



Case Study

Financial Services made efficient

Migration from Lotus Notes to Microsoft Power Automate yielding 80% efficiency improvement.

Summary

A leading global financial institution partnered with Sonata to migrate from their outdated Lotus Notes-based system to a modern, efficient platform using Microsoft Power Platform and Office 365, resulting in significant time savings and an 80% efficiency improvement.

Client Overview

The client is a prominent global financial institution renowned for offering comprehensive wealth management, asset servicing, asset management, and banking services to corporations, institutions, and high-net-worth individuals worldwide.

Revenue \$12.8B	Assets \$156.1B	No. of Employees 23,000
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Pressure Points

Manual Process Existing system relied heavily on manual steps using Lotus Notes mail forms.	Error-prone Approvals Cumbersome approval processes with multiple validation stages.	Excel Macros Dependency Updating the Fund Master was prone to issues and required significant manual intervention.
Data-handling Inconsistency Inconsistencies and delays in data processing due to Excel databases.	Complex Queue Management Inefficient management of approved requests via CDM queues or mailboxes.	

Solutions

The client needed a robust solution to streamline operations and improve efficiency. To address these needs, a multi-phased approach was proposed, focusing on the following key solution areas:

Replacement of Legacy System Replaced Lotus Notes mail forms with modern, user-friendly PowerApps forms.	Automation Implementation Automated CDM processes using Power Automate Desktop bots, eliminating outdated Excel macros.	Data Management Enhancement Developed streamlined app-based data consolidation system to reduce manual follow-ups.
Integration with Existing Tools Integrated Outlook and Excel with Power Automate for seamless data and notification management.	App Management Utilized Office 365 for comprehensive application and data management.	

Services

- RPA Platform Modernization
- Application Development

Technology

- Power Apps
- Power Automate Desktop
- O365
- MS Share Point
- Outlook

Results

Efficiency Optimization Significant reduction in manual tasks, leading to faster processing times and fewer errors.	Error Reduction Automated validation and approval processes minimizing human error risks.	Process Streamlining Elimination of redundant steps and improved data handling efficiency.
Faster Turnaround Accelerated processing and approval times through automation.	Enhanced Data Integrity Integration of PowerApps providing live data updates of the Fund Master.	Improved Workflow Visibility Enhanced visibility into approval workflows and statuses.

By the Numbers

2-3 minutes to submit requests, down from 10-15 minutes.	80% efficiency improvement	3 staff members freed up for strategic tasks with CDM queue management automation
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