



Concentrix Professional Services

Agentic AI - IT Workflow Automation

Resolve tickets in 2 hours instead of 2 days. Built with Microsoft Copilot Studio and Power Automate, our agents automate the ticket resolution process—from ticket intake to resolution. 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 IT questions, provides KB articles, surfaces solutions from SharePoint. Automates 20-30% of information lookup. Deploys to SharePoint.

Tier 2 - Actions (\$75K, 6 weeks): AI troubleshoots issues, runs diagnostics, escalates complex cases via Power Automate. Deploys to Teams and SharePoint. Automates 40-60% of routine tasks.

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

The IT Workflow We Automate

| Step | What the Agent Does | Tools Used |
|------------------|---|-----------------------------------|
| 1. Ticket Intake | User submits ticket via Teams, email, or portal. AI captures details, validates completeness. | Teams, SharePoint, Power Automate |
| 2. Categorize | AI reads description, assigns category (password, access, software, hardware). Sets priority. | Azure AI, Copilot Studio |
| 3. Check KB | Searches knowledge base for similar issues. Suggests solution if | SharePoint, Azure AI |

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| | found. Auto-resolves simple cases. | |
| 4. Troubleshoot | For complex issues, AI runs diagnostics, checks logs, tests configurations remotely. | Azure, Copilot Studio |
| 5. Route/Escalate | If needed, assigns to specialist with context. Provides summary, suggests next steps. | ServiceNow, Teams, Power Automate |
| 6. Close & Learn | Updates ticket with resolution. Adds to KB for future reference. Measures satisfaction. | SharePoint, ServiceNow |

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: Ticket data is messy. Incomplete descriptions. Duplicate tickets. KB articles outdated across SharePoint with no structure.
- Our approach: We standardize tickets, deduplicate issues, update KB, organize documentation 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". IT staff don't trust the agent. No clear process for handling exceptions.
- Our approach: Change management programs. Train IT staff 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 CIO.
- 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 IT support 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 IT 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 ticket aggregation and ticket resolution. Specialists focus on root cause analysis.

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

Return on Investment Calculation

Enterprise Example: Mid-market company with 10 IT Support Specialists

Current state: 10 specialists × 30 tickets/day × 20 days × 20 min/ticket × \$24/hr (2025 BLS median) = \$48,000/month

After automation: 10 specialists × 30 tickets/day × 20 days × 4 min/ticket × \$24/hr (80% reduction) = \$9,600/month

Monthly savings: \$38,400

Annual savings: \$460,800

Payback: \$150K ÷ \$460.8K = 3.9 months for Tier 3

Note: Typical enterprise: 30-100 IT support staff. 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 IT?

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

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