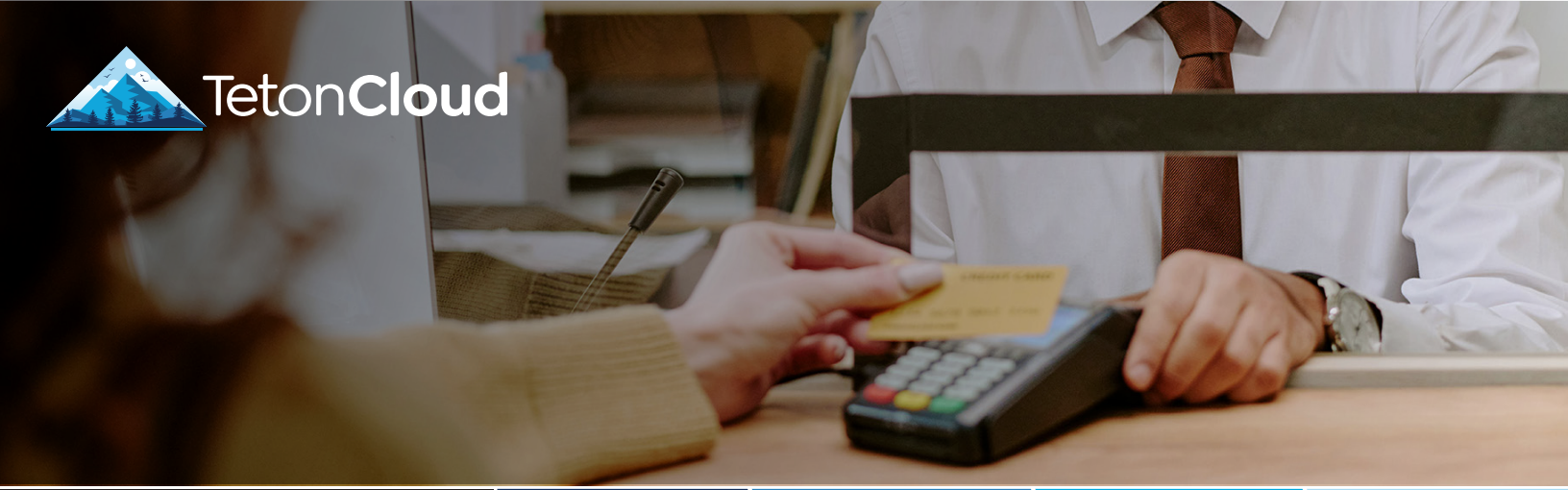
TetonCloud



Microsoft INDUSTRY CASE STUDY | MAP Build the Business Case | CLIMB Modernize Platform & Data | SUMMIT Enable AI & Innovation | Frontier Firm™

Case Study: Leading Credit Union

AI recommends. A human approves. Automation executes only the approved action.

Executive Summary

A leading credit union needed to prove AI could handle real member service requests without surrendering change control. Teton Cloud delivered a governed, Microsoft-native AI Service Request Agent: it captures a representative's natural-language request, classifies it, validates it read-only, and routes a proposal for mandatory human approval — then executes only the approved change, exactly once, with a complete audit trail.

100%
Changes Human-Approved Before Execution

3
Member Service Use Cases Proven End to End

13
Microsoft Services, One Governed Stack

1x
Execution per Approval, Duplicate-Proof

Pilot Use Cases

Card - Move a Recurring Visa Payment:
The agent confirms current card state read-only, and the payment moves only after reviewer sign-off.

Loan - Set an Auto-Pay Date (Day 1–28):
Business rules verify the date and loan status before a proposal ever reaches an approver.

Correspondence - Send a Beneficiary Letter:
The approved letter is sent once, with a full record of who approved it and when.

All three validated end to end against mock Card, Loan, and Correspondence systems.

Business Value

- **Faster Member Service:** natural-language intake with no re-keying of request data.
- **Lower Operational Risk:** nothing reaches a parent system without explicit approval.
- **Audit-Ready by Default:** approvals, timestamps, and correlation IDs stored per request.
- **Enterprise Controls:** role-based security, segregation of duties, and Key Vault secrets.
- **Scales Across the Catalog:** build once, then add request types on the same pattern.

Our Approach:

1 CAPTURE & CLASSIFY
Natural-language request; AI classifies it and extracts the fields.

2 VALIDATE & PREPARE
Read-only checks build a versioned before/after proposal.

3 HUMAN APPROVAL
Reviewer approves, rejects, or requests a correction.

4 EXECUTE & AUDIT
Approved action runs once; outcome logged and confirmed