

Case Study

Smart shift for stronger systems

Industrial services provider powers transformation with Dynamics 365 and Sonata’s engineering expertise

Summary

To support its global expansion and overcome the constraints of aging systems, a multinational industrial services company partnered with Sonata to modernize its digital infrastructure. By implementing Microsoft Dynamics 365 Finance & Operations and a next-generation CTRM platform, the company unlocked significant operational efficiencies, improved decision-making, and established a scalable foundation for future growth. The result: increased productivity, reduced costs, and a streamlined path to global agility.

Client Overview

The client is a leading provider of on-site industrial services catering to steel manufacturers worldwide. Operating in over 90 sites across 17 countries, the company plays a vital role in maintaining operational excellence for its partners. With expansion on the horizon and evolving business needs, the organization sought a future-ready platform to enable smarter, faster, and more connected operations across its global footprint.

The goal: upgrade legacy systems to a more agile, scalable, and future-ready platform.

To realize this vision, the organization partnered with Sonata. Leveraging Sonata’s deep modernization expertise and its proprietary Modernization Upgrade Accelerator, the transition to Microsoft Dynamics 365 Finance & Operations (F&O) was executed smoothly. Alongside the ERP upgrade, Sonata also implemented a modern CTRM platform—delivering enhanced efficiency, visibility, and agility across the business.

Global footprint
17 countries

Headquarters
Pittsburg

Pressure Points

While the company had been operating successfully on existing systems, the limitations of legacy platforms were beginning to hinder future growth. Managing operations across legal entities in the USA and Canada, the organization faced challenges in several areas:

Difficulty scaling to support entry into new markets

Fragmented workflows slowing execution and reporting

Limited integration capabilities with external tools and systems

Increasing complexity and cost of maintaining outdated technology

A modernization initiative promised a streamlined, responsive, and adaptable digital foundation—ready to grow with the business.

Solution

The organization found its ideal modernization partner in Sonata—a platform engineering company with a robust track record in large-scale transformations. Sonata’s deep expertise in Microsoft technologies and structured execution model ensured a smooth transition with minimal disruption.

The solution focused on two core initiatives:

A fast-tracked upgrade to Microsoft Dynamics 365 Finance & Operations using Sonata’s Modernization Upgrade Accelerator, reducing migration timelines by nearly half

Implementation of a next-generation Commodity Trading Risk Management (CTRM) platform to improve control, streamline trading processes, and enhance risk management

Together, these upgrades delivered a flexible, connected, high-performance platform aligned with the company’s long-term strategic goals.

Key Features

- Accelerated migration framework ensuring speed and stability
- Centralized CTRM platform for real-time trade execution, position tracking, and risk oversight
- Seamless integration with external systems like banks, broker portals, weighbridges, and carriers
- Scalable system architecture enabling expansion into new geographies and business verticals
- Power BI-driven advanced analytics for rapid reporting and actionable insights

Benefits

The transformation delivered measurable operational improvements:

\$1M–\$1.5M in annual savings through streamlined CTRM processes and standardized workflows

30% cost reduction by eliminating inefficiencies and enhancing performance

20% productivity boost across business units thanks to connected, automated processes

Improved visibility and faster decision-making with a unified data backbone

Built-in scalability supporting future rollouts across Asia, Europe, and South America

Conclusion

By partnering with Sonata, the organization successfully transitioned from outdated systems to a modern, cloud-enabled platform designed for agility and growth. This transformation not only optimizes daily operations but also equips the business with the capabilities needed to confidently scale into new markets.

A pivotal step in its digital evolution, the new system positions the company to lead in a fast-changing, global industry—backed by the speed, intelligence, and resilience of modern enterprise technology.