

Employee Self-Service (ESS) Agent Adoption Guide



Purpose of this document

This Adoption Guide provides organizations a framework for implementing the Employee Self-Service (ESS) Agent within Microsoft 365 Copilot, ensuring that adoption efforts are aligned with business objectives. It emphasizes the importance of integrating ESS into existing workflows to enhance employee experience and operational efficiency, ultimately driving measurable outcomes such as cost savings, productivity gains, and improved employee satisfaction.

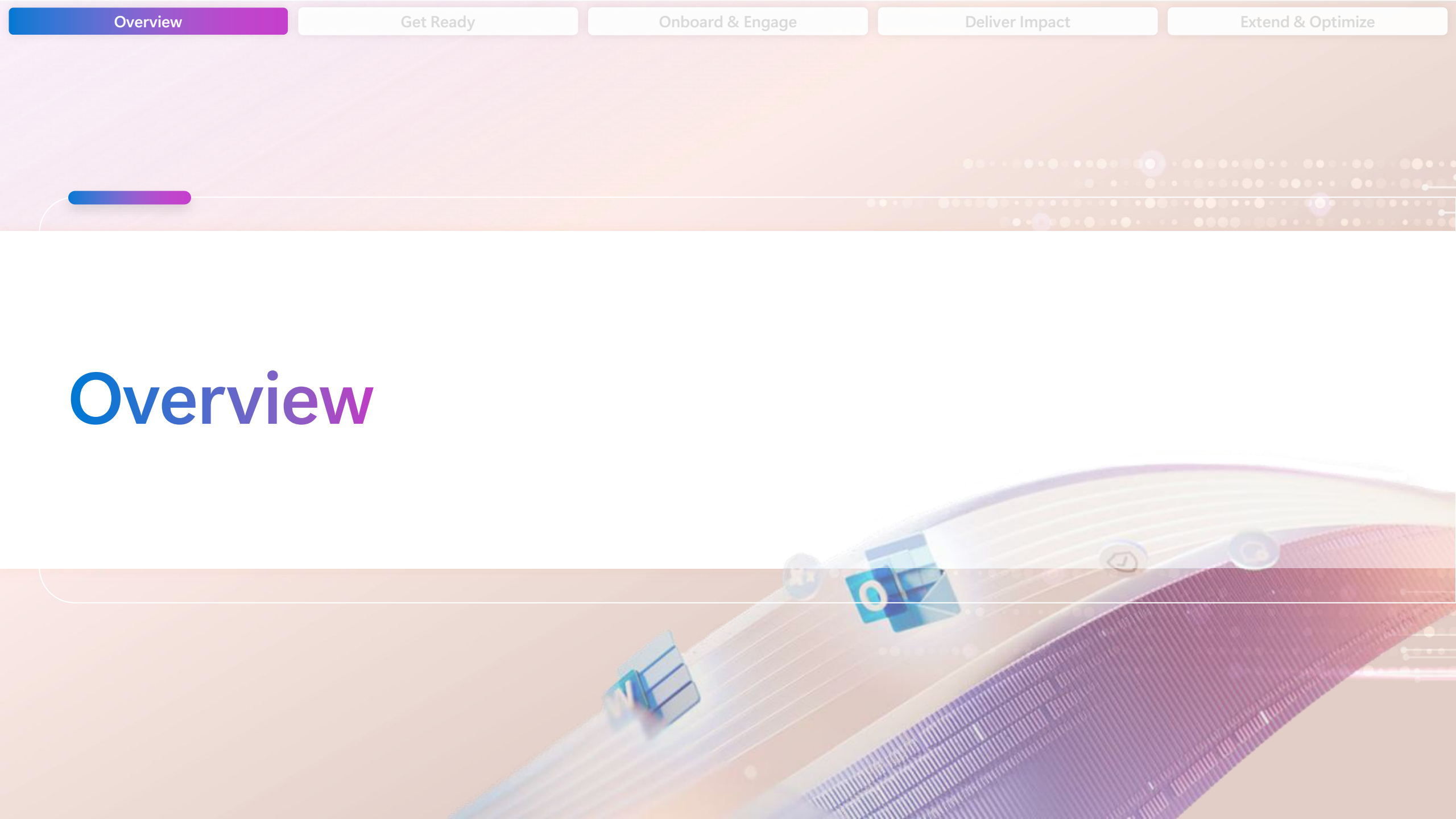
The main goals of this Adoption Guide are to

-  Provide a high-level guide for organizations to successfully adopt ESS and maximize business value.
-  Outline the key phases of ESS rollout: Get Ready, Onboard & Engage, Deliver Impact, Extend & Optimize; and describe how this phased approach helps organizations manage change effectively and deliver value at every stage.
-  Define roles, responsibilities, and technical prerequisites for stakeholders involved in ESS implementation.
-  Share best practices to roll out and track user adoption and engagement.

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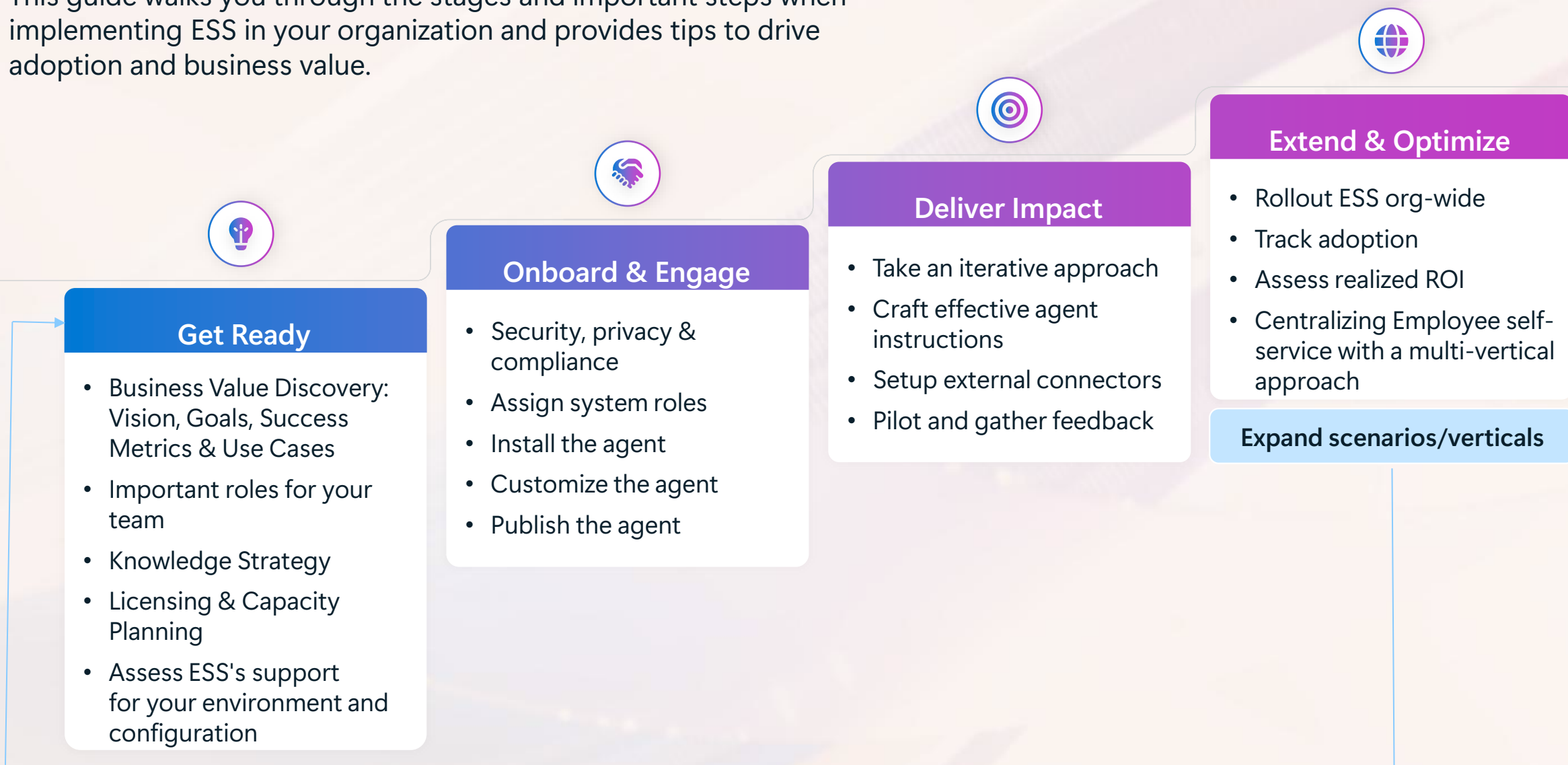
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- 4 Deliver Impact
- 5 Extend & Optimize
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Overview



Key ESS Adoption Stages

This guide walks you through the stages and important steps when implementing ESS in your organization and provides tips to drive adoption and business value.



Driving ESS adoption and unlocking business value

Driving adoption of the Employee Self-Service (ESS) Agent is more than deploying new technology—it's about transforming how employees interact with HR and IT processes to deliver measurable business value. Successful adoption starts with a clear vision for ESS and alignment on strategic goals, ensuring that every stakeholder understands how ESS will contribute to improved employee experience and operational efficiency.

ESS is optimized for scenarios that help organizations unlock high-impact outcomes. Primary focuses are cost savings through support ticket volume reduction, increased productivity, and higher employee satisfaction by simplifying access to HR, IT and other employee-facing services.

Here are key questions to answer

- What is your vision for the future of Employee Self-Service at your organization?
- What does success look like to you and your key stakeholders?
- What outcomes are you trying to achieve? What are your short and long-term goals for ESS?
- Is ESS a good fit for your priorities and desired outcomes?
- How do you envision the ESS Agent contributing to your overall business and employee experience strategy?
- What challenges are you experiencing within HR or IT that you'd like to address with the ESS Agent?
- Have you already identified any high priority scenarios to focus on with ESS? Are your key stakeholders across your organization aligned with this?
- Have you reviewed the [known issues and limitations](#) to ensure ESS is the right fit for your organization at this time?

Get Ready



Business Value Discovery

Business Value discovery is essential for steering program efforts towards outcomes that truly matter and deliver measurable impact. Below is guidance to help you sharpen your approach and thinking in this area

1 Align with the ESS Vision

- Ensure your approach reflects the vision of ESS as the single, unified entry point for all employee self-service needs.

2 Choose which vertical to start with

- In order to accelerate time to value, start with one vertical (HR or IT) based on your organization's most pressing challenges and highest-priority use cases.
- Two verticals can be done in parallel if desired.

3 Define outcomes and success metrics

- Identify what success looks like. Start by listing the challenges ESS aims to solve—such as high support ticket volumes or difficulty accessing company policies.

4 Prioritize initial Use Cases

- Select the first set of use cases for ESS to handle. If unsure, review HR or IT tickets for high-volume, low-complexity themes.
- Ensure these map well with the scenarios ESS supports.

5 Set Pilot success criteria

- Determine what would indicate a successful pilot. For example: Improved response quality compared to current processes; Faster access to policies and documentation.

6 Start simple and iterate for continuous improvement

- Start with a simple approach, focusing first on foundational capabilities like knowledge retrieval, then gradually expand to actions and integrated workflows.
- Begin by enabling employees to easily find authoritative HR or IT information through a single, centralized access point.

**The worksheets in the Appendix section of this document can be used to capture and communicate your organization's ESS business value/ROI journey*

Important Roles for your team

Implementing an Employee Self-Service (ESS) solution is more than just rolling out new technology—it's a shift in how employees interact with HR and IT processes. For ESS to be truly effective, HR and IT teams must work together from day one. HR brings insights into employee needs, policy requirements, and workflow improvements, while IT ensures seamless integration, security, and technical functionality. When these teams collaborate closely, the result is a user-friendly, well-optimized ESS solution that enhances efficiency without creating new barriers.

Your ESS implementation team should include

- **Executive Sponsor** – Provides the vision, decision-making authority, and leadership needed to drive organizational change.
- **Project Manager** – Manages timelines, milestones, and deliverables, ensuring the project stays on track.
- **HR/IT Business Leader** – Defines test scenarios, sets success metrics, and ensures the solution meets business needs.
- **Implementation SMEs** – Includes M365 Tenant Admin, ESS Administrator, System Administrator, and other technical experts who configure the system, enable access, and integrate ESS with existing tools.
- **Test Users** – A select group of employees who validate the system, provide feedback, and help refine the experience post-launch.
- **Change Management Lead** – Drive organizational adoption by aligning stakeholders, managing readiness, and solution pilot and org-wide roll-out.

Identify priority use cases

Start by identifying the most common employee self-service needs and group them into themes. Review your HR or IT tickets for high-volume, low complexity themes. Below are examples of common scenarios, the prompts employees might use, and where the information is stored (content sources).

Theme	Key Scenario	Example Prompt	Example Content Source (Connectors)
HR & Workforce Management	• Accessing HR policies • Understanding remote work policies • Updating personal details • Checking job role details	• "Update my address" • "What is my work anniversary?" • "Where can I find the latest leave policy?" • "What are the remote work guidelines?"	Workday/SAP SuccessFactor, SharePoint
IT Support	• Accessing IT Policies • Employees need IT troubleshooting help • Checking IT ticket status • Ensuring device compliance	• "What's the status of my IT support request?" • "Guide me how to reset my password" • "Is my laptop compliant with company security policies?"	ServiceNow

Example HR scenarios

Here are some examples of HR scenarios. Some of these scenarios require customization beyond the starter workflows, but ESS is fully extensible.

	Scenarios	Scenario Type	Microsoft-Built Connectors
 Knowledge Retrieval	Can I extend my maternity leave?	- Knowledge Base - Document Management - Employee Support	   
	List upcoming anniversaries for team members		
	Do I have any training due?		
	What are my company holiday's this year?		
	How much PTO do I have left this year?		
	What is my cost center?		
 Task Completion	Help me transfer my direct report	- Ticket Management - Equipment Lifecycle Management - Human Capital Management - Payroll - Benefits - Time and Attendance	  
	Update my home address		
	Submit PTO request		
	Create, update, and check on support tickets		

Example IT scenarios

Here are some examples of IT scenarios. Some of these scenarios require customization beyond the starter workflows, but ESS is fully extensible.

	Scenarios	Scenario Type	Microsoft-Built Connectors
 Knowledge Retrieval	Top issues in Alert Centre	- Knowledge Base - Document Management - Employee Support - Support for Microsoft Products and Services	 M365 Self-Help  SharePoint servicenow
	Am I eligible for a computer upgrade?		
	How do I join the AAD domain		
	Cannot connect to the VPN		
	Outlook connectivity		
	I need help to set up windows Hello		
	Outlook rules does not work		
	My windows update fails to install		
	How to set up or fix my phone authentication?		
	I am not receiving notifications to Authenticator		
 Task Completion	I am unable to set up Android work profile	- Device Compliance - Transition to an Agent - Ticket Management	 M365 Self-Help servicenow
	Help me resolve my IT issue (Excel not working, device issues)		
	How do I get my device compliant?		
	Are all my devices compliant?		
	I want to connect to an Agent		
	I need an agent to call me		
	What is the status of my ticket?		
	Troubleshoot Windows Hello		
	Create, update, and check on support tickets		
	Troubleshoot my camera		
	Troubleshoot Windows Update		

Have a clear Knowledge Strategy

The Employee Self-Service Agent uses AI to provide employees with the most helpful answers by pulling information from sources like your SharePoint or ServiceNow knowledge base. Thanks to this advanced technology and the filtering options in Copilot Studio, you don't need to completely overhaul your existing knowledge base. However, having a clear understanding of how your content is organized and the key topics or questions you want to address will help ensure employees get the best experience. [Optimize Sharepoint Knowledge Sources](#)

Tips for a Stronger Knowledge Base

1

Conduct a Comprehensive Content Audit

- Review all HR, IT, and policy documents.
- Identify outdated, missing, or conflicting information.
- Organize content by relevant ESS sections (HR, IT, Payroll, Policies, etc.).
- Ensure content is accessible through ESS-integrated platforms like SharePoint, ServiceNow, and Workday.

2

Maintain Up-to-Date and Accurate Content

- Establish a regular review process with assigned content owners.
- Coordinate with HRIS, ITSM, and other systems to prevent outdated information.
- Use version control to track updates and maintain accuracy.

3

Make It Employee-Friendly

- Use clear, straightforward language and avoid jargon.
- Include FAQs based on real employee questions.
- Collect employee feedback to improve content continuously.

The Takeaway



A well-organized knowledge base is the secret to a **frictionless ESS experience**. When employees can easily find what they need, HR and IT teams spend less time answering repetitive questions—boosting productivity across the board. Start with a content audit today and set your employees up for success!

Licensing and capacity planning

The Employee Self-Service Agent is included in the Microsoft 365 Copilot offering*



For users with Microsoft 365 Copilot licenses, the Employee Self-Service Agent is included alongside other Copilot capabilities in their instance of Microsoft 365 Copilot.



Users without Microsoft 365 Copilot licenses will be able to access the Employee Self-Service Agent in Copilot Chat on a pay as you go basis, metered through Copilot Studio.



The ESS agent uses agent flows. Here is guidance on how to set up the Copilot Studio capacity. [Billing rates and management – Microsoft Copilot Studio | Microsoft Learn](#)

Onboard & Engage

A decorative graphic at the bottom of the slide features a wavy line in shades of purple and blue. Along this line are several icons: a small blue cube, a larger blue cube with a white 'O' inside, and a circular icon with a white 'O' inside. The background is a light orange gradient with a pattern of small, semi-transparent circles.

Microsoft's AI Principles



Fairness



Reliability
& Safety



Privacy &
Security



Inclusiveness



Transparency



Accountability

Microsoft Cloud — AI you can trust

- Your data is **your** data.
- Your data is **not** used to train the OpenAI foundation models without permission.
- Your data is **protected** by the most comprehensive enterprise compliance and security controls.

As a part of M365 Copilot, the *Employee Self-Service Agent* adheres to the same security, compliance, privacy and responsible AI principles.



[Copilot Studio security and governance](#)

For more answers to privacy and security questions, please visit [Data, Privacy, and Security for Microsoft 365 Copilot](#)

ESS-specific security & privacy related guidance

ESS Agent must be deployed in a Power Platform Environment with Dataverse, which is governed by “**System Administrator**” role that’s a built-in role having full access to the environment, which cannot be modified with custom role-access permissions. Hence the users assigned to this role will have full access to the Dataverse tables, including “*ConversationTranscript*” that stores all the activities that users had with the agent, possibly including any sensitive information.

Note that the transcripts are not stored for agents deployed in developer environments.

[Understand downloaded conversation transcripts](#)



Guidance: Practice caution in assigning the right set of users in ESS Agent’s Power Platform environment “**System Administrator**” role

Assigning system roles to your team for deployment

The [Deployment Overview Article](#) provides detailed technical instructions for how to deploy ESS in your environment.

The ESS Agent includes several different technical components and configuration areas, which require different Microsoft 365 roles for deployment. You need to assign these system roles to implementation SMEs in your team. We recommend you use the least privileged role possible to perform each necessary activity. For roles with elevated privileges, use just-in-time access.

Role	Description	Activities performed	Configuration areas
Global admin	User who has permissions to configure and delegate other roles	Assign user roles	Microsoft admin center
Power Platform administrator	User who has power to configure Power Platform environments and assign roles within Power Platform	• Create environments • Assign user roles • Install ESS agent	• Power Platform • Microsoft Copilot Studio
Power Platform maker	User who has permission to make changes in a specific Power Platform environment. We recommend you have the agent owner for this agent perform this role	Configure ESS agent	• Power Platform • Microsoft Copilot Studio
System administrator for power platform environment	System Administrator role is especially for Dataverse enabled Power Platform environments, and ESS requires Dataverse enabled environment, where System administrator have full control	• Environment setup & governance • Role assignments & access control • Agent deployment activities • Pipeline & automation • Security & compliance	• Power Platform • Copilot Studio
External Systems administrators	Users who manage third-party solutions	Provide configuration inputs for External Systems applications	External Systems application's administration and configuration interface
Information security	Infrastructure team who manages and controls enterprise application security policies	• Allowlist inbound requests for External Systems endpoints • Manage single sign-on configurations	• Network firewall policies • Single sign-on applications
Change control board	Team that manages changes in an organization relating to deploying an enterprise application	• Approve technical architecture • Approve data security, compliance, and governance policies • Approve responsible AI policies	N/A

Install the Agent

Follow the below steps to successfully install the agent (relevant reference articles are linked)

- **Environment Setup**: Sign in as an Environment Administrator and verify the correct Power Platform environment before installation.
- **Preferred Solution Creation**: Establish a new unmanaged solution in the development environment to enable customizations and lifecycle management.
- **Agent Installation**: Use the Copilot Studio interface to locate and install the ESS agent into the selected environment.

Verification Checklist

Role	Verification steps	Result
Environment Administrator	1. Sign in to Copilot Studio. 2. Select Agents to confirm whether your newly created agent is listed. 3. Confirm the Employee Self-Service agent is listed. 4. Share the agent to Environment Maker with "Editor" permissions	Pass/Fail
Environment Maker	Access the newly created agent from Copilot Studio	Pass/Fail

Customize the Agent

The below is a checklist of items to customize so the ESS experience is personalized and extended based on your organization's requirements

- **Branding:** You can brand the ESS agent based on your branding guidelines. [Customize the Employee Self-Service agent | Microsoft Learn](#)
- **Agent instructions:** Agent instructions are a high-quality description for each of its topics, actions, and knowledge sources. [Design guidance and best practices | Microsoft Learn](#)
- **Emotional Intelligence & ambiguity:** EQ & Ambiguity topics can be customized or disabled in Copilot Studio. The article outlines best practices recommending testing for effectiveness before deployment.
- **Topics:** The employee self-service agent comes with several out-of-the-box topics to get you started like the "[system] – response preparation", "Microsoft the self help" and the "agent handoff" topics. The maker can customize each of these topics. [Customize the Employee Self-Service agent | Microsoft Learn](#)
- **Knowledge sources:** When knowledge sources are added, agents can use enterprise data from power platform, dynamics 365 data, websites, and external systems [Knowledge sources summary – Microsoft Copilot Studio | Microsoft learn](#)
 - SPO knowledge filtering: At times you need to filter knowledge content from SharePoint personalized to the employee. [Use SharePoint advanced filtering for Employee Self-Service agents | Microsoft Learn](#)
- **Customize disclaimers:** [Add an organization specific disclaimer | Microsoft Learn](#)
- **Starter prompts:** Starter prompts help you roll out the ESS agent efficiently to your organization. [Customize Starter Prompts | Microsoft Learn](#)

Publish the Agent

Once the installation, customization & connector set up (based on the domain/scenario of choice) is completed, the agent is now ready to be published. The documentation linked will provide you context on how to do the following: [Publish the Employee Self-Service agent to your organization | Microsoft Learn](#)

- Deploy customization solution to TEST/UAT/PROD as Managed Solution
- Set up authentication
- Publish the ESS agent
- Approve the ESS agent in Integrated apps as an admin
- Workaround if publishing takes more than 48 hours
- Publishing checklist
- Uninstall the ESS agent

Deliver Impact



Start simple and iteratively increase scope

Start with a simple approach, focusing first on foundational capabilities like knowledge retrieval, then gradually expand to actions and integrated workflows. Ensure the ESS agent delivers accurate, value-adding responses at each stage, beginning with a minimal viable scope and enhancing capabilities over time.

Phase	Focus/Scenario Examples	Connectors/Features	Technical Complexity
Phase 1	- Set up single vertical (IT or HR) with basic knowledge retrieval with one knowledge base source Examples: Policy lookup, device care FAQs (IT), onboarding info (HR) - Set up company-crafted responses - Configure the existing built-in topics (e.g., Disclaimer, Crafted response) - Brand your agent - Customize 3–6 starter prompts - Publish the agent to M365 Copilot and make it available for a small group of pilot users	SharePoint/Other Knowledge Sources	Low
Phase 2	- Add Copilot Connectors (e.g., ServiceNow KB) and additional user context for enhanced knowledge retrieval (e.g., leave balances (HR), device requests (IT), general resource navigation) - Add External Systems packages (e.g., Workday Power Platform connector for HR) - Add in workflow automation and more complex action taking scenarios (e.g., Workday integration (HR), advanced ticketing, catalog fulfilment (IT)) - Add Live agent handoff and/or Handoff to another agent (if needed) - Expand ESS availability to a broader group or full organization	External Systems packages (ServiceNow, SAP, Workday, ServiceNow Live Agent)	Moderate/High
Phase 3	- Add custom connectors or additional tools (if needed) - Add custom topics to cover additional scenarios/workflows to increase ESS capabilities - Continuously review analytics to improve knowledge base and agent response and usefulness - Periodically review success metrics/outcomes to show realized value/ROI - Add additional vertical/s - Expand ESS availability to full organization - Maintain a long-term change management program to increase end user adoption	Custom connectors, custom topics	Moderate/High

Craft effective instructions for the ESS Agent

Agent instructions are important as they influence the accuracy and tone of responses. A great response is accurate, actionable, and engaging to ensure we earn trust, provide useful responses, and help the user take the next step using self-service tools.

Out-of-the-box ESS includes default working agent instructions which should be customized to reflect your company's culture and personality.

Here are the elements of the ESS agent instructions that can be customized

- **Response Elements:** Responses are a combination of instructions, knowledge, and UI elements built on top of the Copilot language model. [How responses are formed](#)
- **ESS Agent Instructions:** Often referred to as a meta prompt or system prompts, instructions guide the agent with context, examples, and other information relevant to a specific use case. Instructions inform the agent's behavior, drive response quality, and can impact agent performance. [How to write effective instructions](#)
- **Defining ESS Agent identity:** An agent's role and identity shape every interaction it has with users. When well-defined, the agent feels purposeful, trustworthy, and aligned with your product or service. [Developing agent personality to define content strategy](#)
- **Testing responses:** Testing response quality and setting clear benchmarks help teams identify what's working well and where improvements are needed. Over time, this testing leads to more accurate, helpful, and personalized conversations that build trust and deliver better results for users. [Test the quality of your ESS agent's responses](#)

Setup the External Systems Connectors

Based on the vertical identified in the discovery phase and your application infrastructure, select the appropriate connectors to set up



For HR vertical:

- SNOW HRSM
[Integrate ServiceNow HRSD and ITSM with your Employee Self-Service deployment | Microsoft Learn](#) [Install ServiceNow HRSD extension pack](#)
- SAPSuccessFactors:
[Integrate SAP SuccessFactors with your Employee Self-Service deployment | Microsoft Learn](#)
- Workday:
[Integrate Workday with your Employee Self-Service deployment | Microsoft Learn](#)
- [Live Agent](#)



For IT vertical:

- ITSM
[Integrate ServiceNow HRSD and ITSM with your Employee Self-Service deployment | Microsoft Learn](#)
- [Live Agent](#)

Pilot ESS to gather feedback for your rollout

Here are the suggested steps for your Pilot approach

- 1 Start with a targeted subset of users** based on the domain of choice. For example, if piloting HR, include those handling HR support requests; for IT, include IT support staff and leaders.
- 2 Expand to additional populations** only after validating success and incorporating feedback, preparing for an organization-wide rollout.
- 3 Document the pilot experience thoroughly:**
 - Provide clear instructions for pilot users on how to access the agent.
 - Specify the scenarios and workflows to be tested.
 - Set up a central location (e.g., Teams channel, SharePoint site) to capture feedback and outcomes.
- 4 Circulate concise user surveys to capture feedback focusing on:**
 - Response accuracy, quality, usability.
 - Value realization against program specific goals and KPIs.
 - Use survey results to inform further iterations and customization of the agent.

Extend & Optimize

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Roll-out ESS across your organization



In preparing for your ESS rollout

- Leverage insights from the pilot to refine your rollout strategy in order to maximize value realization
- Confirm technical readiness: ESS agent installed, connectors configured (e.g., Workday, ServiceNow), crafted responses in place, Pilot test runs have been completed with key stakeholders, and the feedback is positive
- Validate security and compliance reviews are complete
- Ensure support model is defined (who handles escalations, FAQs, and feedback from end users)
- Provide training and quick reference guides to end users
- Ensure you have a robust communication strategy for the target users
- Consider how you will measure value realization and KPIs during your rollout and ongoing

Track ESS adoption



In order to track your organization's adoption of ESS you should monitor ESS agent usage using the available tools. More details can be found here on how to do that:

[Usage analytics for the Employee Self-Service agent | Microsoft Learn](#)

The following is covered in the linked article



[Analyze conversational agent effectiveness](#)



[Provide feedback](#)



[Auditing and logging](#)

Assess the realized ROI of ESS



1 Track adoption of solution

Use Copilot Analytics & Copilot Studio Analytics to track metrics including:

- Active users
- Frequency
- Usage over time

2 Monitor success metric trends over time

- Utilize available reporting mechanisms to gather quantitative feedback
- Measure operational KPIs and business outcomes at regular intervals
- Compare against baseline or comparison groups to highlight improvement and causal impact of ESS

3 Collect feedback to validate and refine solution

- Gather qualitative feedback via user surveys
- Encourage users to share feedback via the In-built response specific feedback mechanism in ESS

4 Calculate realized ROI

Compare benefits (changes in operational KPIs and business outcomes) to actual costs to compute ROI and payback time

Choosing a "centralized experience" strategy for Employee Self-Service



? Will your ESS deployment include multiple verticals?

No



1. Choose starter focused on the intended single vertical (HR/IT).
2. Configure, perform acceptance testing, and deploy.

Yes

? Planning for the next 12-18 months, do you anticipate needing the following?

- Vertical-specific RBAC
- Vertical-specific telemetry & analytics isolation
- > 25* knowledge sources shared across all verticals
- > 60* distinct workflows shared across all verticals

*: These thresholds are being finalized as architecture stabilizes

No



1. Choose a starter focused on the first/primary vertical (HR/IT).
2. Configure accelerators, knowledge, workflows for all verticals.
3. Perform acceptance testing and deploy.

Pros:

- Simpler ALM
- Faster responses
- Cross-vertical answers*

Cons:

- Less flexible / extendable
- Single RBAC
- Single combined telemetry

*: Depending on intended behavior, this may be desirable or undesirable



For many customers, this is sufficient for their planned capabilities for the next 12-18 months.

Yes

1. Choose one or more starters (HR and/or IT).
2. Configure, keeping each vertical distinct.
3. Proceed through vertical user acceptance testing.
4. (Optional) Deploy first/primary vertical.

Then

IN PREVIEW



1. Create and connect to an employee-facing parent agent.
2. Perform combined user acceptance testing and deploy.

Pros:

- More flexible / extendable
- More fine-grained RBAC
- Separate vertical telemetry

Cons:

- More complex ALM
- Increased response times



This path is possible but will involve moving topics and configurations into different ESS vertical agents

Sample customer profiles for the multi vertical approach



Customer 1

- Primarily focused on HR
- Some simple IT scenarios
- No significant complexity anticipated

Install ESS agent HR starter.

Configure HR knowledge, accelerators, and workflows.

Add IT knowledge, accelerators, and workflows.

Single agent deployed to employees.

Customer 2

- Desires HR, IT, and more (Facilities, etc)
- HR is primary/leading vertical
- Needs vertical-specific RBAC
- Some complexity in each vertical

Install ESS agent HR starter & configure HR knowledge, accelerators, and workflows.

Install ESS agent IT starter & configure HR knowledge, accelerators, and workflows.

Deploy HR agent to employees with combined agent name.

When multi-agent is available, create parent agent & link vertical agents.

Deploy parent agent (replaces HR agent).
NOTE: One-time loss of employee conversation history.

Customer 3

- Desires HR, IT, and more (Facilities, etc)
- Wants to be multi-vertical from Day 1
- Needs vertical-specific RBAC
- Some complexity in each vertical

Install ESS agent HR starter & configure HR knowledge, accelerators, and workflows.

Install ESS agent IT starter & configure HR knowledge, accelerators, and workflows.

Join preview or wait until multi-agent is available.

Create parent agent & link vertical agents.

Deploy parent agent.

Further Resources



[ESS Adoption Hub](#)



[End user demo video](#)



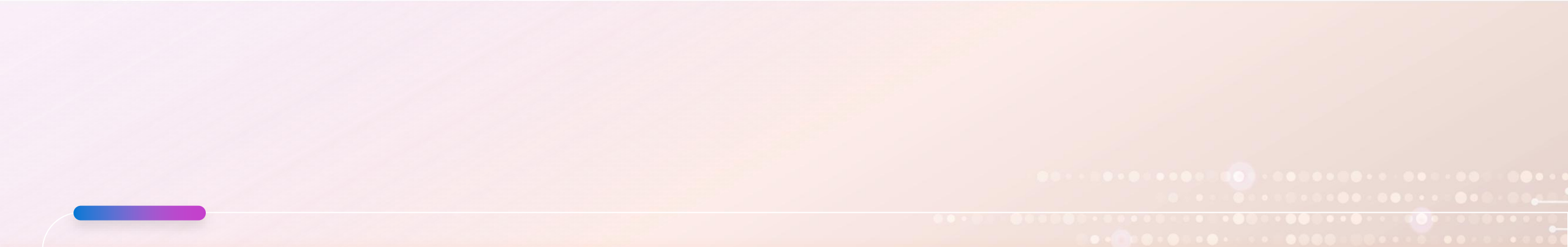
[Maker demo video](#)



Official documentation: [Overview of the Employee Self-Service agent | Microsoft Learn](#)



[Known issues and limitations](#)



Appendix



Worksheet: Stakeholder Alignment

Use this worksheet to record the key stakeholders for your ESS rollout

ESS Team	Responsibilities	Directly Responsible Individual (DRI)
Executive Sponsor <i>As needed throughout the project</i>	Provides solution vision, decision authority, and change leadership	<<Complete this column>>
Project Manager/Program Lead <i>1–2 hours throughout the project</i>	Identifies test users, drives project timelines, key decisions, deliverables and rollout plan	
HR/IT Business Leader <i>4–6 hours a week throughout the project</i>	Defines test scenarios, high-value prompts, success metrics	
Implementation SMEs <i>2–3 hours a week throughout the project</i> • <i>M365 Tenant Admin</i> • <i>ESS Administrator</i> • <i>System Administrator</i> • <i>Copilot Maker</i> • <i>Connectors SME (For knowledge, HCM, Ticketing)</i> • <i>HR Policy Validators</i> • <i>Change Management Lead</i> • <i>Privacy, Security & Compliance Lead</i> • <i>Responsible AI Lead</i> • <i>Content management team</i>	Configures the environment; enables access, prepares and integrates data with existing systems	
Test Users (Max 50) <i>1–2 hours a week post go-live</i>	Test and validate scenarios, provide insights, and report issues	

Worksheet: Define Goals & KPIs

Use this worksheet to capture Goals, KPIs & current baselines that you'd like to track, examples below

Challenge/Business Problem	Goal Definition	KPI(s)	Data Source/Baseline
Low employee satisfaction with accessing self-service tools	Improved access to guidance on best practices aligned with company policies	Example ESAT: 20% improvement in employee satisfaction surveys within the first year	Current ESAT is 65
High volume of support tickets	Reduce support tickets	Example Number of employee enquiries: 50% decrease in employee inquiries for issues within six months	Current Number of enquiries per month is 5,000–7,000
Teams overwhelmed with routine queries	Reduce effort for teams	MAU: Agent usage and consumption	No baseline
Employees struggle to find company policies and benefits information	Reduce search time and quicker access to information		
Inefficiencies in leave and payroll management processes	Streamline leave and payroll management	Reduction in email volume for payroll team	Current number per month is 300

**This is a sample, please populate information specific to your organization*

Worksheet: Define Prioritized Use Cases

Use this worksheet identify the vertical (HR/IT) and use cases you'd like to prioritize in the implementation phase, examples below

Use Case	Description	Knowledge retrieval/Action	System/Agent interfaces	Sample Prompts
Update email address	Employee wants to update their email address in Workday	Action taking	Workday	I just changed my name, can you change my email address in Workday
Employee Anniversary dates	Supervisor wants to know who has a work anniversary coming up	Knowledge retrieval	Workday	I want to make sure I congratulate everyone on my team who has a work anniversary this month. Can you send me a list of my team's work service anniversary dates
Info on getting a new laptop	To understand the asset refresh qualification date and initiate the refresh process for a new laptop	Knowledge retrieval	ServiceNow	When is my laptop due for refresh and help me initiate the refresh process?

**This is a sample, please populate information specific to your organization*

Worksheet: ESS ROI Forecast

Use this slide to capture the ROI impact & modify variables based on individual use cases/goals as applicable.
The below is a sample

Scenario purpose

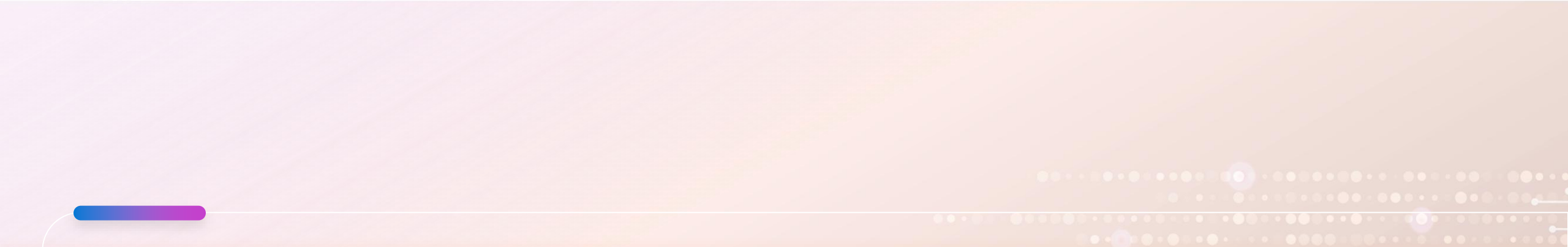
Employee Self-Service (ESS) answers policy questions and simplifies HR and IT related tasks by connecting to employee knowledge bases, resources, and systems in HR and IT for faster resolution time and streamlined employee experience. Includes official responses, optimized workflows, direct actions (e.g., setting time off or requesting long term leave), and is available on core M365 Copilot surfaces

Assumptions and inputs

- \$ hourly support rate
- Average time per case ranges
- Total hours saved
- \$ value of saved hours

ROI Forecast			
Step	Description	Inputs	
1. Know What You Want to Improve	Current state of relevant KPIs	Annual HR Tier 1 Support Tickets: 24,000	
2. Assess the Potential Impact of the AI Solution	Key attribution and impact assumptions	Copilot agent will deflect 70% of Tier 1 tickets	
3. Estimate How Fast People Will Start Using It	Adoption estimates based on rollout plan	0–3 months: 20% adoption 3–6 months: 50% adoption 6–12 months: 70% adoption	
4. Predict the Improvements	Expected impact on KPIs	16,800 inquiries deflected annually at full adoption	
5. Assess Confidence and Risks	Flag confidence (e.g., impact) and risks (e.g., adoption)	Risks: Adoption lags, agent accuracy lower than expected Sensitivity Check: If only 50% of inquiries deflected → 12,000 Tier 1 tickets deflected annually	
6. Compare Costs and Benefits to Estimate ROI	Overall ROI estimate before detailed calculations (net cost savings/costs)	Costs: • \$30K development • \$15K change management • \$15K AI platform usage Total: \$60K/year	Benefits: • 3,080 support hours × \$50/hour = \$154,000/year
		ROI Scenarios: • Low: \$90K saved → ROI = 50% • Medium: \$120K saved → ROI = 100% • High: \$154K saved → ROI = 157%	

**This is a sample, please populate information specific to your organization*



End of document

