



CASE STUDY

GreenState Credit Union

# Transforming Onboarding and Employee Services with Self-Service Automation



## EXECUTIVE SUMMARY

As one of the Midwest's fastest-growing credit unions, GreenState Credit Union looked at facing significant operational challenges while scaling from 200 to nearly 900 employees and growing to \$12 billion in assets in a short amount of time. Their employee lifecycle management processes, built on disconnected systems and manual workflows, were creating mounting inefficiencies that threatened to impact their award-winning service levels.

By implementing Kinetic Data's experience-first platform, GreenState transformed their internal operations through automated system access management, template-based role provisioning, and streamlined coordination between departments. The solution established a foundation for continuous innovation while protecting their existing technology investments.

*“When we first started looking at Kinetic, we were searching for a front-end solution for our IT self-service portal... but as we learned more, we realized it could be so much more—it wasn't just about IT requests; it could become the backbone of how we automate and manage employee services across the entire organization.”*

**Chris Troyer**

*IT Business Partner*  
GreenState Credit Union

## THE CHALLENGE

### Scaling Without Losing Control

As GreenState Credit Union grew from a mid-sized organization to nearly 900 employees, their internal operations became increasingly complex. The dedicated team worked hard to maintain efficiency, but as demands scaled, traditional tools such as checklists, spreadsheets, and separate IT service requests presented new challenges. Managing employee transitions required significant manual effort, making it difficult to maintain visibility and consistency across departments.

Recognizing the need for a more scalable approach, GreenState sought a self-service-driven solution—one that would provide employees with streamlined processes, empower HR and IT teams to automate routine tasks, and enhance overall compliance without adding administrative burden.

### Key Pain Points:

#### Manual Process Burden

- HR & IT relied on labor-intensive processes for onboarding, role transitions, and off-boarding.
- Checklists and email approvals lacked standardization, increasing the risk of **missed steps**.
- Lack of **real-time process visibility** led to bottlenecks.

#### Limited System Integration

- Multiple applications required separate updates, leading to **data inconsistencies**.
- No automated synchronization between HR, IT, and security systems.
- IT had to manually **validate employee permissions**, increasing workload and risk.

#### Compliance & Security Gaps

- No central tracking of **system access history**.
- Inconsistent enforcement of **role-based access controls**.
- Increased audit complexity due to **manual data reconciliation**.

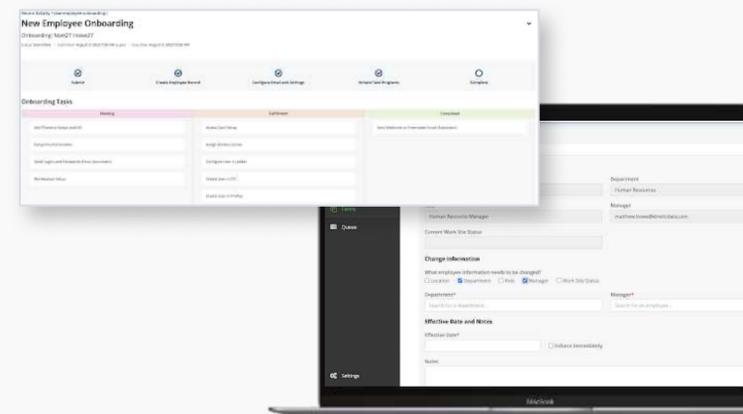
## THE SOLUTION

GreenState Credit Union deployed the Kinetic Experience Platform, embracing a **self-service model** that **decouples the experience layer** from underlying systems. This approach empowered employees with intuitive tools while ensuring backend processes remained automated and scalable. By leveraging a structured three-layer framework, GreenState optimized efficiency and future-proofed its workforce management strategy:

### Self-Service Experience Layer

Enabling HR & IT to manage employee services without relying on backend complexity.

- **Unified digital interface** for all employee lifecycle events—onboarding, promotions, and offboarding.
- **Intelligent self-service forms** ensuring complete and validated data entry.
- **Real-time request tracking**—giving HR visibility into status updates without contacting IT.
- **Consistent employee experience**, eliminating reliance on email-based requests.



### Process Automation (Agility Layer)

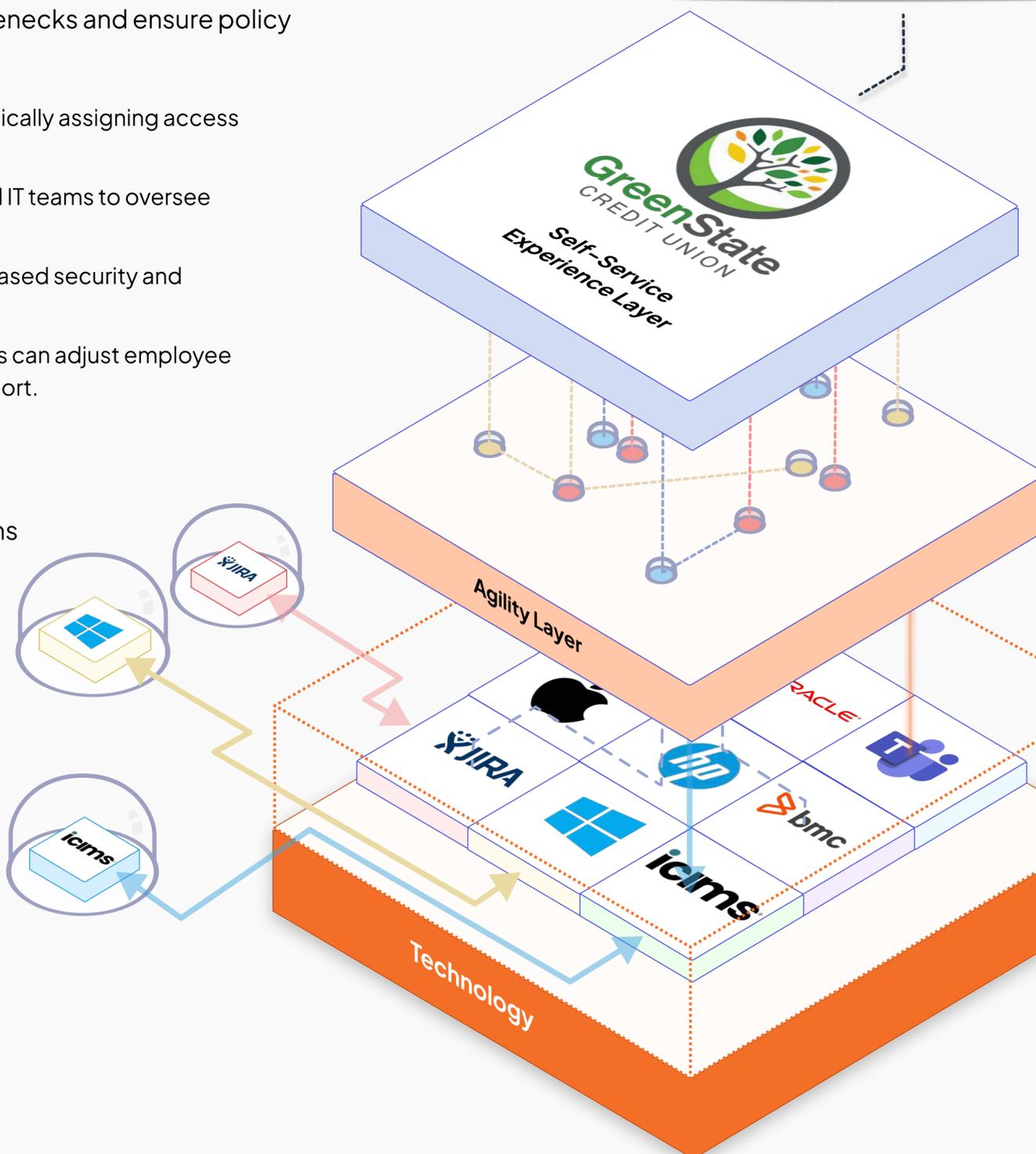
Standardizing workflows to remove IT bottlenecks and ensure policy enforcement.

- **Template-based role provisioning**—automatically assigning access based on department and job function.
- **Self-managed task routing**—allowing HR and IT teams to oversee workflows in real time.
- **Automated validation rules**—ensuring role-based security and compliance without manual intervention.
- **Dynamic workflow updates**—HR and IT teams can adjust employee access requirements without developer support.

### Technology

Seamless integration with existing enterprise systems to automate backend operations.

- **Direct integrations** with Active Directory, HR platforms, and security tools for seamless access synchronization.
- **Automated user provisioning** and deactivation across dozens of systems.
- **Audit-ready compliance reporting** with centralized tracking of all employee transitions.
- **API-driven architecture**, allowing HR and IT to scale automation without reliance on custom development.



## RESULTS & IMPACT

By shifting to **self-service automation** and **decoupling the experience layer** from backend complexity, GreenState Credit Union created a more agile, scalable, and efficient workforce management system. This transformation enabled employees to take control of their own service needs while ensuring IT and HR teams could focus on strategic initiatives rather than manual administrative tasks. The key measurable impacts included:

-  **85% reduction in manual intervention** for employee transitions, enabling a more efficient, self-sustaining workforce.
-  **Seamless onboarding experience**, allowing new employees to instantly access required systems and tools on **day one** through self-service workflows.
-  **Automated role provisioning**, ensuring instant access alignment while removing dependency on IT for routine access requests.



*"Before we had Kinetic, we used Remedy as our ITSM and HR was able to submit tickets in there, but with very little detail or notes... Kinetic takes it to a level where these tickets come in and they're automatically updated in our Active Directory and Exchange. So right off there, we're starting with better accuracy than a human person can do."*

**Sheila Cronbaugh**  
IT Service Excellence Coordinator  
GreenState Credit Union

The self-service approach transformed GreenState's IT and HR collaboration, reducing dependency on one-off IT tickets while giving teams the autonomy to manage their processes.

## Take the Next Step Toward Seamless Onboarding

Organizations across industries—from financial services to healthcare to government—face the same challenge: how to modernize **onboarding** and streamline IT and HR operations without increasing administrative burden. By embracing **self-service automation** and **decoupling the experience layer**, businesses can create a frictionless, efficient, and scalable approach to employee and member onboarding.

Whether you're looking to improve employee onboarding, simplify IT access management, or enhance the member experience, the Kinetic Experience Platform provides the tools to transform your processes. Let your organization focus on what matters most—delivering value and efficiency—while automation handles the rest.

Ready to explore how self-service automation can revolutionize your workflows? Let's connect.

### GET IN TOUCH

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