Enhanced engagement through a lightweight CRM built on PowerApps for a Mobile transformation company

About the Client

The client is a mobile transformation organization enabling business productivity for mid-size enterprises. They develop line of business applications to empower key business processes in order to enhance productivity, business to employee (B2E) engagement and revenue across mobile platforms.
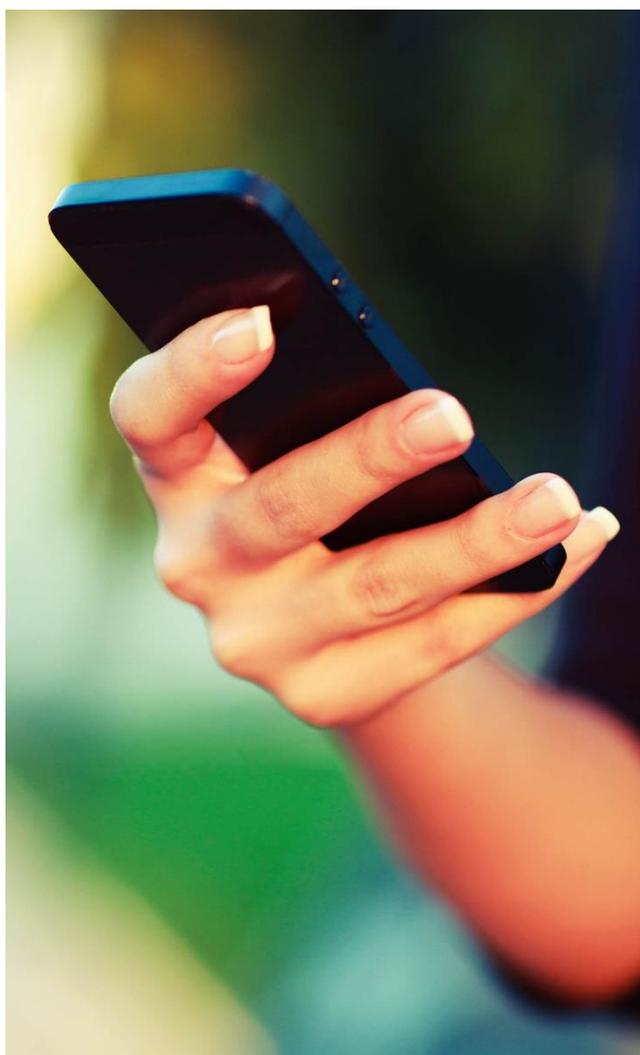
SONATA

SONATA SOFTWARE

Business Need

The organization was in the pursuit to develop a lightweight Customer Relationship Management (CRM) platform that caters to Small and medium-sized businesses (SMBs). The platform enables:

- SMBs to utilize the capabilities of CRM like Sales Management, Relationship Management, Marketing Management, Reputation Management, Social media and third party integrations

- Ability to sync their mailbox and close the sales cycle by accepting end customer payments by linking their platform accounts with widely accepted payment gateways

Technology Solution

Sonata helped to accelerate the product development lifecycle by developing a lightweight CRM application that is powered by Microsoft Power Apps (Model Driven Apps). The platform offers small businesses Microsoft's enterprise-grade capabilities like Security, Scalability, Flexibility, Intelligence and an affordable solution. The key highlights of the platform are:

1. Integration with productivity apps such Gmail or Office 365 accounts and payment services like PayPal and Square

2. **Financial Integration with QuickBooks** that enabled the company to accept, manage and pay bills and related payroll functions

3. **Marketing Integration with Mailchimp** for all integrated marketing operations

4. Access to about two thousand other applications for **integration and automation through Zapier**

Implementation approach

Sonata enabled the client to build the platform using advanced Microsoft technology stack features. Sonata continues to work with the company to enhance the platform in every stage of production and maintenance.

1. Sonata enhanced the overall product experience by implementing some of the key features like automation on signup

2. Automated test scenarios were developed that would reduce 80% of the manual testing effort

3. The platform provided customers options to import the Contacts & Appointments enabling them to engage the moment they signed up on the platform

Microsoft Technology tools used:

PowerApps
(Model Driven Apps)

Power Automate
(MS Flows)

Azure

ASP.NET
MVC
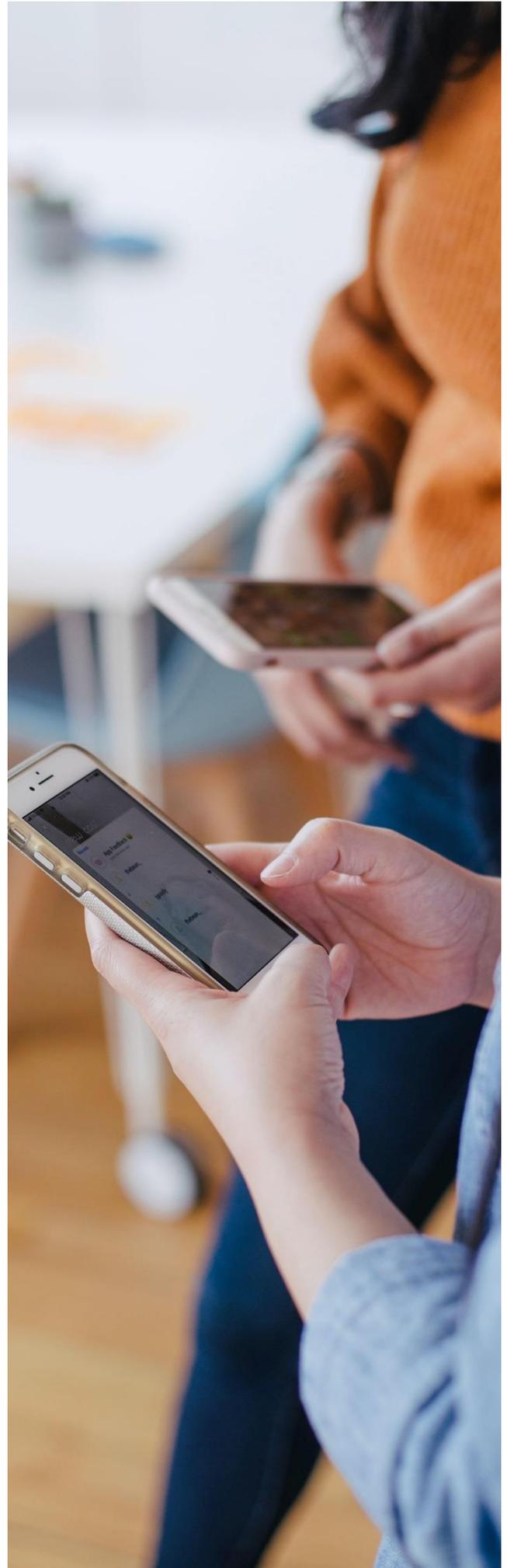
Business Benefits

1. Available on Microsoft AppSource for seamless and easy onboarding of SMB customers
2. A flexible cost effective cloud-based environment
3. High level of integration with popular social media platforms
4. Future readiness of the platform ensured for next level of digital transformation
5. First mover advantage in the world of PowerApps for potential prospects having built a seamless SaaS CRM platform

WHY SONATA?

Sonata helps clients unlock value and growth through Platforms with Sonata's proven Platformation services. We also help enterprises in shaping their Digital Agenda, Platform thinking and in reimagining Platform business models and ecosystem.

Sonata's platformation approach helps clients to choose a solution that best fits their needs; balancing readily available platforms and solution customization

1. **Sonata READY:** End-to-end, industry-specific digital business platforms
2. **Sonata ACCELERATE:** Deploy popular horizontal platforms adding required functionality
3. **Sonata CUSTOM:** Engineer custom platforms that deliver unique digital capability and scalability

Sonata is a global technology company, that enables successful platform based digital transformation initiatives for enterprises, to create businesses that are connected, open, intelligent and scalable. Sonata's Platformation™ methodology brings together industry expertise, platform technology excellence, design thinking-led innovation and strategic engagement models to deliver sustained long term value to customers. A trusted partner of world leaders in the Retail, Manufacturing, Distribution, Travel, services and Software industries, Sonata's solution portfolio includes its own digital platforms such as Brick & Click Retail Platform©, Modern Distribution Platform©, Rezopia Digital Travel Platform©, Kartopia E-commerce Platform©, Halosys enterprise development automation Platform©, and CTRM Commodity trading and risk management Platform©, KODO - AI powered customer experience (CX) Platform, Sonata's Platformation realization services have been specifically designed so that implementation of services on Microsoft Dynamics 365, Microsoft Azure, AWS, Cloud Engineering, Managed Services as well as on new digital technologies like IoT, Artificial Intelligence, Machine Learning, Robotic Process Automation, Chatbots, Block Chain and Cyber Security, deliver to the Platformation promise. Sonata's people and systems are nurtured to bring together the depth of thought leadership, customer commitment and execution excellence to make a difference to business with technology.

SONATA
SONATA SOFTWARE