



## Use case

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

## PoC Overview

|                                                                         |                                                 |                            |
|-------------------------------------------------------------------------|-------------------------------------------------|----------------------------|
| <b>Environment</b><br>Microsoft Azure/Microsoft Power Platform/ Workday | <b>Engagement type</b><br>Funded Assessment/PoC | <b>Duration</b><br>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

|                               |                             |
|-------------------------------|-----------------------------|
| <b>Industry</b><br>Healthcare | <b>Headquarters</b><br>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

|                                                                                                                                          |                                                                                                                              |                                                                                                                                           |
|------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------|
|  Microsoft Copilot<br>(Teams-based and custom agents) |  Microsoft Teams                          |  Power Automate<br>(implied for workflows and logging) |
|  Microsoft Dataverse                                  |  Outlook<br>(notifications and approvals) |                                                                                                                                           |

## Current scope vs future enhancements

| Current scope                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | Future enhancements                                                                                                                                                                                                                                                                                                                                                                                                                          |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"><li>• Excel-based employee data intake via Teams Copilot</li><li>• Dataverse-based centralized tracker</li><li>• Workday data enrichment via extract/file</li><li>• HR → finance workflow orchestration via Copilot agents</li><li>• Finance Copilot for accrual calculations</li><li>• HRBL agent for data intake and approvals</li><li>• Journal entry CSV generation (Oracle simulation)</li><li>• Notifications via Teams and Outlook</li><li>• Audit logging and tracking in Dataverse</li><li>• Conversational AI interface for users</li></ul> | <ul style="list-style-type: none"><li>• Business case creation and employee eligibility approvals</li><li>• Direct integration with Workday (Excel extract used instead)</li><li>• Actual Oracle posting (simulated via CSV)</li><li>• Detailed legal validations and full review processes</li><li>• Parallel/multi-project execution flows</li><li>• User acceptance testing</li><li>• Production deployment and go-live support</li></ul> |

## Microsoft + Sonata credibility

|                                    |                                                               |                                           |
|------------------------------------|---------------------------------------------------------------|-------------------------------------------|
| <b>30+ years</b><br>of partnership | <b>Microsoft AI Business Solutions</b><br>Inner Circle member | <b>Microsoft Frontier</b><br>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

\*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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