

# Maximizing Business Outcomes with Agentic AI

Transform Business Growth and Innovation with  
Microsoft Copilot Studio



# From automation to innovation

Artificial intelligence has come a long way in an incredibly short time. What began as simple chatbots with scripted responses has evolved into sophisticated agents that transform how businesses operate and engage with their customers.

Today's organizations require intelligent systems capable of understanding context, learning from interactions, and delivering personalized experiences at scale. Agents are now enhancing critical business operations by streamlining processes, automating routine tasks, and providing valuable insights that drive decision-making.

**Companies that leverage agents are transforming interactions from transactional to transformational. Each exchange becomes a chance to learn and improve outcomes. These AI assistants work across your organization to drive innovation, solve challenges, save time, and enable collaboration at unprecedented scales.**



Building on the strengths of generative AI, Microsoft Copilot Studio gives you a low-code platform to create agents that integrate seamlessly with your business systems. Build agents by simply describing what you want in natural language, or use the visual editor with drag-and-drop functionality to enhance your workflows with intelligent automation that works where you do.

**In this e-book, we'll explore how organizations can embrace low code with Copilot Studio to make agent development more accessible and to drive measurable business outcomes.**



# AI agents: What are they, and what can they do?

Agents range from simple, rule-based chatbots to sophisticated, autonomous programs.

A basic agent might respond to customer or employee queries by following a set of predefined rules. Its responses are limited to frequently asked questions, and it acts only based on the direct prompts it receives.

A more complex agent can operate proactively to identify and act on opportunities to support an organization's business goals.

For example, it might continuously monitor supply chain data, such as inventory levels, supplier performance, and shipping delays, predicting potential disruptions using AI models. It can use machine learning to adapt to new trends, predict outcomes, and make real-time decisions that align with business goals.



**What are the key risks in  
our supply chain right now?**

**Primary risks include a delay in raw material shipments from supplier X, with an estimated delivery lag of 5 days. There's also a 12% increase in freight costs from logistics partner Y.**

**Would you like to explore alternative suppliers or shipping options?**

# How agentic AI is enhancing business operations

Agents have revolutionized enterprise operations by streamlining customer support, automating routine tasks, and enhancing user engagement—enabling a huge leap forward for businesses in terms of operational efficiency.

Since the 1960s, agent capabilities have gradually evolved in step with broader technologies, increasing their ability to handle complex queries and offer more personalized interactions.

**Now, as generative AI gains widespread usage and becomes part of organizational strategies, agents have evolved into intelligent virtual assistants, with greater contextual understanding.**



**Agents are designed to drive measurable outcomes across departments by:**

- > Accelerating innovation
- > Solving business challenges
- > Reducing time to value
- > Collaborating at scale



Today, organizations have an opportunity to increase the business value of their agents by expanding their uses.

On top of handling customer-facing queries, agents can supplement critical internal workflows, helping to:

- > **Accelerate innovation.** Agents can automate everyday business processes—data entry and processing, invoice processing, customer support, scheduling, inventory management, and more—so employees can spend more time on complex tasks, strategic initiatives, and innovative projects.
- > **Solve business challenges.** AI agents streamline decision-making with real-time data analysis and offer predictive insights that help teams address issues proactively. They also enable faster, smarter responses to shifting demands.
- > **Reduce time to value.** Quick agent deployment means accelerated time to market, eliminating lengthy development cycles. Agents continually learn from their interactions, improving performance over time.
- > **Collaborate at scale.** Low-code development can facilitate collaboration and communication among teams by providing real-time access to information, coordinating workflows, and fostering collaboration between departments—for instance, IT and finance.

Agents pull in relevant, up-to-the-minute information—from workplace applications, CRM and ERP solutions, the web, and other relevant data sources—and process it instantly, identifying trends, anomalies, and actionable opportunities.

This allows teams to make informed decisions on the spot, whether it's optimizing supply chain operations, improving customer engagement, or responding to market changes—without manual data gathering or delayed reporting.

# DIY AI: AI tools, created in-house

If you have ideas on how AI can enhance operations, reduce manual effort, and enable clearer decision-making, Copilot Studio can help you bring them to life.

**Building an agent can be done with a few clicks and no coding skills required.**

Users can tell Copilot Studio what they want their agent to do using natural language and easily choose which knowledge sources they'd like to integrate from across an organization's data—whether it's specific documents or entire databases.

This agent can be used by its creator, shared with a select group, or deployed to an entire organization.

Agents created in Copilot Studio vary in levels of complexity and capability. Foundational models that focus on information retrieval, summarizing information, and answering simple queries can be quickly built and deployed by anyone in the organization. More complex agents, that can operate independently, make decisions, and learn to improve and adapt, can also be created by makers with more experience.



Through native integration with tools like Microsoft Dynamics 365 and Power Platform, agents built in Copilot Studio can use real-time data from across the organization—like supply chain details from ERP systems, or customer interactions from CRM tools—while staying protected by Microsoft's comprehensive security, compliance, and governance capabilities.



Agents can interface seamlessly with third-party applications using APIs and connectors, ensuring that they can bridge multiple systems without requiring significant customization or development effort.

Agents built in Copilot Studio can access more than 1,400 data sources out of the box, including:

- SAP
- ServiceNow
- Workday
- Salesforce

Agents integrate with the Microsoft 365 suite, allowing users to interact with AI directly in the familiar tools they use daily.

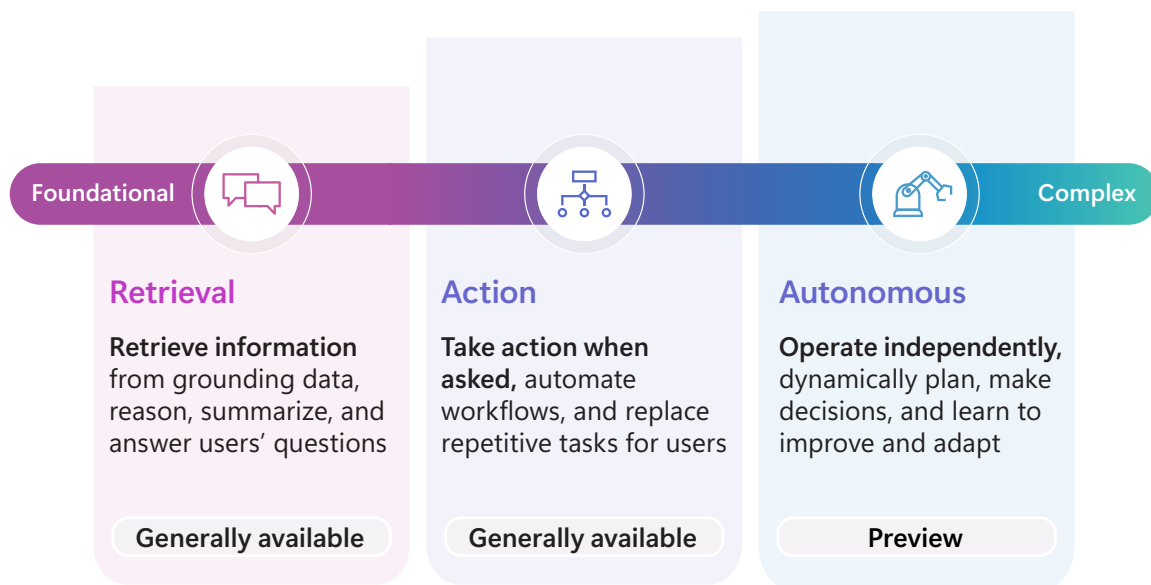
**Copilot Studio extends the value that customers receive with Copilot, creating more opportunities to enhance productivity within their existing work environment.**

## Copilot Studio in action

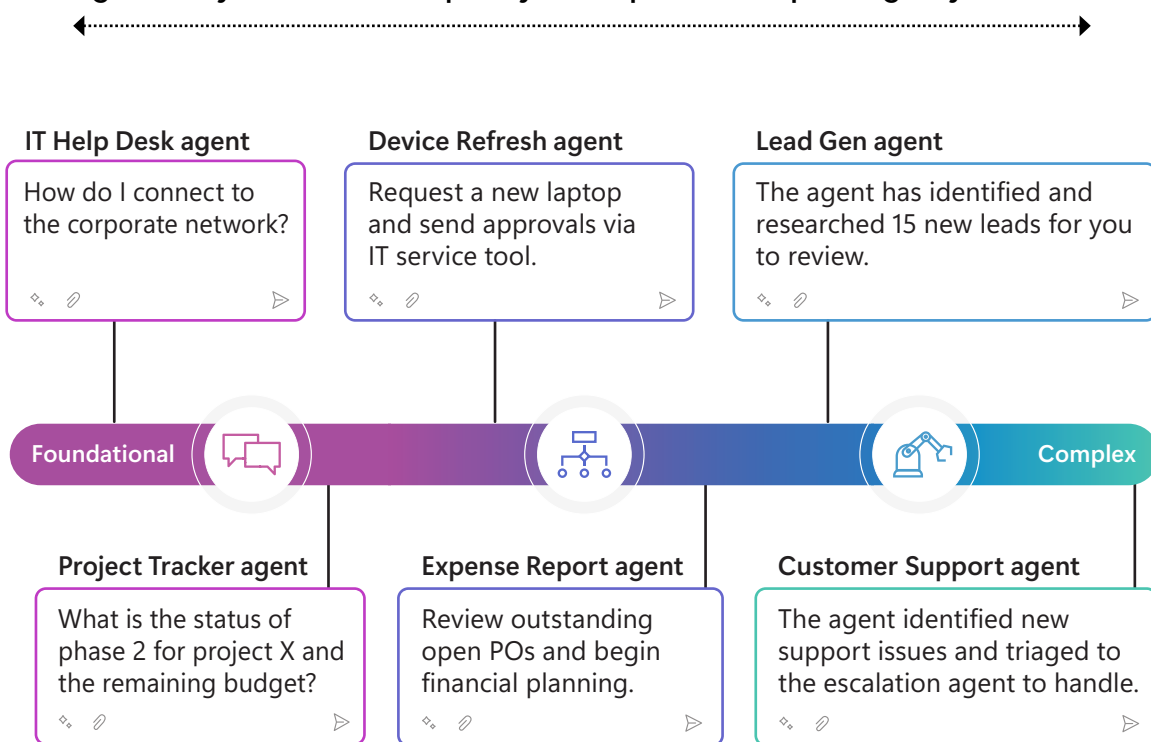
Interested in learning how easily Copilot Studio can realize your AI vision? Watch this video exploring the fundamentals of Copilot Studio, its features, and how it can enhance your organization-wide workflows.

# Spectrum of agents

Agents are AI assistants that can help optimize business processes and enhance productivity



Agents vary in levels of complexity and capabilities depending on your need





# AI for all:

## Agents enhance customer and employee experiences

### Agents for streamlining employee workflows

While automating routine tasks like data entry and reporting are valuable for any business, they're just the beginning with Copilot Studio.

### Sales and marketing teams

Sellers can spend less time researching leads or combing through existing pipelines—freeing time for quality interactions. Agents complete routine tasks like sending automated emails, scheduling meetings, and surfacing top priorities.

### Finance teams

Agents automate purchase orders, track invoicing, and suggest cost savings and route requests efficiently, freeing finance leaders for more high-impact work.

### Customer service teams

Agents comb vast amounts of data, route tickets intelligently, and analyze real-time customer sentiment. They can keep systems of record up to date, gauge customer intent, solve issues using knowledge gleaned from team members, and reduce case-handling times.

### IT teams

Agents can complete network health checks and monitor systems to identify and address potential issues before they cause disruption. And agents empower IT teams with predictive analytics that can forecast capacity demands and optimize resources.

### HR teams

Reduce cost-per-hire with agents that can help streamline hiring processes by writing job descriptions, drafting communications, and addressing FAQs within the organization.



**See how easily an agent is created to handle internal questions about vacation allotment—using references to established organizational documents as well as personalized, individual information.**

## **Agents for elevating customer experience**

With just a few clicks, users can create an agent and embed it into your organization's customer-facing website. Its agentic AI capabilities allow your customers to have comprehensive, multi-turn conversations where they're guided to the appropriate solution.

For example, consider a scenario where your organization has analyzed its incoming support topics and identified that a large portion of customer issues relate to store hours and shipping issues. Your team members can quickly and easily build an agent around those topics and help customers gain answers without initiating a request to a human representative.

Agents can also be integrated with services and network systems out of the box or through hundreds of custom connectors using Power Automate. If a customer makes a request that the agent isn't equipped for, the agent can escalate the conversation by passing it, and its details, to a live representative. Now the representative has the necessary details and context to avoid needing to recapture information from the customer.

It's a simpler path to smoother, more effective customer interactions.

**How many customer support tickets are unresolved?**

**There are currently 42 unresolved customer support tickets. 10 are classified as high priority, 20 as medium, and 12 as low. The average response time is 4 hours. Would you like me to assign more resources to address the high-priority tickets?**



# Scaling AI success




Beyond streamlining existing workflows and engaging with customers on current issues, Copilot Studio enables organizations to innovate at scale.

Teams can quickly adapt custom agents to meet changing business requirements, ensuring that their AI-powered tools evolve alongside their organization's shifting goals and processes. This adaptability not only boosts short-term performance but also contributes to long-term business growth by making operations more agile, intelligent, and aligned with strategic objectives.

## Start with the fundamentals of AI

Building and implementing agents can be done quickly and easily across the organization—when team members are given the appropriate educational resources. Learning about the **fundamentals of generative AI** is a great place to start.

With a better understanding of how generative AI enables the creation of agents, users can:

-  Understand generative AI's place in the development of artificial intelligence
-  Understand language models and their role in intelligent applications
-  Describe examples of agents and effective prompting



Not only can users learn to build and update agents to suit their evolving business requirements, but agents can also evolve through continuous self-learning and improvement. AI-powered self-learning features enable agents to independently improve over time, resulting in more accurate and effective responses.

Empowering teams to create and refine AI agents can dramatically boost an organization's ability to innovate. This approach not only delivers immediate operational value but sets the stage for continuous improvement and strategic growth, ensuring your enterprise stays at the cutting edge in its field.

# Balancing AI innovation with regulatory and ethical considerations

When innovating with new AI tools, organizations may consider establishing a framework to ensure compliance, privacy, and operational readiness. Consider these points to get started:



**Data privacy and security:** Ensure AI models comply with data protection regulations and safeguard personal data through encryption, anonymization, and strict access controls.



**Ethical use and bias mitigation:** Establish clear guidelines to prevent bias in AI-generated outputs, ensuring fairness and inclusivity, and avoiding harmful or unethical applications.



**Transparency and accountability:** Maintain clear documentation on how generative AI systems make decisions, providing traceability, auditability, and responsibility for AI-driven outcomes.



**Regulatory compliance:** Adhere to industry-specific regulations, such as healthcare (HIPAA) or finance (SOX), and continuously monitor the evolving legal landscape to ensure AI systems remain compliant.



**Security and risk management:** Implement robust cybersecurity measures to protect AI models from adversarial attacks, data breaches, or malicious manipulation of generated content.



**AI governance framework:** Create an AI governance structure with policies and best practices that ensure responsible use, periodic audits, and updates to align with business and regulatory requirements.



**Operational readiness and training:** Prepare teams for seamless integration of AI, including training for employees on compliance risks, privacy protocols, and effective use of AI tools to ensure alignment with organizational goals.



# It's easy to create AI tools, safely

When developing AI tools, it's important to establish a principled and actionable framework that ensures organizations develop and deploy AI responsibly.

The generative AI within Copilot Studio is designed to align with Microsoft's responsible AI principles:



Fairness



Reliability and safety



Privacy and security



Inclusiveness



Transparency



Accountability



Copilot Studio is part of Microsoft's broader effort to put **Microsoft AI principles** into practice around its generative AI tools. Microsoft's aim is to provide insights into the workings of AI technology, the decisions that can affect its performance and behavior, and the significance of considering the entire system—including the technology, people, and environment.



Ensuring data security is a large part of this initiative. As such, Copilot Studio is:



Federal Risk and Authorization Management Program (FedRAMP) certified for government entities  
[> Learn more](#)



Health Insurance Portability and Accountability Act (HIPAA) and Health Information Trust Alliance (HITRUST) certified for healthcare organizations



Payment card industry (PCI) compliant to handle transactions in payment scenarios



Built with additional certifications, including System and Organization Controls (SOC), multiple International Organization Standards (ISO), and many more compliance offerings



# Customized agentic AI is transforming business outcomes

The world's leading businesses are leveraging Copilot Studio's customized AI agents to unlock new levels of efficiency, agility, and innovation—paving the way for smarter, faster decision-making and measurable growth.

**“We are using Microsoft Copilot Studio to build a copilot for HP’s customer-facing website to engage customers at scale and educate them on the right products for their needs, and more. The better we communicate about our products, the more trust and business opportunities we can create.”**

Mohamed Zohny  
Global Head of Social Media  
& Digital Innovations, HP

> [Learn more about HP’s Copilot journey](#)



**“We believe that our Maker community is poised to expand rapidly as we leverage the generative AI capabilities in Power Platform. The CoE team is pouring effort and attention into this opportunity and embracing the limitless potential it is unlocking.”**

Richard Blackwell,  
Head of Employee Experience Engineering,  
Standard Bank

> [Explore how Copilot is supporting Standard Bank](#)

**Pacific Gas and Electric Company (PG&E) built a copilot which today manages 25%–40% of all employee calls.**

**These optimizations save the company more than \$1.1 million annually.**



## Conclusion

# The future of agentic AI is even more intelligent, intuitive, and integrated

As AI evolves, custom agents will not only automate tasks but also anticipate needs, adapt to individual user preferences, and collaborate across departments. The next generation of copilots will empower teams to solve more complex challenges, faster.

The combination of AI and a low-code strategy is key, transforming employees at all levels into creators of innovation and agility. Agentic AI is the cornerstone of a holistic low-code strategy, but the full picture includes powerful workflow automation, data integration, and customizable app development.

Copilot Studio enables this rapid creation and deployment of complex AI agents, without requiring heavy coding expertise, creating a future where business transformation is both faster and more accessible.



## The future looks productive

**70%** of digital and marketing communications will use AI avatars leveraging text to video through GenAI technology by 2025, up from less than 1% in 2022<sup>1</sup>

**50%** of agentic AI software will include proactive intelligence capabilities by 2026, up from less than 5% in 2023<sup>1</sup>

**50%** of various knowledge worker tasks will be augmented by AI, such as ideation, information gathering, and reporting by 2027, up from 0% in 2023<sup>1</sup>

<sup>1</sup> 'Emerging Tech: Use Generative AI to Transform Conversational AI Solutions,' Gartner, Inc., July 3, 2024