Employee Self-Service Agent Readiness Guide

Purpose: Use this checklist to ensure that Employee Self-Service Agent is a good match for your organization.

Note: Your success and satisfaction with Employee Self-Service Agent and Microsoft 365 Copilot depends on an upfront understanding of the agent's capabilities, the level of configuration required to successfully launch Employee Self-Service Agent (or any HR/IT agent) and ensuring that environment and pre-reqs are met ahead of time.

How to use this document:

Work with your team to go through this checklist. If all these items are in place, you are ready to deploy the Employee Self-Service Agent.

If not, use the *"If there's a gap"* sections and linked documentation to close any readiness gaps.

Employee Self-Service Agent (ESS)

Employee Self-Service Agent is a very sophisticated starter template to create a Microsoft Copilot Studio agent. A few important notes:

- ESS requires configuration of key third-party systems (Workday, ServiceNow, and SuccessFactors). Although we have extensive documentation, your organization may have modified those third-party systems in ways that our documentation does not take into account. Involving the people responsible for those systems within the your environment early is key.
- As a Copilot Studio custom agent, ESS needs to be configured and can then be further extended and configured as any other Copilot Studio Agent. However, it does require a level of familiarity with Copilot Studio and the PowerPlatform to be successful. If your organization does not already have this capability in-house, it will be highly recommended to partner with FastTrack, CSU, request ECIF funding, or secure an SI to help (list of supported SI's).

Employee Experience & Adoption Readiness

Key Points:

- ESS is only supported as a Microsoft 365 Copilot or Copilot Chat agent – this is because Copilot is the UI for AI, including for Employee Experiences. Thus, you will need to have deployed Copilot Chat to all employees that should get access to ESS.

Additional Considerations:

- ✅ We have employees actively using **Microsoft 365 Copilot or Copilot Chat**.
- ✅ We want to improve **employee access to HR, IT, and Facilities information**.
- ✅ We have clear goals like **reducing ticket volume** or **shortening response times**.
- ✅ We have reviewed the list of out of the box scenarios and sample workflows to ensure a good mapping of the our vision with what ESS supports.

Suggested Documentation:

- Create your AI strategy – Azure Cloud Adoption Framework

If there's a gap:

- Prioritize Copilot and Teams adoption first; ESS works best where employees already collaborate.
- Understand that ESS as an extension of tools people already use, not a new destination.
- Identify common pain points your employees have with HR, IT, or Facilities questions to shape your first use cases.

Content & Knowledge Foundation

Key Points:

- ESS has streamlined support for HR, IT content stored in ServiceNow Knowledge Base articles and in SharePoint (as pages or documents).
- Key to the success of Knowledge Retrieval is the ability for ESS to understand which policies and procedures apply to different employees. Thus, consistent metadata

and/or permission or content structure for ESS to be able to accurately filter the content is critical.

- ServiceNow Knowledge Base articles must be setup and connected via the ServiceNow Graph Connector. This process is often complex and it requires validation that all permissions, user mapping, and content were correctly indexed. This can take between one week to several months to get right.

Additional Considerations:

- ✅ We have internal HR/IT/Facilities content available.
- ✅ Our content is **accurate, structured, and up to date**.
- ✅ We know which documents or repositories the agent should reference.
- ✅ We have a plan to **maintain and update content over time**.

If there's a gap:

- Audit current knowledge sources for outdated or duplicate materials.
- Centralize critical content into a single accessible knowledge base.
- Assign content owners with clear review cadences (e.g., quarterly).

Suggested Documentation:

- **Knowledge sources summary**— breakdown of what knowledge sources are supported in Copilot Studio. Microsoft Learn
- **Knowledge management best practices for Copilot ingestion**— covers content-prep for Copilot ingestion, data quality, lifecycle, compliance. Microsoft
- **Unstructured data as a knowledge source** - explains how unstructured files (docs, PDFs, KBs) are ingested and how that affects structuring. Microsoft Learn

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Technical Environment & Access

Key Points:

- Prior to ESS configuration, your team will need to have configured Copilot Studio and Power Platform environments for product and sandbox.

- The Workday, ServiceNow, and SuccessFactors connectors require Entra ID federation OR Okta/Ping with Entra ID federation. Any other identity provider configuration is not supported at this point.
- API Management systems like MuleSoft and Azure APIM are not supported.

Additional Considerations:

- ✅ We have **reviewed the list of known issues and current limitations** to confirm ESS aligns with our business needs and scope for this phase.
- ✅ We have **Power Platform environments** (production or sandbox) with **Dataverse enabled**.
- ✅ We hold the required **Microsoft Copilot Studio / Microsoft 365 Copilot licenses**.
- ✅ We have **admins and makers knowledgeable in Copilot Studio** who can set up, configure, and manage agents.
- ✅ Our admins can **install and manage managed solutions** in Power Platform.
- ✅ Our organization allows deployment of **integrated Teams apps**.
- ✅ We understand how to **configure multilingual agents** and have identified languages in scope for our organization.
- ✅ We have **reviewed local Works Council requirements** (if applicable) to ensure privacy and approval expectations are met.

Suggested Documentation:

- ESS Known Issues and Limitations
- Create and manage Power Platform environments
- Create and publish agents with Microsoft Copilot Studio
- Copilot Studio billing and licensing
- Create and configure multilingual agents

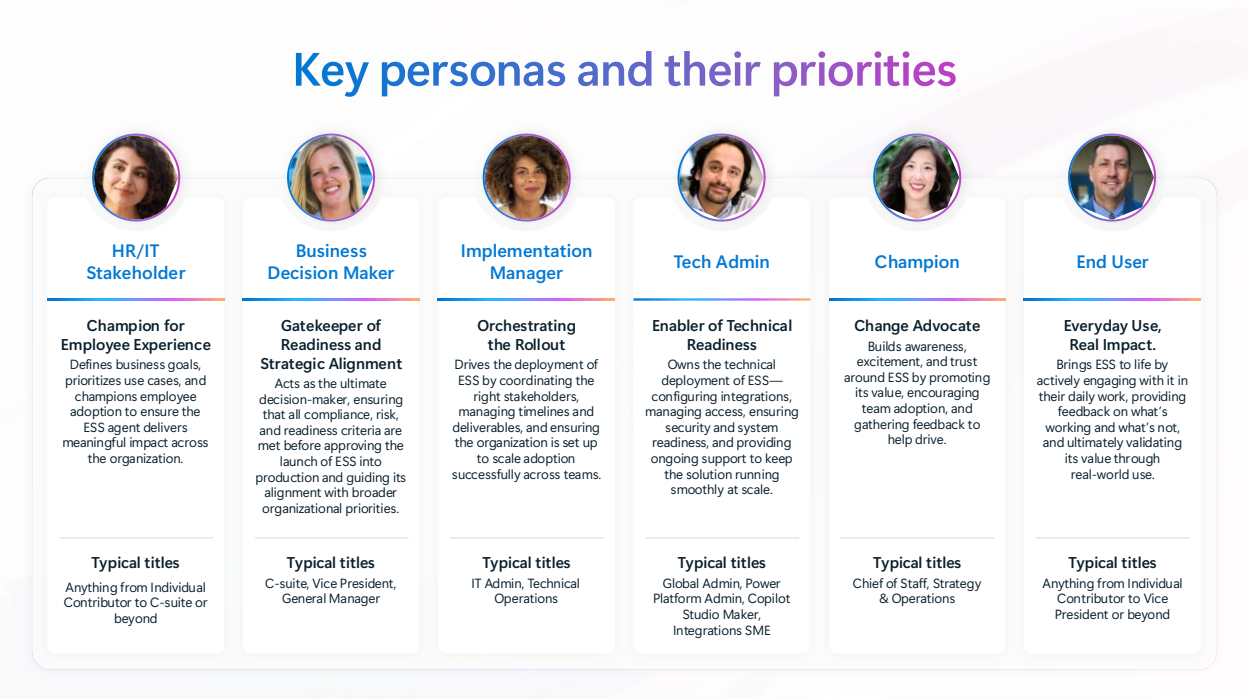
If there's a gap:

- Confirm your Power Platform setup and that Dataverse is enabled.
- Ensure you have at least one Copilot Studio maker/admin with hands-on experience.
- Review your Copilot licensing plan:
    - **Users with Microsoft 365 Copilot licenses** can access ESS at no additional cost.
    - **Users without those licenses** can access ESS on a **consumptive basis**, metered through Copilot Studio.
- Review the **ESS Known Issues and Limitations** to set realistic expectations.

- If operating in multilingual or Works Council regions:
    - Identify required languages and test multilingual responses.
    - Confirm local privacy and Works Council approvals before deployment.
- Complete the Copilot Studio Learning Path.

Ownership, Security & Governance

✅ We have clearly identified key Employee Self-Service Agent roles and responsibilities across the organization:



✅ Our Legal, InfoSec, and Privacy stakeholders are informed and supportive.
✅ We're ready to pilot ESS in a controlled environment.
✅ We understand how and where ESS data is stored (Dataverse).

Suggested Documentation:

- **Key concepts - Copilot Studio security and governance**
- Responsible AI principles and approach

If there's a gap:

- Assign clear owners for each role to ensure alignment.
- Brief Legal, InfoSec, and HR leaders on ESS data handling and privacy controls.
- Form a cross-functional v-team to oversee planning, testing, and rollout.
- Reference Microsoft Responsible AI and Compliance documentation for internal approvals.

Action-based Scenarios

Key Points:

- It is important to review the out of the box scenarios supported for their HCM (Workday or SuccessFactor) along with the sample in the GitHub Sample Repository. It'll then be up to whether your team can configure additional scenarios using those as examples.
- Depending on how much configuration your Workday or SuccessFactors instance has had, it may require additional changes for the pre-configurations or GitHub samples to work in their environment.
- Beyond ServiceNow ticketing, and Workday and SuccessFactors scenarios, Copilot Studio has hundreds of additional connectors. It is up to you to assess the level of security and compliance each of those connectors support.

Additional Considerations:

✅ We've defined **3–5 HR, IT, or Facilities scenarios**
✅ We know the top FAQs employees ask and where those answers live.

If there's a gap:

- Partner with HR and IT support teams to identify top ticket drivers.
- Start with quick-win use cases that deliver value without deep integrations.
- Document employee FAQs and high-value prompts for testing and refinement.

Agent Validation and Supportability

Key Points:

- The most successful deployments are those that invest in creating an ever-expanding evaluation set of prompts and expected responses using Copilot Studio's Evaluation Framework (Evaluate your agent's performance (preview) - Microsoft Copilot Studio | Microsoft Learn). Although this is not required to configure ESS, it is highly recommended.
- We will continue to provide updates to the ESS agent starter. These will update any out of the box system topics or topics that have not been modified by the company. In addition, new LLM models will be recommended and upgraded. These will be communicated accordingly.

Optional

✅ We plan to **integrate HR/IT systems** like Workday or ServiceNow for automation.
✅ We're open to **training and refining** the agent based on feedback.
✅ We have a **roadmap to expand** ESS beyond the initial pilot.

Suggested Documentation:

- ESS Workday Connector
- ESS SAP SuccessFactors Connector
- ESS ServiceNow HR/IT Connector
- ESS ServiceNow Graph Connector

If there's a gap:

- Start with read-only scenarios before adding automation.
- Schedule regular refinement cycles to improve response quality.
- Define a long-term vision for ESS expansion across departments and regions.

✅ You're Deployment-Ready If You Can Check Off:

- Power Platform + licensing are set up
- HR, IT, and Facilities content is ready
- Use cases are defined and aligned to business goals
- Stakeholders and governance roles are in place

- A pilot group is identified and ready to test

Once these are in place, you're ready to:

1️⃣ Install the ESS HR or IT agents in your environment
2️⃣ Connect knowledge and system sources
3️⃣ Pilot and refine before scaling to your full organization