Agentic AI - Sales Workflow Automation

Capture every call detail in 5 minutes instead of 30. Built with Microsoft Copilot Studio and Power Automate, our agents automate the post-call admin process—from call transcription to CRM updates. 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 sales questions, finds collateral, surfaces pricing info from SharePoint. Automates 20-30% of information lookup. Deploys to SharePoint.

Tier 2 - Actions ($75K, 6 weeks): AI generates quotes, schedules meetings, scores leads via Power Automate. Deploys to Teams and SharePoint. Automates 40-60% of routine tasks.

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

The Sales Workflow We Automate

Step	What the Agent Does	Tools Used
1. Call Recorded	Teams captures sales call automatically when rep clicks Record.	Teams, SharePoint
2. Transcribe	Teams native transcription converts audio to text. No third-party tools needed.	Teams, Power Automate
3. Extract Details	AI reads transcript, pulls out: needs, budget, timeline, objections, next steps.	Azure AI, Copilot Studio

Step	What the Agent Does	Tools Used
4. Update CRM	Populates Dynamics 365 opportunity fields. Updates stage, next step date.	Dynamics 365, Power Automate
5. Create Tasks	Sets follow-up tasks in Planner based on what was agreed. Assigns deadlines.	Planner, Power Automate
6. Confirm	Sends summary to rep via Teams. Rep reviews in 5 min, approves, done.	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: CRM data is messy. Duplicate contacts. Inconsistent field usage. Call recordings scattered across SharePoint with no structure.
- Our approach: We clean your CRM, deduplicate contacts, standardize fields, organize call recordings 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". Sales reps don't trust the agent. No clear process for handling exceptions.
- Our approach: Change management programs. Train sales reps 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). Time depends on call complexity, CRM state, rep adoption.

Less manual work: 70-85% reduction (varies by team) on consolidation and reconciliation. Reps focus on selling, not admin.

Audit ready: Complete call history. Every detail captured in Dynamics 365 with AI confidence scores.

Return on Investment Calculation

Enterprise Example: Mid-market company with 10 Sellers

Current state: 20 reps × 10 hrs/week on post-call admin × $35/hr (2025 BLS median for Sales Rep) = $7,000/week = $30,333/month

After automation: 20 reps × 2 hrs/week on post-call admin (80% reduction) × $45/hr = $1,400/week = $6,067/month

Monthly savings: $24,266

Annual savings: $291,200

Payback: $150K ÷ $172.8K = 6.2 months for Tier 3

Note: Typical enterprise: 30-100 sales reps. 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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