Base: 108 FinServ business and technology decision-makers.

Leaders are prioritizing operational and customer-facing workflow use cases with no-code

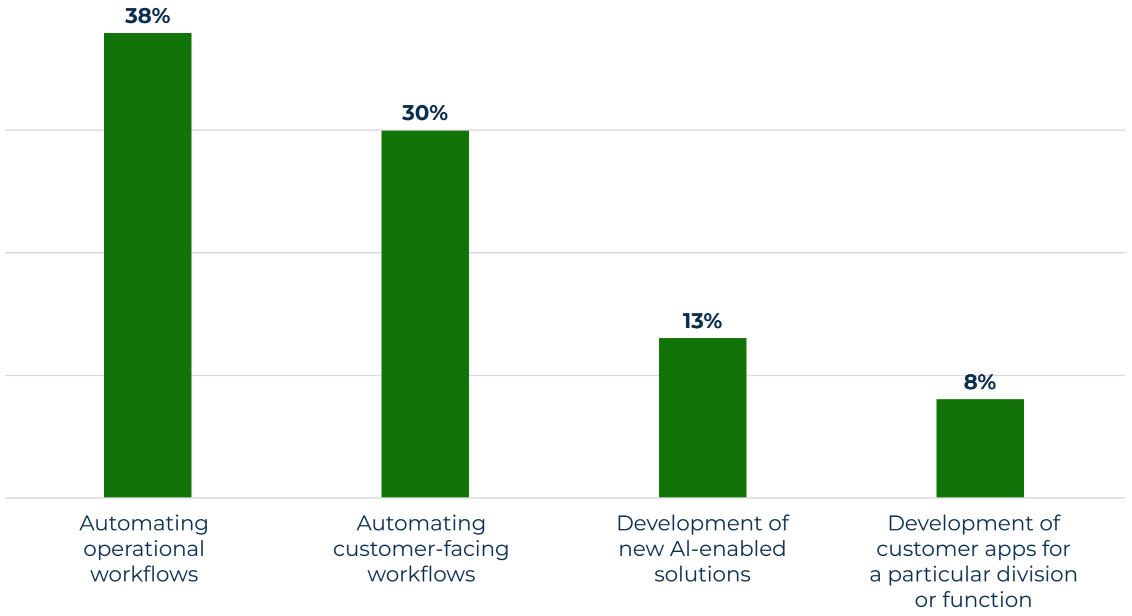
Automating operational workflows (38 %) and customer-facing workflows (30 %) represent the most frequently cited primary areas for no-code development because these areas directly impact costs and revenue generation while offering clear, measurable business outcomes.

These use cases are focused on areas of the business where no-code platforms can eliminate manual processes, reduce response times, and improve consistency without requiring technical expertise.

No-code automation is also enabling some financial organizations to innovate by developing new AI-enabled solutions (13 %) and customer apps for a particular division or function (8 %).

Leaders should formalize their no-code innovation efforts so they can increase their potential and ability to continue growing the business as technology rapidly advances.

Primary area where low-code/no-code is being used in organizations today



Base: 108 FinServ business and technology decision-makers.

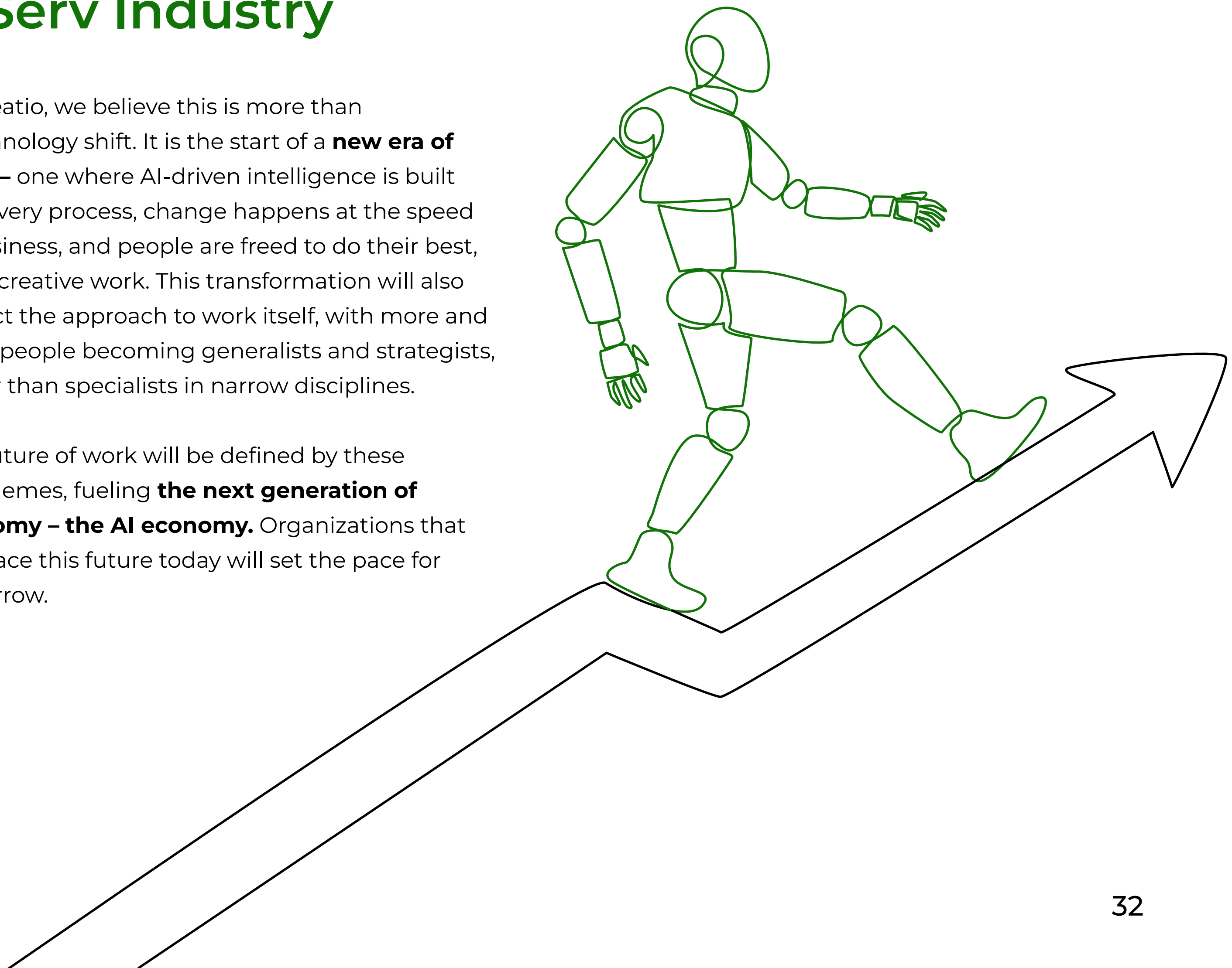
The Future of AI in the FinServ Industry

The survey's findings make one truth undeniable: **AI is now central to business strategy in many forward-thinking organizations.** No longer experimental technology, it is shaping the way organizations will compete, innovate, and transform. Yet the real story isn't about machines replacing people. Leaders see AI as a force for **augmentation, not substitution –** a digital teammate that relieves humans from repetitive, low-value work and empowers them to focus on what only humans can do: nurture relationships, imagine new possibilities, and lead change.

The findings also point to a clear path forward. **AI-native, no-code platforms** are emerging as the most effective way to scale adoption, break down barriers, and embed intelligence directly into business workflows. This approach democratizes innovation, ensuring that every team, not just IT, can participate in shaping the AI-powered transformation.

At Creatio, we believe this is more than a technology shift. It is the start of a **new era of work –** one where AI-driven intelligence is built into every process, change happens at the speed of business, and people are freed to do their best, most creative work. This transformation will also impact the approach to work itself, with more and more people becoming generalists and strategists, rather than specialists in narrow disciplines.

The future of work will be defined by these key themes, fueling **the next generation of economy – the AI economy.** Organizations that embrace this future today will set the pace for tomorrow.



AFTERWORD BY CREATIO

People won’t need to learn how AI works because AI learns how people work

Burley Kawasaki
Global VP, Product Marketing,
Creatio

John Arnold
Head of Strategic CRM Advisory,
Creatio

Enterprise technology once forced people to adapt to rigid systems and processes.

Today, that model is flipping. **Agentic AI is adapting to the way people and businesses work,** integrating seamlessly into workflows, and evolving in real time with customer and market needs.

This shift isn’t about disruption or steep learning curves; it’s about reducing friction, enabling faster outcomes, and making technology feel almost invisible in the flow of work.

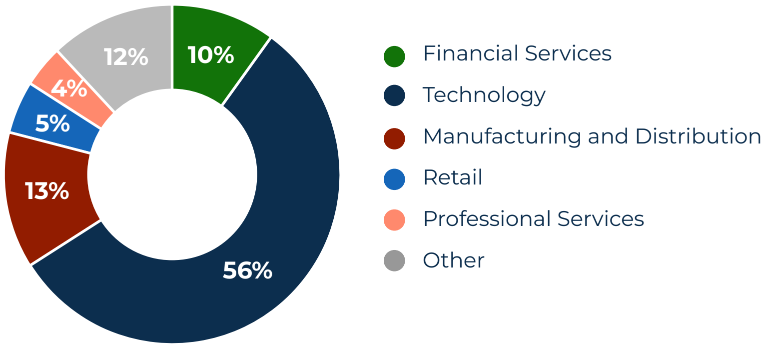
About Creatio's AI & No-Code Adoption Survey, 2025

Creatio's AI Agent and No-Code Adoption Survey, 2025 was fielded between May and August and garnered 564 responses, with 108 from FinServ business and technology decision-makers, director-level and above in digital transformation, operations, and technology. Participants were not offered any incentives in exchange for completing the survey.

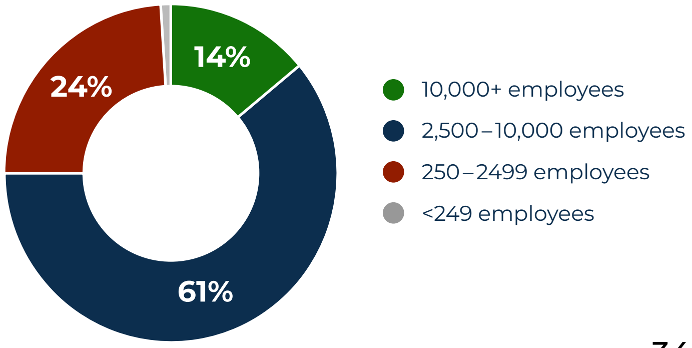
108

FinServ business and technology decision-makers director level and above

10+ Industries



Company Size



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Wipfli is a leading national advisory and accounting firm with nearly 100 years of serving ambitious middle-market organizations. We understand our clients' unique challenges and help them succeed on their terms through assurance, tax, advisory, outsourcing and technology services. With 3,000+ associates and global alliances, we combine national capabilities with local relationships.

Wipfli operates under an alternative practice structure: Wipfli LLP, a licensed CPA firm, provides attest services, while Wipfli Advisory LLC, a non-CPA firm, delivers business advisory and non-attest services.

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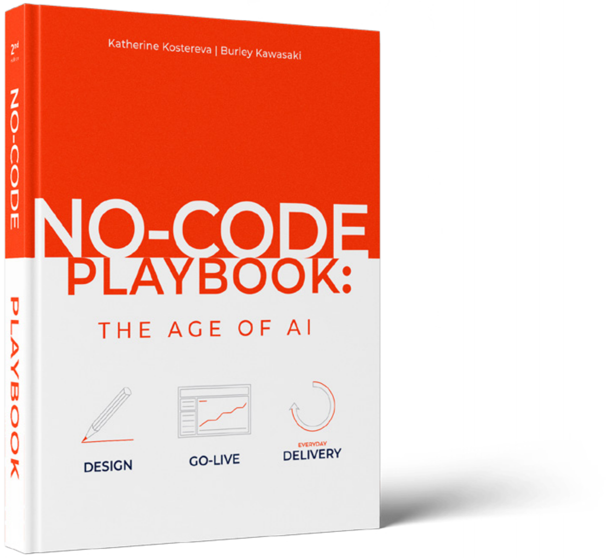
About Creatio

Creatio is a global vendor of an agentic CRM & workflow platform with no-code and AI at its core. We help organisations automate customer and operational workflows achieving the fastest time-to-value and the highest ROI on the market. Millions of workflows run on Creatio daily, supporting thousands of clients in over 100 countries. Genuine care for our clients and partners is at the heart of our DNA.

Let’s talk about accelerating your AI-powered digital transformation

Get in Touch

Get a Free Demo



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