Improving HR Efficiency Through Streamlined Onboarding & Offboarding

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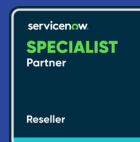
Client Snapshot

- A global financial services firm specializing in investment banking and wealth management
- Headquartered in New York, with offices across North America, Europe, and Asia-Pacific
- Over 800 employees worldwide

The Challenges

The client's ServiceNow environment lacked key configurations, resulting in:

- Missing catalog items for common service requests
- No standardized approval or fulfillment workflows
- Inbound and outbound emails not set up for task communication
- No formal onboarding or offboarding guides, causing delays and inconsistencies

The Solution

Coreio worked closely with HR and IT to streamline the employee lifecycle through scalable, workflow-driven automation:

- **Built 20 new catalog items** to support key service requests
- **Standardized approval and fulfillment workflows** for consistent execution
- **Enabled email automation** for task creation, updates, and closures
- **Implemented onboarding order guide** to automate new hire setup and manage access removal and asset return

Key Outcomes

Increased consistency and reliability with standardized approval and fulfillment workflows across departments

Improved communication and alignment through automated task notifications that reduce delays and manual follow-ups

40% reduction in onboarding & offboarding time through automation to accelerate productivity and lower administrative burden

Enhanced employee experience with structured onboarding and offboarding guides that streamline transitions and strengthen HR-IT collaboration

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