



Use case

Reducing severance cycle time by 50–60% using Microsoft Copilot and agentic AI

PoC Overview

Environment Microsoft Azure/Microsoft Power Platform/ Workday | **Engagement type** Funded Assessment/PoC | **Duration** 4 weeks

Scope

Automating the end-to-end severance approval workflow across HR, finance, and legal functions using Microsoft Copilot Agents, Power Automate, Dataverse, and Microsoft Teams, integrated with Workday extract data and simulated Oracle posting.

Customer snapshot

Industry Healthcare | **Headquarters** Utah

The business challenge

Impact of the problem

Impact area	Current challenge
Compliance and payout errors	Manual updates without validation checks
Cycle time/delays	Multi-round reviews across HR, legal, finance
Data reconciliation effort	Disparate systems (Workday, Excel, Oracle)
Audit and traceability	No centralized system of record

PoC objective

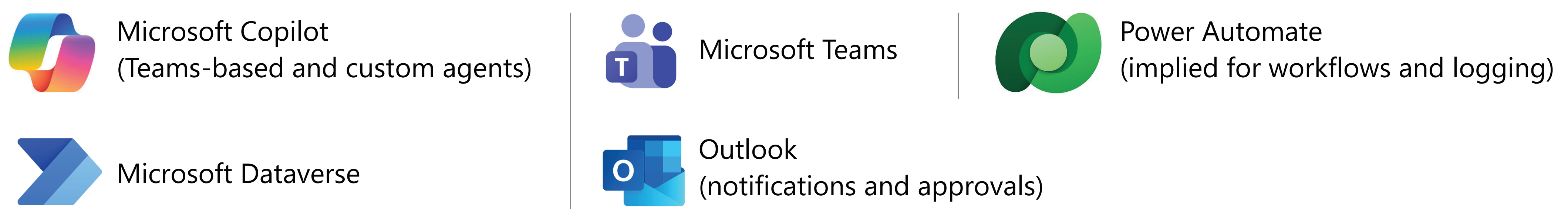
- HR can upload post-shortlisting employee data via Teams Copilot and the data is successfully stored in Dataverse.
- The system can enrich employee records using Workday extract data (via uploaded file).
- The Orchestrator Copilot triggers the HR → Finance handoff workflow automatically.
- Finance Copilot can calculate or update severance-related accrual amounts using stored business rules and parameters.
- The system can generate a journal entry output in CSV format, suitable for Oracle posting simulation.
- All workflow steps, decisions, and values are traceable within Dataverse for audit purposes.

The Sonata solution – what we did

Solution overview

- Built a centralized severance tracker using Microsoft Dataverse
- Enabled data intake via Excel uploads through Copilot in Microsoft Teams
- Enriched employee data using Workday extracts
- Implemented AI-driven workflow orchestration between HR and Finance
- Developed Copilot Agents for HR, Finance, and orchestration workflows
- Automated accrual calculations using predefined business rules
- Enabled notifications and approvals via Teams Adaptive Cards and Outlook
- Established audit logging and status tracking within Dataverse
- Delivered a conversational AI experience through custom Copilot Agents

Microsoft technologies used



Current scope vs future enhancements

Current scope

- Excel-based employee data intake via Teams Copilot
- Dataverse-based centralized tracker
- Workday data enrichment via extract/file
- HR → finance workflow orchestration via Copilot agents
- Finance Copilot for accrual calculations
- HRBL agent for data intake and approvals
- Journal entry CSV generation (Oracle simulation)
- Notifications via Teams and Outlook
- Audit logging and tracking in Dataverse
- Conversational AI interface for users

Future enhancements

- Business case creation and employee eligibility approvals
- Direct integration with Workday (Excel extract used instead)
- Actual Oracle posting (simulated via CSV)
- Detailed legal validations and full review processes
- Parallel/multi-project execution flows
- User acceptance testing
- Production deployment and go-live support

Microsoft + Sonata credibility

30+ years
of partnership

Microsoft AI Business Solutions
Inner Circle member

Microsoft Frontier
Firm Partner

Results and benefits

Metric	Improvement
Severance data management	Centralized Dataverse tracking to ensure elimination of reconciliation errors by establishing a single source of truth.
Cycle time /delays	Automated orchestration via Copilot agents thereby reducing cycle time by 50-60%
Compliance/ payout errors	Rule-based accrual calculations + audit logging leading to reduced errors by up to 75% and achieving full auditability.

Next steps for you

Contact Sonata

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