

#FABCONSQLCON2026

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ATLANTA MARCH 16 - 20, 2026



Building an AI-Ready Data Platform: Data Agents, Ontology, and Governance in Microsoft Fabric

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Agenda

- 1** Sonata Overview & Microsoft Credentials
- 3** Sonata's Unique Approach to solve business problems
- 5** Demo: Operationalizing AI with Ontologies & Data Agents

- 2** Key Trends & Challenges
- 4** Green Mountain Case Study

Key Highlights

**Demo: Fabric IQ-
Operationalize AI with
Ontologies & Fabric IQ**

**Sonata's Lightning Data
Suite Accelerator**

**Green Mountain
Technology Fabric Story**

Sonata Overview & Microsoft Credentials



Sonata at a Glance : A modernization engineering firm

39 Years
IT solutions provider

\$1.2B+
Revenue

6600+
Engineers across US,
EU, Asia & ANZ

Delivering Value

Digital Experience Platforms, AI/Data Platforms & Continuous Modernization



Sonata & Microsoft - **30+ Years** of jointly driving
Customer Success

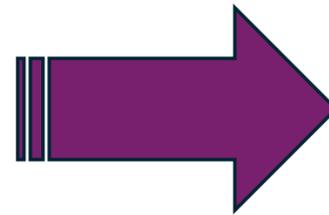


Launch Partner

Key Trends & Challenges in the Industry

The Reality

- Many organizations are excited about AI, but **data foundations and governance are not AI-ready**
- **Fragmented data and delayed insights** prevent AI from scaling beyond pilots
- Enterprises are **tool-rich but data-poor**, limiting business value

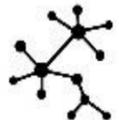
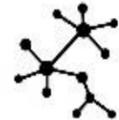


The Shift Required

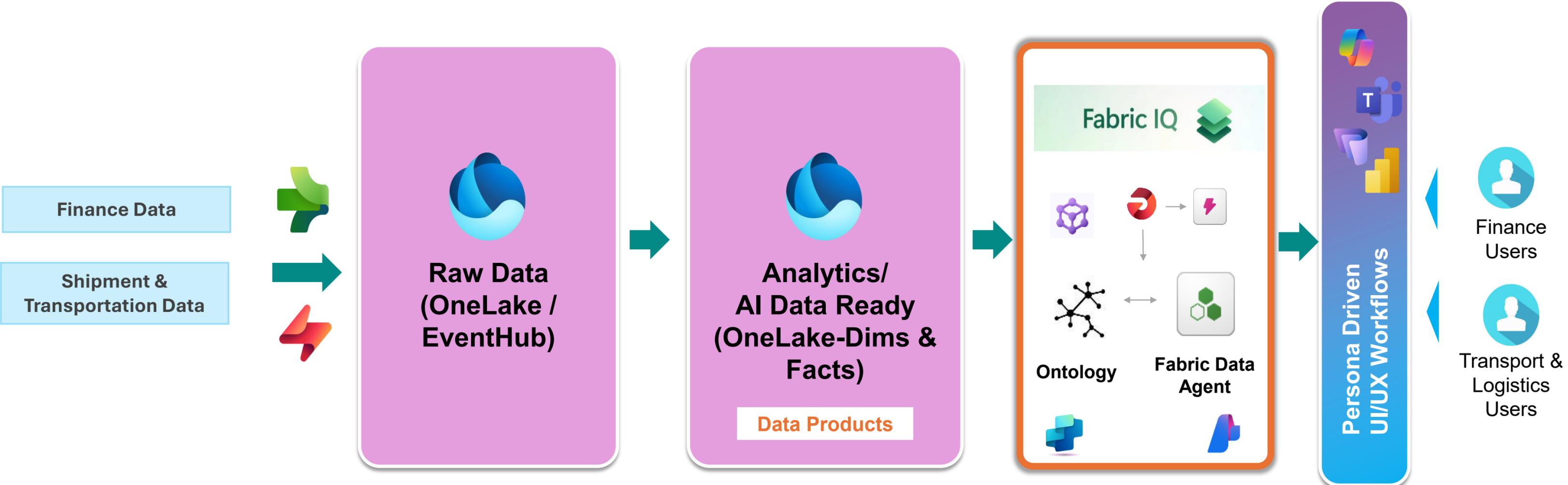
- From fragmented legacy data to **Unified, governed AI-ready platforms** (*Speed to value and product-driven data services*)
- From reactive dashboards to **Intelligent AI agents** (*Optimize labor and drive operational excellence*)
- From pilots to **Enterprise-scale AI outcomes** (*Accelerate revenue growth and expand partner ecosystems*)

AI success starts with a trusted data foundation- ***AI-Ready Frontier Data Platform***

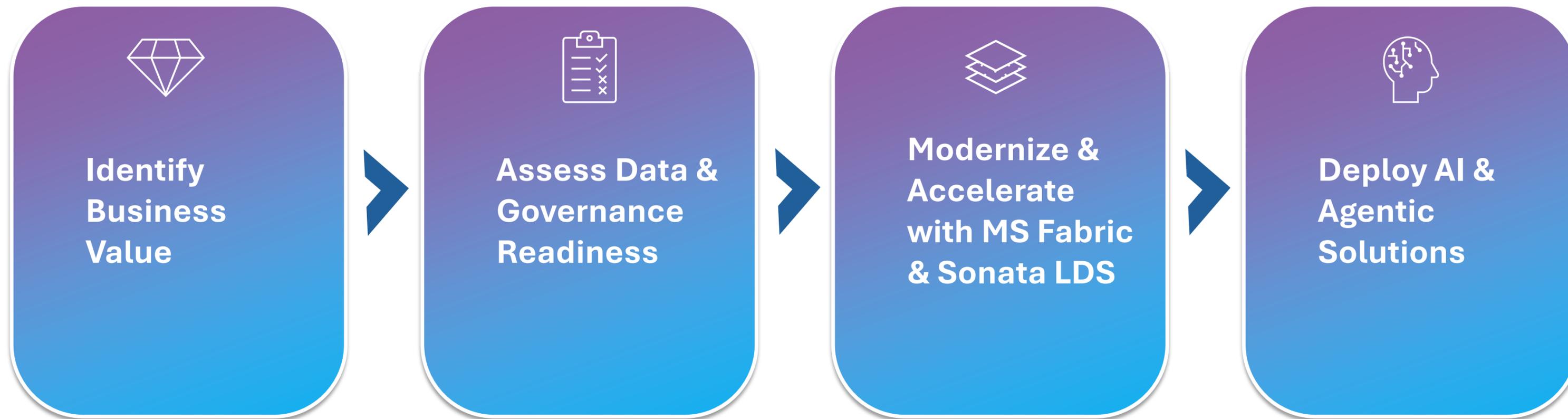
Industry Use Cases & Business Outcomes

#	Industry Use Case	Fabric Components	Business Outcomes
1	Revenue Risk & Shipment Intelligence	   	<ul style="list-style-type: none"> Accelerate revenue realization Reduce leakage Proactive risk management
2	Supply Chain Visibility & Delay Prediction	    	<ul style="list-style-type: none"> Operational excellence Faster decisions Improved service levels
3	Financial Reconciliation & Billing Insights	  	<ul style="list-style-type: none"> Optimize labor Faster reconciliation Speed to value
4	Partner Performance & Ecosystem Insights	  	<ul style="list-style-type: none"> Partner ecosystem expansion Improved collaboration
5	Workforce & Resource Optimization	  	<ul style="list-style-type: none"> Optimize labor Improve productivity Data-driven workforce planning

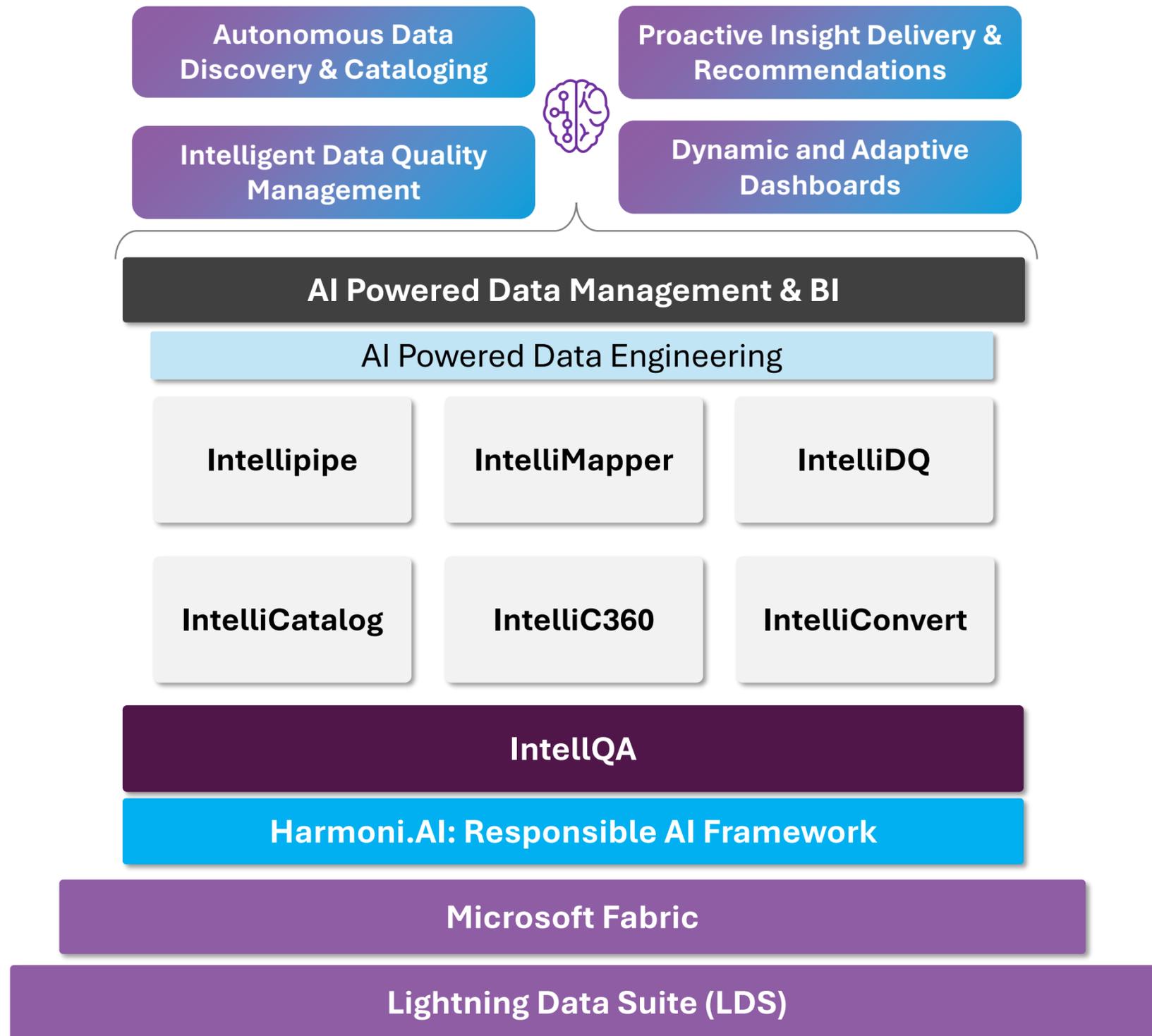
Operationalizing AI Through Data Agents and Ontologies



Sonata's Approach to Solve Business Problems using MS Fabric



What Sets Us Apart: The AI-Powered Lightning Data Suite (LDS)



Impact: 30 to 40% Faster Data Modernization

1. **IntelliPipe:** Automates data pipelines to reduce engineering effort and accelerate time-to-value.
2. **IntelliMapper:** An AI-powered accelerator that intelligently maps data schemas to slash effort and improve accuracy during migration.
3. **IntelliDQ:** AI-driven data profiling to assess the quality of the data, ensuring high data quality and mitigating migration risks.
4. **IntelliCatalog:** An AI-driven catalog that automatically discovers and governs data assets for easy discovery and compliance.
5. **IntelliConvert: A Powered Data Migration & Code Conversion Accelerator**
6. Leveraged **IntellQA** for the creation of Testcases, Test Data and Test scripts to improve the productivity



Green Mountain Technology Case Study

Speaker Introduction



Nirav "Nir" Patel | Chief Technology Officer



About:

- **Strategic Leader** driving transformation through modern platforms, unified data, and AI innovation.
- **CTO focused on scalable architectures** and simplifying legacy ecosystems for end-to-end visibility.
- **Champion of digital and business transformation**, making technology a true growth engine.
- **Proven impact leader** delivering profitable growth, market leadership, innovation, and great workplaces.

Company Overview



FY2025

Annual Customer Savings
\$541M

Average Customer ROI
1,577%

Annual Shipments Processed
1.6B

Annual Carrier Spend Managed
\$15B

Our Value Proposition
Enabling high-volume parcel and LTL shippers to optimize delivery performance and transportation spend through data-driven insights.

Who We Are
A technology-driven logistics intelligence platform helping shippers optimize logistics, reduce costs, and improve operational efficiency.

What We Do
We transform high-fidelity logistics data across clients and partners into actionable insights through our platform and industry expertise.

How We Do It
We act as an extension of our clients' teams to plan, execute, and continuously optimize parcel and LTL networks.

Select Notable Clients

Customer Case Study



Green Mountain Technology enables retailer to realize \$387M in net gain over 12 years

Background and Challenge

- 9 distribution centers, 1,000+ brick-and-mortar stores, 96,000+ employees, and booming eCommerce store
- Direct-to-consumer, vendor-direct-to-consumer
- Needed an omnichannel experience and curbside, in-store pickup solutions
- Primary carrier volume commitment with limited flexibility

Green Mountain Value Proposition

- Partnership Solution Implementation
- Carrier Utilization Expansion
- Advanced Reporting
- Optimization Opportunities Identified
- RFP Execution & Carrier Evaluation
- Carrier Contract Improvements

Green Mountain's Impact

\$32.2M

Average Annual Net Gain

\$387M

Lifetime Net Gain

(\$ in millions)

3,439%

Return on Investment

1,227

Strategic Deliverables

Client's Cumulative Savings



Business Transformation: Platform evolution for scalable growth



Purpose-built transition from a legacy, service-optimized stack to a cloud-native, data-centric, integration-ready platform designed for scalable growth, automation, and AI-driven decisioning.

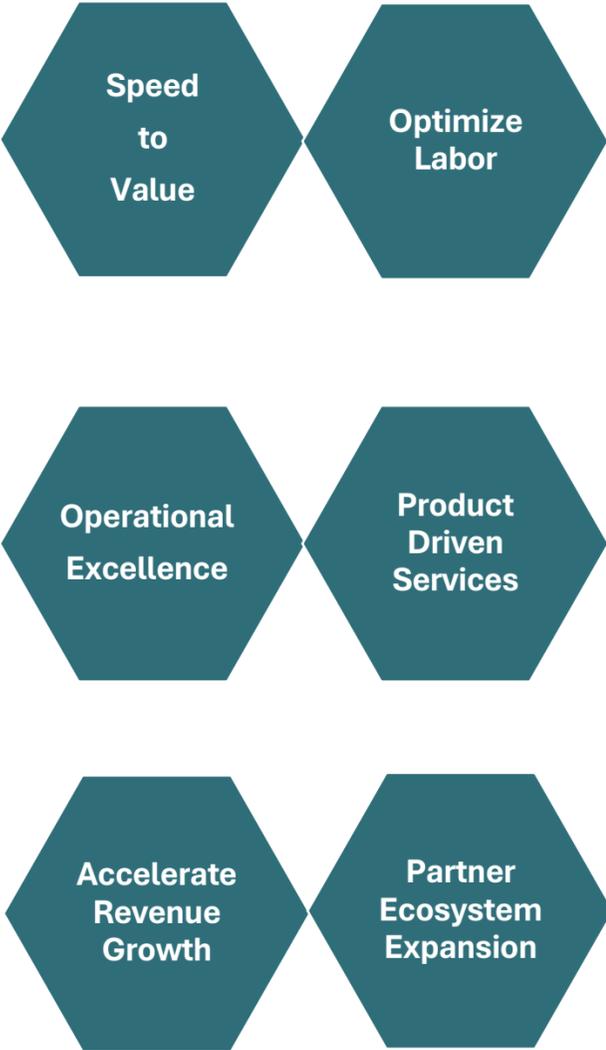
Objectives

- Core Systems Modernization
- Market Expansion
- Cost Efficiency & Profitability
- Enhanced Customer Experience
- Scalability & Flexibility

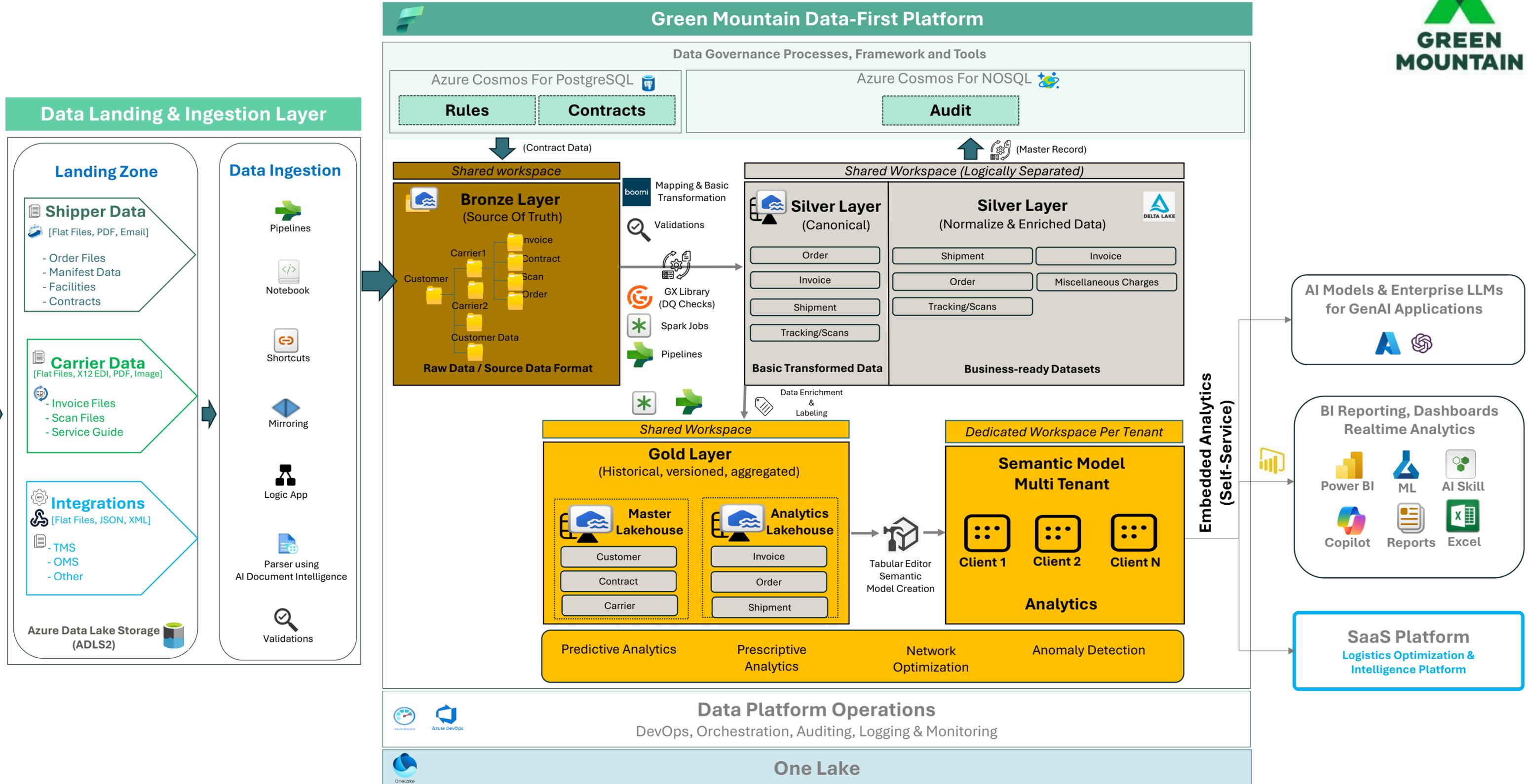
Digital Transformation Approach

- Solution Architecture**
 - UI/UX Modernization
 - Modular, domain-driven **microservices**
 - API-first design, Event-driven for scalable integrations
 - Self-service portal for shippers, carriers, Internal teams
 - SaaS Multi-tenant Solution
- Data Architecture**
 - Medallion Architecture: **Microsoft Fabric**
 - Semantic Layer for enhanced BI, reporting
 - One Lake for Real-time advisory analytics
 - AI/ML
- Infrastructure**
 - Full Cloud using Azure services
 - Scalable & Elastic Infrastructure
 - Enterprise-Grade Security

Business Outcomes



Data-First Architecture



AI-Powered Outcomes

Data Assets

1. Carrier Contracts & Pricing
2. Carrier Billing Invoices & Scans
3. Shipper logistics / order data
4. Analytics results
5. Re-rating simulation results
6. Spend metrics

Business Use Cases

Contract Loading	AI enabled carrier pricing setup and contract visibility	 
Data Ingestion & Transformation	Seamless invoice, order, scan data ingestion	 
Audit & Dispute Resolution	Exception workflow automation & anomaly detection	  
Re-rating Scenarios	AI orchestrated scenario modeling and advisory	   
Data Analytics Interpretation	Chatbot capable advisory & Self-Service data insights	   
Network Optimization & Predictive Analysis	What-If Analysis, Advisory & Self-Service Reporting	   

Business Outcomes

Self-Service Customer Experience

- ✓ AI-enabled real-time contract intelligence
- ✓ AI-assisted self-service reporting and analytics
- ✓ Conversational AI (Chatbot) for instant operational insights
- ✓ AI-ready Power BI analytics models
- ✓ AI-driven improvements in delivery reliability and exception reduction
- ✓ Improved delivery reliability, reduced exceptions, brand credibility

Agility, Productivity and Scale

- ✓ Faster scenario analysis and scalable, data-driven decisions across markets.

Operational Efficiency

- ✓ Enhance productivity, automation, faster decisions

Demo



Fabric IQ: Ontologies and Data Agents in Microsoft Fabric



The Modernization
Engineering Company

A stylized, futuristic graphic of a human head in profile, rendered in blue and black with glowing orange and red highlights, suggesting artificial intelligence or data processing.

LET'S DELIVER
DEEP IMPACT
WHEN IT
MATTERS MOST.
TOGETHER.

Thank You!

Sonata Software | Booth No. 918

Talk to us: partnerupdate@sonata-software.com

Sound off.
The mic is all yours.
Influence the product roadmap.

Join the Fabric User Panel



Share your feedback directly with our Fabric product group and researchers.

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Join the SQL User Panel



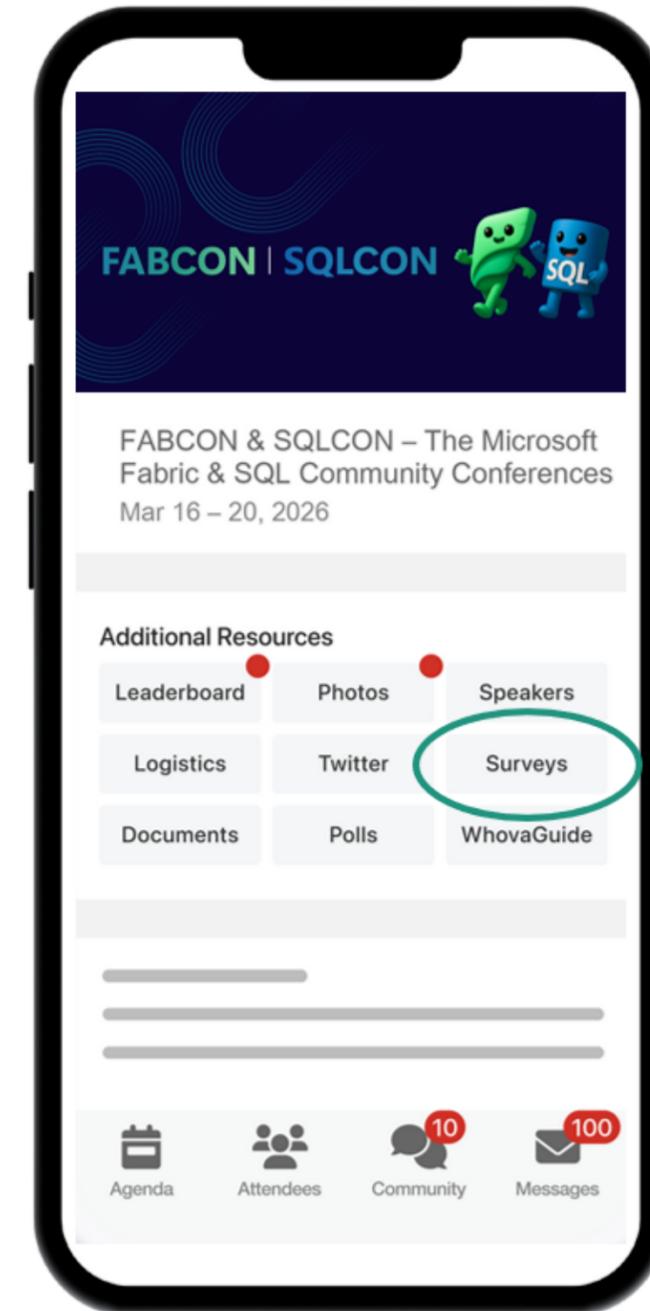
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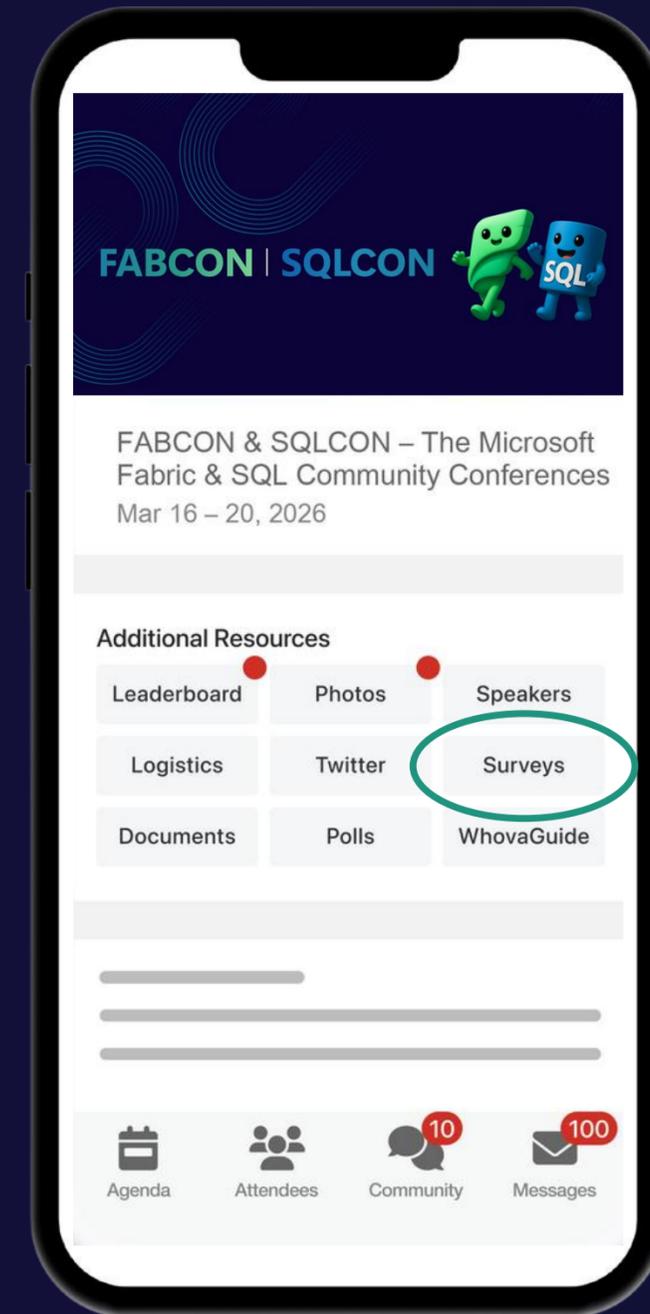
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