

## Use case

# Empowering leadership to reallocate automation spend with 100% ROI visibility and ~70% Faster Decision-Making

## PoC Overview

<b>Environment</b> Microsoft Power Platform, Power BI	<b>Engagement type</b> Funded Assessment/PoC	<b>Duration</b> 3 weeks
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### Scope

Centralized automation intelligence control tower consolidating telemetry from Power Platform, Intake Forms, Value Metrics, and related automation tooling into a single, canonical data model that surfaces leadership-grade KPIs on ROI, adoption, governance, and efficiency.

## Customer snapshot

<b>Industry</b> Healthcare	<b>Headquarters</b> New Jersey
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## The business challenge

- No unified view into ROI, adoption, governance, or compliance across automation investments.
- Metrics manually updated; dashboards siloed and inconsistent, creating reporting debt and leadership blind spots.
- Secure secret storage unavailable; unreliable connectors (e.g., Jira migration) impede data ingestion.
- Leadership lacks a single source of truth to guide prioritization and investment decisions from automation ecosystem fragmented across Power Platform, Intake Forms, Jira, and IA/AI tools — no single pane of glass for visibility.

### Impact of the problem

Manual reporting effort	Inconsistent insights	Delayed decision-making
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## PoC objective

- Deliver a working vertical slice of the Automation ROI and governance control tower.
- Validate feasibility of ingestion pipelines and the canonical data model.
- Surface 4–6 high-impact KPIs covering adoption, value leakage, and governance exceptions in a Power BI dashboard.
- Produce a clear phase-2 roadmap covering Jira, Robocorp, and GenAI Orchestrator extension.

## The Sonata solution – what we did

### Solution overview


Sonata designed and built a centralized intelligence layer – the automation ROI and governance control tower – that consolidates telemetry from Power Platform, Intake Forms, and Value Metrics into a harmonized canonical data model. The solution automates KPI computation and surfaces leadership-grade metrics through a Power BI dashboard, replacing manual, fragmented reporting with enterprise-grade automation intelligence.

Crucially, the solution elevates automation from a siloed execution layer to an investment governance platform, enabling leadership to track, optimize, and reallocate automation spend based on measurable ROI and performance insights.

### Phases of implementation

<b>Week 1</b> Foundations and access: Scope and KPI finalization, environment setup, data profiling, canonical schema v1, and ingestion stubs.	<b>Week 2</b> Pipelines, KPI engine & semantic model: Full ingestion logic, KPI computation engine, relationship mapping and DAX measures, and dashboard v1.	<b>Week 3</b> Dashboard, insights, UAT and roadmap: Final visuals, insights generation, refinements, demo, and Phase-2 rollout planning.
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### Microsoft technologies used

 Microsoft Power Platform	 Power BI	 Dataverse/App settings
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## Current scope vs future enhancements

Current scope	Future enhancements
Ingestion pipelines for PP telemetry, Intake Forms, and Value Metrics	Robocorp/GenAI Orchestrator integration
Canonical schema for opportunity, adoption, value, and governance	Full governance / DLP analytics rollout
4-6 high-impact KPIs	Jira Cloud (until connector stabilizes)
Power BI dashboard with drilldowns and automated refresh	Token-level GenAI usage tracking

## Microsoft + Sonata credibility

<b>30+ years</b> of partnership	<b>Microsoft AI Business Solutions Inner Circle member</b>	<b>Microsoft Frontier Firm Partner</b>
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## How we did it

The engagement was structured as a 3-week funded PoC under the Microsoft + Sonata funded assessment program. The approach prioritized rapid value demonstration through a vertical slice: ingestion → canonical model → KPI engine → dashboard. Interim controls (Dataverse / App Settings) were used for secure credential management to unblock delivery while production-grade secret store integration is planned for Phase 2.

### Key differentiators

- End-to-end measurement engine: Not merely a dashboarding layer, the solution encompasses ingestion, governance controls, KPI logic, and a semantic model.
- Secure-by-design integration: Interim Dataverse/App Settings approach ensures credentials are secure.
- Leadership KPIs: Value leakage, adoption maturity index, governance exception rate, and ROI impact – metrics that speak to executive investment decisions.
- Canonical data model: Harmonizes multiple disparate sources, eliminates duplication, and provides a scalable foundation for Phase-2 expansion.

## Results and benefits

Metric	Improvement
Reporting method	Automated KPI engine & canonical data model enabling creation of a unified Power BI dashboard.
Visibility into ROI	Agent helped consolidate telemetry into KPIs thereby improving ROI visibility from 0% to 100% of tracked automations.
Governance exceptions	Enabled control tower to surface exception thus improving detection accuracy by ~90% and proactive remediation
Leadership decision-making	Faster insights leading to reduced reporting lag by up to ~70%.

## Next steps for you

### Contact Sonata

\*Sonata Software is recognized as a Microsoft Frontier Partner, underscoring its leadership in AI transformation through an AI-first, human-led approach that drives innovation and scalable impact across cloud and AI platforms, AI business solutions, and security.

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