



Concentrix Professional Services

Agentic AI - Finance Workflow Automation

Close books by Day 3 instead of Day 10. Built with Microsoft Copilot Studio and Power Automate, our agents automate the month-end close process—from chasing department submissions to final CFO package. Your data stays in your environment. Your IT stays in control.

What is Agentic AI?

AI agents built with Microsoft Copilot Studio that DO the work, not just chat about it:

Tier 1 - Knowledge (\$15K, 4 weeks): AI answers finance queries, provides report snapshots, surfaces variances from SharePoint. Automates 20-30% of information lookup. Deploys to SharePoint.

Tier 2 - Actions (\$75K, 6 weeks): AI performs reconciliations, updates spreadsheets, generates reports via Power Automate. Deploys to Teams and SharePoint. Automates 40-60% of routine tasks.

Tier 3 - Workflows (\$150K, 12 weeks): AI manages entire close process end-to-end, handles exceptions, provides audit trail. Automates 60-80% of operations. Full ERP integration.

The Finance Workflow We Automate

Step	What the Agent Does	Tools Used
1. Chase Submissions	Power Automate sends emails to 12 department heads on Day 1. Tracks submissions. Escalates to managers if missing.	Outlook, SharePoint, Teams
2. Collect Files	Monitors 12 SharePoint folders. Pulls files to staging when they appear. Validates formats.	SharePoint, Power Automate
3. Consolidate Data	Merges all division Excel files	Power Automate, Excel

Step	What the Agent Does	Tools Used
	into master workbook. Handles different formats automatically.	
4. Reconcile	Compares actuals to GL. Flags variances over 5%. Creates exception list with details.	Power Automate, ERP, Excel
5. Generate Package	Creates close report with AI commentary. Updates Power BI. Generates audit log.	Copilot Studio, Power BI
6. Submit & Close	Emails CFO package. Updates tracker to Complete. Done by Day 3.	Outlook, SharePoint, Teams

Why Agents Fail in Most Organizations

Most companies struggle with AI agents for 5 reasons. We help organizations address each one:

1. Content & Data Issues

- Problem: GL data is messy. Chart of accounts inconsistent. Master data has duplicates. Financial documentation scattered across SharePoint with no structure.
- Our approach: We clean your GL, standardize CoA, deduplicate master data, organize financial docs for AI consumption. Your agent works because the foundation is solid.

2. Wrong People & Processes

- Problem: Teams try to keep doing exactly what they did before, but "with AI". Analysts don't trust the agent. No clear process for handling exceptions.
- Our approach: Change management programs. Train analysts on new workflow. Create exception handling playbooks. Paradigm shifts—you can't just bolt AI onto old processes.

3. Lack of AI Expertise

- Problem: IT doesn't know Copilot Studio. No one understands Power Automate connectors. Prompts are poorly written. No one monitors AI accuracy.
- Our approach: Microsoft-certified architects who've built 7,000+ agents. We write effective prompts. We test accuracy. We know what typically works.

4. Operations & Governance Gaps

- Problem: IT doesn't manage Microsoft 365 Admin, Power Platform Admin, or Azure properly. No governance. No security policies. No compliance framework.
- Our approach: We set up admin centers properly. Establish governance. Configure security. Build support processes. Your IT learns to manage Copilot at scale.

5. No Analytics or Monitoring

- Problem: Agent works 10 times, fails at scale. No visibility into usage, accuracy, or ROI. Can't prove value to CFO.
- Our approach: Power BI dashboards. Copilot Analytics. Track usage, accuracy, time savings. Prove ROI with data.

Important: 80% automation is typically achievable for most teams. 20% human review always needed for quality and edge cases. We help you set up that 20% properly.

Why Microsoft + Concentrix?

- Copilot Studio: Build agents with instructions, knowledge, actions, orchestration
- Power Automate: 1,500+ connectors, 15,000+ actions, pre-built finance workflows
- Azure AI: OpenAI and other LLMs with enterprise security, compliance
- Deploy Everywhere: Teams, SharePoint, Dynamics 365, Salesforce, ServiceNow, 20+ channels

Our Unique Credentials

- 400,000 Concentrix employees using AI daily for customer support and professional services
- 7,000+ agents in production today—practical applications, not marketing fluff
- 2,000+ enterprise clients in 70 countries trust us with AI transformation
- One of the few enterprise-grade, generative AI native applications at scale
- Microsoft Gold Partner with certified Copilot architects
- 2 years of data: We know which agents work, which don't, and why
- Agent library with templates—get to production faster and cheaper

Typical Outcomes

Based on implementations with mid-market and enterprise finance teams:

Faster close: Day 10 → Day 3-5 (varies by organization). Timeline depends on process maturity, data quality, number of entities.

Less manual work: 70-85% reduction (varies by team) on consolidation and reconciliation. Analysts focus on variance analysis.

Audit ready: Complete audit trail. Every step logged in SharePoint with timestamps.

Return on Investment Calculation

Enterprise Example: Mid-market company with 10 Financial Analysts

Current state: 10 analysts × 40 hrs/close × \$45/hr (2025 BLS median) = \$18,000/month

After automation: 10 analysts × 8 hrs/close (80% reduction) × \$45/hr = \$3,600/month

Monthly savings: \$14,400

Annual savings: \$172,800

Payback: \$150K ÷ \$172.8K = 10.4 months for Tier 3

Note: Typical enterprise: 15-50 analysts. Larger teams = faster ROI. Actual results vary significantly based on data quality, process maturity, IT readiness, team size, and organizational complexity. ROI calculations are estimates based on historical implementations and may not reflect your specific situation.

Our Proven Approach

Research (Weeks 1-2)

- Discovery: Map current close process across all departments
- Mapping: Identify bottlenecks, manual touchpoints, automation opportunities
- Requirements: Document ERP, Microsoft environment, integration needs
- Use Case Prioritization: Rank opportunities by ROI and complexity

Design (Weeks 3-4)

- Agent Configuration: Define instructions, knowledge sources, actions
- Integration Planning: Map connectors, plan Power Automate flows
- Success Metrics: Set targets for automation rate, time savings, adoption

Build (Weeks 5-8)

- Copilot Studio Setup: Configure agent, add knowledge, enable capabilities
- Connector Integration: Connect 1,500+ connectors, create workflows
- Knowledge Grounding: Link SharePoint, Teams, enterprise data with permissions

Test (Weeks 9-10)

- Functional Testing: Validate responses, knowledge retrieval, actions
- Performance Validation: Test concurrent users, response times, API limits
- Pilot Programs: Deploy to select teams, gather feedback, refine

Run (Weeks 11-12)

- Rollout: Deploy via Teams Admin, configure analytics, set limits
- Monitor Performance: Track usage, measure ROI, monitor costs
- Optimize: Update instructions, add knowledge, expand connectors

Support (Ongoing)

- Admin Controls: Manage access, monitor costs, enforce governance
- Continuous Enhancement: Add capabilities, expand to departments, integrate connectors
- Scale: Replicate across regions, add autonomous capabilities, leverage new models

Beyond Building Agents

Building the agent is 30% of success. The other 70%:

Enablement & Training

- Get ready: Select departments, identify success team, target critical mass
- Onboard: Train with Copilot Prompt Gallery, deploy champions, make training standard
- Deliver impact: Review success with Dashboard, quantify ROI, build momentum
- Extend: Identify new scenarios, transform processes, reward success

Governance, Security & Compliance

- Get ready: Perform M365 Copilot Optimization Assessment, address data security

- Onboard: Prepare M365 with Setup Guide, ensure data controls, deploy M365 apps
- Deliver: Mature AI management through improved IT service, establish management plan
- Extend: Provide insights on service health, design/build/publish plugins, build custom agents

Ready to Transform Finance?

Book a 30-minute assessment to see your specific automation roadmap and ROI projection.

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