

Inbox to impact

Modernizing insurance workflows on Microsoft 365

The Modernization
Engineering Company



Summary

Sonata helped the client modernize a legacy COM-based Outlook add-in into a React-based Microsoft 365 add-in for insurance agents. The solution streamlines email and attachment filing, enables accurate tagging to client, policy, and service contexts, and adds AI-assisted summaries – improving agent productivity, documentation quality, IT manageability, and readiness for future AI-led workflows.

Customer overview

An insurance technology provider delivering cloud-based software used by agencies and brokerages to manage policy servicing, client communication, documentation, and daily operational workflows.

Headquarters Illinois	Revenue \$500+ million	Industry Insurance software
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Pressure points

The client needed to retire a legacy COM-based Outlook add-in and move to a modern Microsoft 365 add-in model. The existing approach created technology, deployment, and user-experience constraints: desktop dependency, heavier release management, inconsistent cross-platform behavior, and limited flexibility for AI-enabled workflow enhancements. At the same time, agents needed a faster way to capture email-based servicing work without misfiling, missing tags, or duplicating documentation effort.

Key challenges:

- **Technology obsolescence:** The COM-based add-in model had become harder to sustain as Microsoft 365 advanced toward modern, web-enabled extensibility.
- **Microsoft 365 platform shift:** The client needed to leverage the new Outlook add-in platform to support a consistent experience across desktop and web users.
- **Manageability and deployment friction:** Legacy plug-in management increased administrative effort for upgrades, compatibility testing, governance, and support.
- **Manual filing and tagging risk:** Agents spent time downloading, uploading, classifying, and tagging communication, increasing the chance of errors and rework.
- **AI-readiness gap:** The legacy foundation limited the ability to embed AI assistance into documentation, summarization, and workflow guidance.

Solution highlights

Sonata Software engineered a modern Outlook add-in using React and Microsoft 365 add-in capabilities, transforming the inbox into a connected workspace for insurance agents. The solution helps agents file and tag emails and attachments to the right client, policy, or service context with fewer steps; use AI-assisted summaries to accelerate activity documentation; and work within a more secure, manageable, and scalable architecture. Sonata combined product engineering, user experience design, API integration, Microsoft ecosystem expertise, AI enablement, DevSecOps, quality engineering, and release governance to deliver a modernization program designed for enterprise adoption.

Modern Microsoft 365 add-in
Replaced the legacy COM dependency with a standards-aligned Outlook add-in foundation designed for desktop and web experiences.

Seamless filing and tagging
Enabled emails and attachments to be associated with the correct business context, reducing manual handling and tagging errors.

Enterprise manageability
Improved deployment, updates, governance, and supportability through a modern add-in architecture aligned with Microsoft 365.

React-based agent experience
Delivered an intuitive, responsive interface that keeps high-frequency servicing actions inside the inbox workflow.

AI-infused documentation
Used AI-assisted summarization to help agents convert email threads into concise, reviewable activity summaries.

Sonata technology depth
Brought together Microsoft engineering, React, integration design, AI, security-aware delivery, and quality automation.

Results that speak volumes

Higher agent productivity
Fewer clicks and less context switching help agents complete email-based servicing work faster from Outlook.

Faster client response
Agents can act on communications, attachments, summaries, and documentation from one embedded workflow.

Improved IT manageability
A Microsoft 365 add-in model simplifies governance, rollout, compatibility management, and long-term support.

Reduced errors and rework
Seamless tagging and contextual filing reduce misfiled communication, duplicate handling, and inconsistent documentation.

Better documentation quality
AI-assisted summaries support more consistent activity capture while keeping agents in control of the final record.

Future-ready foundation
The React and Microsoft 365 architecture creates a scalable platform for additional AI-led workflow automation.

By modernizing a legacy Outlook integration into a managed, AI-ready Microsoft 365 experience, Sonata helped turn the insurance agent inbox from a disconnected communication channel into a more accurate, productive, and scalable service workspace.