SONATA SOFTWARE | **The Modernization Engineering Company**

Case Study

Tool-driven Migration with Minimal Transition Cost

Customized Solutions Accelerators with AI capabilities

Overview:

The client is a Fortune 50 Healthcare Payer company from the United States. It operates as a Health Insurer providing health plans and clinical, behavioral, pharmacy, and complex-care solutions that promote whole health.

Sonata Software engaged with the client by helping them migrate from their current CRM system to Dynamics 365 CE. This conversion process focused on modernizing their Sales Process for Brokers, employees, and members.

Pressure Points

The major challenge that the healthcare giant faces is the problem of high ownership costs together with low return values on the current CRM investments.

High cost of ownership and ensure that investment in CRM delivers maximum value and returns	Disjointed data views that impede effective customer engagement	Need for optimized sales processes for efficiency and effectiveness
Dire need to establish comprehensive CRM capabilities that truly support business objectives	Facilitate smooth interaction among various sales personas, such as brokers, employees, and customers	

Solutions

The Health Insurer chose Sonata Software to facilitate a smooth migration from their current CRM system to Dynamics 365 CE.

Used an IP-based tool for assessment and migration with personalized and guided journeys	Defined intelligent business processes: Quote to Card, driven by Copilot	Created a Data Migration plan from the existing system
Provided actionable AI-driven insights & analytics to client's associates to measure the performance against the sales goals	Customized Solution Accelerators to meet client's needs	
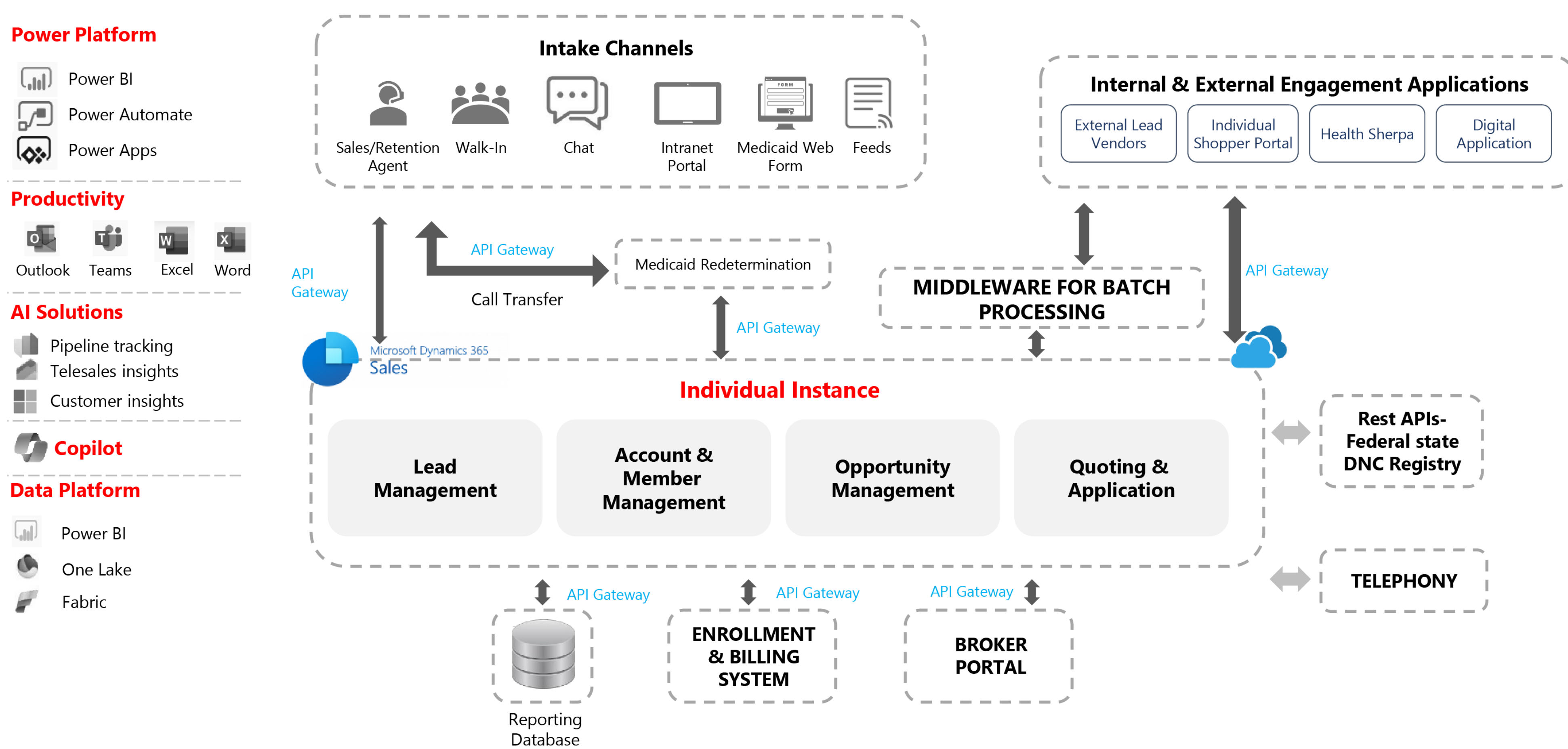
Key MS D365 CE Features

- **Customer Insights:** Improved Customer Journeys

- **Lead Scoring:** Using real data, AI can help determine which factor(s) have led to Lead Conversion and help in prioritization

- **Sequencing:** Create a Sales Playbook, checklists for guiding agents to close deals, and Auto-create activities with future due dates

- **Unified Routing**: Configuration-based rules for automatic routing and assigning leads & cases

- **Copilot:** Know Your Customer | AI-Generated Account Summary | Prepare for Calls/meetings | AI-Generated Preparation Notes

- **Microsoft Fabric Integration:** Blend on-prem/in-cloud data for powerful Reports. Enhancing capabilities of Power

- **Teams Integration:** Record sharing and real-time collaboration. Inbound/Outbound Telephony

Benefits

50% saving in CRM license cost and enhanced business performance	Streamlined workflows and improved efficiency with AI-driven conversational insights and productivity tools integration	**Improved agent productivity** via AI virtual Assistant with sales CoPilot
Better Customer Service and **seamless integration** with third parties	Helped build **personalized sales strategies**	**Reduced overall sales** cycle to maximize cross-selling and up-selling opportunities