

## Use case

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

## PoC Overview

|                                                          |                                                 |                            |
|----------------------------------------------------------|-------------------------------------------------|----------------------------|
| <b>Environment</b><br>Microsoft Power Platform, Power BI | <b>Engagement type</b><br>Funded Assessment/PoC | <b>Duration</b><br>3 weeks |
|----------------------------------------------------------|-------------------------------------------------|----------------------------|

**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><br>Healthcare | <b>Headquarters</b><br>New Jersey |
|-------------------------------|-----------------------------------|

## 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 |
|-------------------------|-----------------------|-------------------------|

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

|                                                                                                                 |                                                                                                 |                                                                                                               |
|-----------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------|
| <br>Microsoft Power Platform | <br>Power BI | <br>Dataverse/App settings |
|-----------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------|

## 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><br>of partnership | <b>Microsoft AI Business Solutions Inner Circle member</b> | <b>Microsoft Frontier Firm Partner</b> |
|------------------------------------|------------------------------------------------------------|----------------------------------------|

## 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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