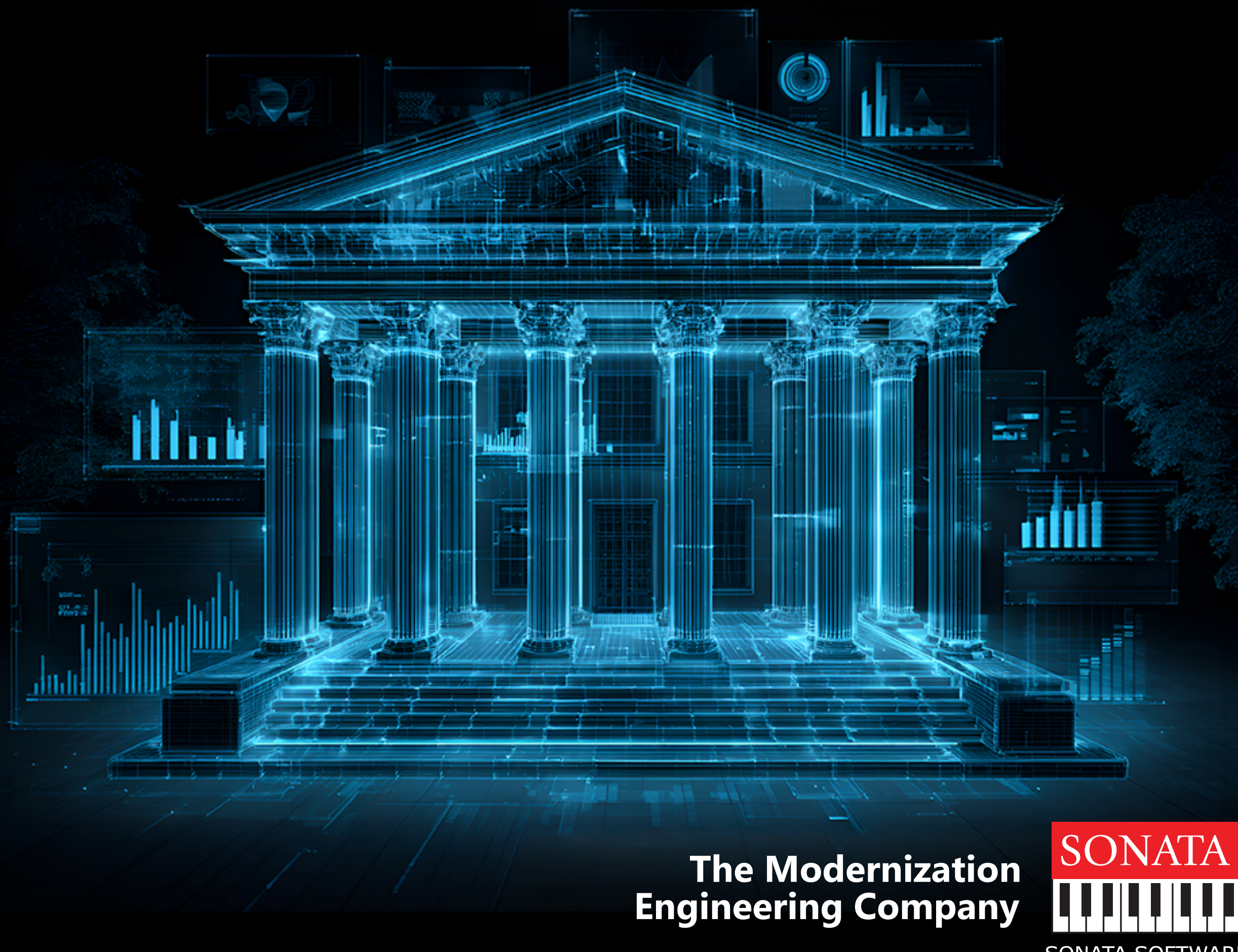


Trading on intelligence

Transforming communications with Agentic AI-powered email automation



The Modernization Engineering Company



Summary

A leading financial services firm serving prominent Wall Street hedge funds faced growing inefficiencies in managing high volumes of customer service emails related to investments and portfolios.

Sonata deployed its AgentBridge multi-agent AI orchestration framework, integrated with Microsoft Dynamics 365, to automate email triaging, response generation, and human-in-the-loop validation. The solution reduced manual workload by 50–70% and accelerated response turnaround time by 4X, enabling scalable and governance-driven operations.

Customer overview

Leading financial services firm, serving leading Wall Street Hedge Funds.

Pressure points

The client’s customer service operations were heavily dependent on manual email handling for investment and portfolio-related queries. As email volumes grew by 12–15% year-over-year, the existing process became increasingly inefficient and difficult to scale.

30–40 employees manually managed inboxes, leading to inefficiencies and response delays

Microsoft Dynamics 365 was available as the CRM but not integrated into the email response process

Manual efforts were non-scalable as the email volume grew by ~12-15% YoY basis

The client sought to automate email workflows, improve accuracy, reduce turnaround times, and enable scalability – all while ensuring compliance and governance.

Solution highlights

Sonata implemented AgentBridge, its multi-agent AI orchestration framework, to transform the client’s email management process. The solution established an AI-driven workflow foundation capable of understanding email context, classifying requests, and orchestrating intelligent responses.

Specialized AI agents used:

Triage agent
for intent, urgency, and priority classification

Response agent
to generate personalized, context-aware email replies using LLMs

Approval agent
for human-in-the-loop (HITL) validation of sensitive cases.

Seamless integration with Microsoft Dynamics 365 enables the retrieval of customer history and transaction records to ensure context-aware, personalized responses.

Solution architecture

- The system reads the email subject and body to understand the requested action (query, information, or transaction).
- Emails are classified based on their content into different categories (e.g., transaction-related, account inquiries) using a lightweight LLM model.
- If the action can be auto-resolved, the system sends a reply email. If human intervention is required, it escalates the email for manual handling.

Benefits of the solution

Improved operational efficiency across customer service teams

Faster, more accurate responses to investment-related queries

Enhanced governance with structured human-in-the-loop validation

Modular solution sets the stage for expansion into chat assistants and document processing

Enabled scaling of email volume management without a proportional increase in team size

By the numbers

50-70% reduction in manual email processing workload

4X acceleration of response turnaround