Concentrix Professional Services

Agentic AI - Legal Workflow Automation

Review contracts in 2 days instead of 5. Built with Microsoft Copilot Studio and Power Automate, our agents automate the contract review process—from intake to final approval. 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 legal questions, finds precedents, surfaces clause language from SharePoint. Automates 20-30% of information lookup. Deploys to SharePoint.

Tier 2 - Actions ($75K, 6 weeks): AI extracts terms, flags risks, routes to appropriate attorney via Power Automate. Deploys to Teams and SharePoint. Automates 40-60% of routine tasks.

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

The Legal Workflow We Automate

Step	What the Agent Does	Tools Used
1. Contract Received	Email arrives with contract attachment. Power Automate detects and saves to SharePoint.	Outlook, SharePoint, Power Automate
2. Extract Terms	AI reads contract, pulls key terms: value, duration, obligations, liability caps, IP rights.	Azure AI, Copilot Studio
3. Risk Analysis	Compares terms to playbook. Flags non-standard clauses, missing protections, high-risk	Copilot Studio, SharePoint

Step	What the Agent Does	Tools Used
	language.	
4. Route for Review	Assigns to appropriate attorney based on contract type, value, complexity. Sets deadline.	Power Automate, Planner
5. Generate Redlines	AI suggests revisions for flagged terms using approved playbook language.	Word, Copilot Studio
6. Track & Notify	Updates status dashboard in SharePoint. Notifies business owner of progress.	SharePoint, Teams, Outlook

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: Contract templates inconsistent. Clause library outdated. Playbook not digitized. Precedents scattered across shared drives across SharePoint with no structure.
- Our approach: We digitize your playbook, standardize clause library, organize precedents, make everything AI-searchable 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". Attorneys don't trust the agent. No clear process for handling exceptions.
- Our approach: Change management programs. Train attorneys 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 General Counsel.
- 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 legal 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 legal 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 term extraction and contract review. Paralegals focus on risk analysis.

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

Return on Investment Calculation

Enterprise Example: Mid-market company with 5 Paralegals

Current state: 5 paralegals × 40 hrs/week on contracts × $29/hr (2025 BLS median) = $24,167/month

After automation: 5 paralegals × 10 hrs/week (75% reduction) × $29/hr = $6,042/month

Monthly savings: $18,125

Annual savings: $217,500

Payback: $150K ÷ $217.5K = 8.3 months for Tier 3

Note: Typical enterprise: 10-30 paralegals + attorneys. 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 Legal?

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

Guillermo Zuniga
Agentic AI Expert
guillermo.zuniga@concentrix.com

Todd Folsom
Concentrix Services Manager
todd.folson@concentrix.com

Web: https://www.concentrix.com/services-solutions/agentic-ai/

Phone: +1-800-747-0583