Case Study

Migrating to Excellence

A Seamless Transition from SFDC to AI-Powered
D365CE to Revolutionize Mortgage Operations

Summary

AI-powered Dynamics 365 solution revolutionized operations for a leading mortgage company, automating lead qualification, loan recommendations, and content generation. By migrating from Salesforce to D365CE, the company is set to slash pre-eligibility response times by 95%, drive a 10% increase in upselling opportunities, and save up to $73,480 annually. This transformative solution significantly enhanced efficiency, reduced costs, and elevated borrower engagement, paving the way for sustainable, scalable growth.

Client Overview

Fifth-largest mortgage company in the United States dedicated to delivering a seamless and customer-focused mortgage experience. A leading retail mortgage lender and the second-largest nonbank retail originator, with over $275 billion in funded loans since its inception.

Headquarter	Revenue
California	**$974 Million**

Customers	Employees
27,000+	**6,000+**

Pressure Points

The client's existing Salesforce CRM system posed significant operational challenges, impacting both efficiency and customer experience. The high total cost of ownership and system limitations were hindering growth and customer service quality.

High TCO with Salesforce licenses and maintenance costs	Fails to fully deliver the critical information needed by loan officers	Inefficient outbound call processes, requiring multiple clicks and manual interventions	Inability to handle multiple sessions simultaneously
Lack of automation for marketing and sales content creation	Gaps in loan product alignment with borrower needs		

Solutions

Sonata's demo highlighted how switching to D365CE, along with the collaboration of Microsoft, Sonata, and the client's IT team, will enable faster feature delivery and future scalability.

Sonata implemented an AI-enhanced Dynamics 365 Customer Engagement solution to streamline operations and elevate customer experiences.

Developed a conversational AI chatbot to assess borrower eligibility and qualify leads	Built an intelligent engine to recommend optimal loan options based on borrower profiles
Built a tool to analyze campaign performance through conversion metrics and engagement data	Automated content generation (emails, social media posts) for marketing and sales teams using contextual borrower data

Expected Outcomes

The solution will streamline lead qualification by eliminating unqualified leads and engaging borrowers through regular, interactive pre-screening conversations. Personalized product recommendations will enhance customer satisfaction and boost conversions while automating initial product suggestions will significantly improve loan officer efficiency.

95%	**10%**	**10X**	**$73,480**
reduction in pre-eligibility response time	increase in upselling and cross-selling opportunities	faster campaign analysis and optimization	annually by transitioning 1,670 Salesforce licenses to Dynamics licenses