Case Study

Polishing retail performance with AI

Elevating luxury jewelry retail with unified
AI agents and data-driven merchandising

**The Modernization
Engineering Company**

SONATA
SONATA SOFTWARE

Summary

Sonata Software partnered with a leading luxury jewelry retailer to transform their operations through AI-driven innovation. By developing a unified 'One Copilot' solution powered by Microsoft Copilot Studio, Azure Foundry, and Fabric, Sonata is enabling seamless access to enterprise data across disconnected systems. The solution connects Dynamics 365, Salesforce, OneDrive, and SharePoint, freeing employees from repetitive tasks and empowering them with AI-powered assortment planning capabilities. This initiative will deliver significant productivity gains while creating a scalable, future-ready foundation for AI-first retail operations.

Customer overview

A US-based luxury jewelry retailer specializing in engagement rings, diamonds, gemstones and high-end watches.

Headquarters	Employees	Revenue
Washington	**800+**	**$1 billion**

Pressure points

The client's employees faced inefficiencies due to scattered information across disparate systems, limiting their ability to make data-driven decisions. Legacy processes slowed down merchandising and assortment planning, while repetitive, low-value tasks consumed valuable employee time.

Employees spent significant time searching for specific information across disconnected systems

Legacy processes limited ability to make data-driven assortment and merchandising decisions

Scattered structured and unstructured data across SaaS platforms and collaboration tools

Need to free up time from repetitive 'busy work' to focus on higher-value tasks

Desired outcome: The client aimed to enable AI-driven access to data across the enterprise, improve assortment planning through predictive AI and intelligent agents, and deploy scalable Copilot-based solutions to boost productivity and decision-making. They also sought to leverage Microsoft technologies such as Fabric, Copilot Studio, and Azure Foundry to drive modernization and scale.

Solution highlights

Develop a unified 'One Copilot' solution with underlying agents for enterprise search

Connect D365, Salesforce (SFDC), OneDrive, and SharePoint to Copilot Studio for seamless knowledge access

Build assortment planning solution leveraging Azure Foundry and AI agents

Human-in-the-loop model initially, transition towards autonomous AI-driven recommendations

Technology used

• Microsoft Fabric (data unification & analytics)
• Copilot Studio
• Azure Foundry

• Dynamics 365
• Salesforce (SFDC)
• OneDrive & SharePoint integrations

Expected benefits

Free up employee time from repetitive 'busy work', enabling productivity gains

Improve assortment planning decisions with AI-driven insights

Create scalable AI-first foundation leveraging Microsoft technologies

Generate incremental Microsoft licensing and consumption revenue

Enable scale by reducing time spent on repetitive tasks

Strengthen partnership value through Fabric, Copilot Studio, and Azure Foundry adoption