



Navigating the Premium Path

Migrating the Existing CRM to Dynamics for a Major US-Based Health Care Company

Accelerated migration to Microsoft Dynamics 365 CE with AI capabilities



Overview:

Sonata Software's intervention transformed the operations of the largest for-profit managed health care company in North America. We slashed license expenses by 50%, allowing reinvestment. Utilizing Gen AI, we unlocked customer insights, boosting revenue. Sonata's migration strategy to Dynamics 365 CE ensured swift benefits realization, minimizing disruptions.

Revenue

USD 160B

Size

100000+ Employees

Pressure Points

The Health Care major faced the challenge of a low Return on Investment (RoI) on its current expenditure and wanted a partner to enable Migration from their existing CRM system to Dynamics 365 CE.

Multi cloud working with all hyperscalers	Invested in multiple leading SAAS solutions encompassing Sales, Services and Marketing	Projected 5 year spend going up to 200 million USD+ in licenses alone (80% of this spent on Sales and Services Cloud)
Low ROI on current spending	Looking to leverage Gen AI capabilities where current platform's roadmap is not meeting both velocity and business priorities	

Solutions

The Healthcare company chose Sonata Software to facilitate the migration of the company's CRM system to Microsoft Dynamics 365 CE. The collaboration between the Health Insurance Company, Microsoft, and Sonata Software exemplifies a strategic partnership focused on delivering innovative solutions tailored to meet the evolving needs of the healthcare technology sector.

Sonata Software collaborated closely with CXO level executives and key stakeholders from Microsoft to devise a comprehensive solution to address their challenges	Together, they articulated a clear business case and roadmap, ensuring alignment with senior stakeholders' strategic objectives
Central to the solution was the implementation of an integrated CRM Sales Platform, designed to offer a 360-degree view of customers. This holistic approach aimed to enhance lead management and improve customer relationship efficiency across the organization	

Results

Sonata Software successfully reduced Healthcare major license spend by an impressive 50%, freeing up resources for other critical investments	Leveraging the power of Gen AI, Sonata Software enabled the health care major to gain deeper customer insights and align with key business priorities, driving significant topline growth
Moreover, Sonata Software implemented a robust migration plan that de-risked the accelerated migration process, ensuring quicker realization of business benefits while mitigating potential disruptions	