



The AI Agents Blueprint

How to get started and see results fast



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Past the demolition, into deployment

The demo phase is over. Most leaders understand what agents are. Putting them to work inside a real enterprise is a different problem, and one many organisations are still working through.

The reason: deploying agents in an enterprise is harder than the demos suggest. Most IT environments aren't clean. They're weighed down by legacy systems, fragmented data, custom identity rules and years of accumulated technical debt. Agents have to land inside a reality that's often far removed from the version that fits in a pitch deck.



For most of the market, deployment stalls on three unresolved questions:



1. Will this connect to the systems we already run?

Pre-built agents often assume a clean environment. Real enterprises don't have one. Without a clear picture of how an agent will plug into what you already run, the initial deployment stalls before it can prove its value.

2. How does IT stay in control?

For IT leaders, this is non-negotiable: how do you maintain governance, oversight and data boundaries as agents multiply across the organisation? Solutions on the market vary widely in transparency, governance and the amount of control IT retains as deployment scales.

3. Will this deliver real ROI?

Or will it turn into a costly project that needs heavy customisation and a six-month build before anyone sees a return? Leaders want measurable outcomes tied to work that happens today, not a roadmap to value somewhere in the future.

The organisations seeing real results have moved past experimenting with agents. They're deploying them inside ecosystems built for control, integration and measurable return. This guide is for the IT and business leaders driving that work. It walks through where agents fit, where to start deliberately and what an ecosystem built for enterprise scale looks like.

What agents actually do

AI chatbots answer. Agents act. That distinction sets the right expectations for what you're deploying and what your people remain responsible for. Within the boundaries your people set, agents do three things in sequence:

Assess

the incoming context, whether that's a customer request, an exception in a process or a freight invoice that just hit an inbox.

Reason

through the next action based on rules, business logic and the data they can access.

Act

by drafting, summarising, routing or executing, then return outputs for human review or approval.



02

What separates an agent from a traditional, deterministic workflow is the combination of reasoning and action. Workflows follow a fixed script – useful for predictable, repeatable steps. Agents determine the right action dynamically from context, and can call on workflows when consistency matters. The two work together.

Agents carry the repeatable, rules-driven work so your people can focus on the judgement calls, exceptions and strategic decisions that require them. People set the guardrails, approve outputs, handle exceptions and own the work the business depends on.



How PwC turned platform consolidation into USD 150M

Across 136 countries, PwC has saved **USD 150 million** in time through Microsoft 365 Copilot, with custom HR and IT support agents built in Copilot Studio now running globally.

[Read the full story](#)

03

The processes that pay off first

Not every business process is a strong first candidate.
The agents with the fastest payoffs share four traits:

1. Touches multiple roles or teams

Value compounds when more than one person depends on the same process, because every user gets time back from the same agent.

2. Predictable outcome

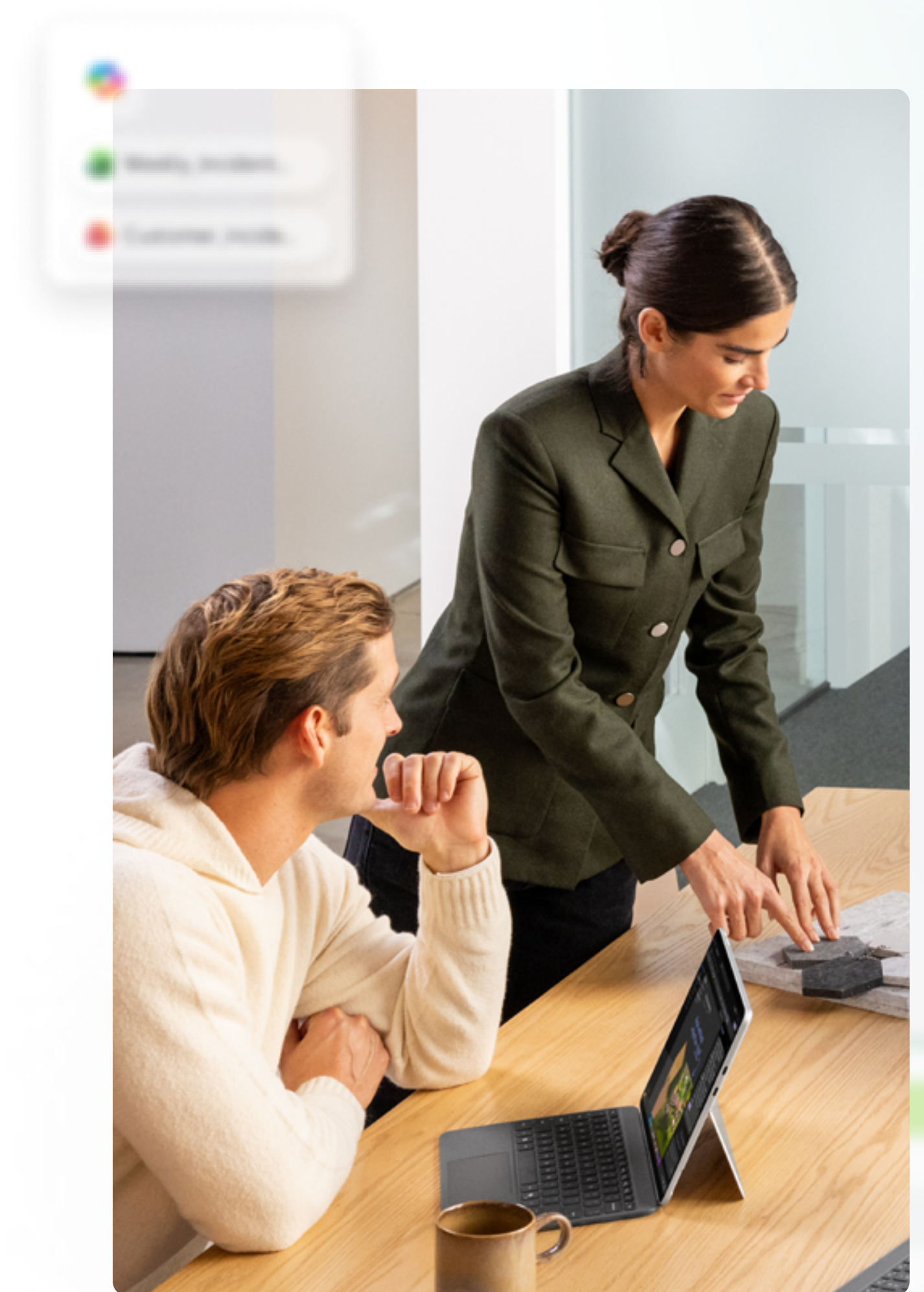
The right answer follows clear rules, which makes the agent's output easy to validate.

3. Low change-management overhead

Adoption doesn't require new behaviours, retraining or process redesign. People do the work the way they already do it, with help.

4. Inside systems your teams already use

No new tools to learn, no new logins, no migration project hiding inside the AI project.



When you screen business processes against these four traits, a set of starting points consistently rises to the top across organisations:

Document processing and finance workflows

Invoices, forms and purchase orders follow predictable rules and pass through multiple hands. Agents extract the data, validate it against your ERP, flag exceptions for review and route the clean ones for approval, turning a multiday cycle into a same-day one.

Employee onboarding and access management

A new hire kicks off the same sequence every time: provision accounts, assign licences, enrol in benefits, schedule orientation and notify the manager. Agents run the sequence across HR, IT and identity systems, and surface only the steps that need a human decision, like non-standard access requests.

Sales and account updates across systems

A rep closes a deal in CRM, and the same update needs to land in forecasting and finance. Usually, that means manual rekeying or a missed handoff. Agents propagate the change across systems, confirm it landed where it needed to and flag conflicts before they become reporting errors.

Employee support and IT triage

Password resets, policy lookups, device issues and benefits questions. Agents handle the high-volume, low-complexity requests inside your service portal, resolving what they can, escalating what they can't and learning from both.

The right starting point earns the first win. The ecosystem you choose turns it into a pattern.



Build your first agent in Copilot Studio

Dow puts agents to work on its multibillion-dollar logistics spend

Dow built two supply chain agents in Microsoft Copilot Studio to flag freight invoice discrepancies and process PDF invoices around the clock. The company projects **millions in savings in year one**.

[Read the full story](#)

Start deliberately. Scale without losing the thread.

The fastest path to organisational capability isn't moving fast – it's moving deliberately. Trust scales one proven deployment at a time, and the sequence below is how IT teams build that trust without taking on risk they can't manage.

Step 1. Start where the environment is ready

Turn on a pre-built agent for a process where data, identity and access are already in good shape. Capture value in days, not quarters. Pre-built agents are already built into Microsoft 365 apps your teams use every day – like Facilitator in Teams – and additional agents from the Microsoft Agent Store can be deployed through existing admin controls. Either way, IT starts from a governed path instead of creating one from scratch.

Step 2. Build for what's specific to the business

Identify one or two processes where friction shows up most often. Build a custom agent for them, with business and IT shaping it together. Business brings the process knowledge; IT brings the data and identity model. Use plain language, grounded in the data the process already depends on.

Step 3. Scale with what you've established

As trust builds and ROI is proven, expand across functions. Scaling agents adds real complexity: more integrations, more identity edge cases and more surface area to govern. That's where a centralised control plane becomes critical – giving IT visibility, a consistent governance model and the ability to scale deployments while maintaining control.

The work is led by IT and collaborative by design

Business users identify the friction because they live in the processes. IT owns the deployment because they own the data, identity, security and governance that the agents depend on. When IT is in the driver's seat, they can shape the strategy, set the guardrails and make the calls about what scales.

The deliberate path lets you move further, and the ecosystem you start on determines how far the approach can go – including a growing network of partners who build and publish agents directly to the Copilot Agent Store.



Morningstar gives advisors back a day a week

Morningstar advisors were spending 20–30% of their day on operational work. Grounding agents in Morningstar's own research data through **Copilot Studio shifted that work from hours to minutes.**

[Read the full story](#)

The ecosystem makes it real

Microsoft 365 Copilot and agents

Agents are part of Microsoft 365 Copilot. They sit alongside the AI models, security controls and platform services that make Copilot the AI platform built for work.

Copilot supports your people in the flow of work. It helps them understand, decide, draft and act inside Word, Excel, PowerPoint, Outlook and Teams. Agents extend that same system further, taking on repeatable, multistep processes that run across tasks, tools and teams, with people in the loop where judgement is needed. Together, they remove the manual handoffs, missed steps and waiting time that slow work down.



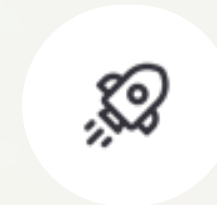
Deploying AI consistently across a real enterprise requires a platform built for it.

Microsoft 365 Copilot brings three capabilities together to do exactly that.



Connects to the systems you already run

In [Microsoft 365](#), agents reach the data, tools and systems your teams already use through governed connectors and admin-managed policies. Copilot Studio supports 1,400+ connectors, and Microsoft pre-built agents, partner-built agents and your own custom agents all show up where work happens: inside Microsoft 365 applications, and the line-of-business apps your teams open every morning.



Deploys pre-built and custom agents for any kind of work

[Microsoft Copilot Studio](#) is the native AI agent platform for Copilot. Teams use an intuitive, plain-language building experience to create agents across the full spectrum – from deterministic workflows that need to run the same way every time, to autonomous agents that reason through novel situations. Agents built on other clouds can also be brought into the Microsoft 365 environment, so prior investments continue to pay off.



Provides the control plane for every agent

[Microsoft Agent 365](#) is the control plane for agents across your organisation, giving IT a single solution to observe, govern and secure every agent. As agents multiply, that single point of visibility is what keeps the end-to-end strategy coherent. This allows IT to identify what's working, refine what isn't and retire what's no longer needed.

The result is one ecosystem where every agent – pre-built, custom or partner-sourced – is connected to the work, governed under one model and visible from one place.

Get started

The first agent is the hardest one to ship. After that, the footprint grows quickly. More agents mean more integrations to maintain, more identity rules to enforce and a governance surface that grows with every deployment.

The organisations doing this well are building from a foundation designed to absorb complexity. One control plane, one governance model, one place to see every agent operating across the business.

That's the advantage of starting with Microsoft 365 Copilot. Every agent you ship extends the same coherent strategy, so IT keeps end-to-end visibility as the footprint grows.



Open Microsoft 365 Copilot to get started today



[Learn more about building agents with Copilot Studio](#)



[See how Microsoft Agent 365 gives IT a single control plane for every agent](#)