

Smarter claims, seamless conversations

Enhancing D365 CE implementation with Copilot and live chat capabilities



The Modernization Engineering Company



Summary

Sonata Software enhanced an existing Dynamics 365 Customer Engagement (D365 CE) implementation for a leading US-based insurance provider by enabling Copilot and Live Chat capabilities. The solution leveraged AI and automation to streamline case creation, improve advisor productivity, and provide real-time access to member information. As a result, the client reduced call handling time by 65% while significantly improving both agent and member experience.

Customer overview

A larger insurance payer operating in the US with over 5,000 employees.

Pressure points

The client faced operational inefficiencies due to fragmented access to policy and product information. Advisors required significant time to navigate multiple documents per member, leading to longer case resolution times and inconsistent customer interactions. The absence of advanced AI-driven tools limited real-time engagement and impacted overall service quality.

Average case resolution time of 15 minutes

Multiple documents (10–12 per member) depending on insurance type

Inconsistent quality of responses across advisors

Limited real-time interaction with end users

Legacy processes not leveraging best-in-class CRM capabilities

Solution highlights

Sonata Software enhanced the client's D365 CE environment by integrating Copilot and Live Chat to create a more intelligent, responsive, and advisor-friendly CRM ecosystem. The solution focused on improving customer experience and advisor productivity through AI-powered automation, real-time information access, and intuitive user interfaces.

AI-enabled case creation and improved user experience

Member Summary landing page for advisors

AI-driven interpretation of member benefits

Customizable alert tool for proactive case handling

Live Chat integration with MyChart

Automation capabilities embedded within Dynamics 365 CE

Results that speak volumes

65% reduction in average call handling time per call

Improved agent and member experience

Simplified training and onboarding for advisors

Faster service delivery without compromising cost or quality

Smooth change management and ease of support

Enhanced overall customer satisfaction