

# Resolving at speed

Driving service excellence through Dynamics 365 customer service implementation

The Modernization  
Engineering Company



## Summary

Sonata Software helped the client streamline end-to-end Customer and IT Service processes using Microsoft Dynamics 365 Customer Service. By leveraging out-of-the-box Microsoft capabilities and targeted customizations, Sonata enabled efficient ticket handling, improved turnaround time, and enhanced visibility into service performance for business leadership.

## Customer overview

An independent benefits solutions firm that specializes in customized employee benefit communication, enrollment, and HR support services.

Headquarters : Employees  
**Connecticut** : **100+**

## Pressure points

The client was operating with an existing D365 CE system for sales and services processes but lacked an integrated approach to managing the complete customer and IT service lifecycle. The organization needed to streamline operations from initial customer contact through to final issue resolution while providing leadership with clear visibility into service performance and operational metrics through actionable data insights.

## Solution highlights

Sonata Software implemented Microsoft 365 customer service, leveraging the platform's out-of-the-box functionalities while building on Microsoft standards.

Built custom fields on lead and opportunity to capture more information improving in operational efficiency and analytics

Built custom process on customer and IT Service areas to handle external and internal tickets effectively

Enable Dynamics 365 App for Outlook for better email tracking and communication with customer

## Results that speak volumes

Streamlined customer service processes with increased operational efficiency

Enhanced visibility into day-to-day service activities across the organization

Improved ticket management with robust time tracking and escalation capabilities

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Greater reduction in turnaround time for issue resolution

Higher customer satisfaction scores

Comprehensive performance visibility through custom reports and dashboards