



Becoming a Frontier Firm

Detailed Product Scenarios for Functional Business Processes and Enterprise Transformation

Full Frontier Firm Playbook
can be found [here](#)

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Every organization is on a journey to become a Frontier Firm



82% of leaders say they're confident they'll use digital labor to expand workforce capacity in the next 12-18 months

Top Business Processes for Functional Transformation

Sales	Marketing	Customer Service	Legal	HR	Finance	IT
Customer Self-Service	Demand Generation	Support Assignment	Regulatory & Compliance Management	Employee Onboarding & Exit	Quote to Cash	Data Management
Lead Generation	Content Creation	Issue Diagnosis	Contracting	Recruiting	Record to Report	Software Management & Acquisition
Post-Sale Follow-Up & Upsell	Predictive Analysis	Problem Resolution	Risk Management	Learning & Development	Tax & Treasury	Device Refresh
Analysis & Forecasting	Personalization	Continuous Improvement	Consultation	Talent Management	Planning & Analysis	IT operations
Sales Enablement & Recommendation	Customer Insights & Strategy	Self-help	Advisory Services	HR Strategy & Planning	Procure to Pay	Change Management & User Adoption

Based on an analysis conducted in the fourth quarter of 2025 of the top functional AI solutions being pursued by organizations on the Frontier journey; research on functional business processes with a demonstrated history of being core to successful transformation; and a pressure test against current and emerging Microsoft AI Business Solutions capabilities.

Copilot + Agent Scenarios for Top Business Processes

Sales

Customer Self-Service Assistant. Answer FAQs, configure products & handle routine sales requests 24/7

Lead Scoring & Nurture. analyze intent & engagement signals to prioritise prospects & personalise outreach at scale.

Customer Retention, Renewal & Upsell. Detect churn risk, recommends expansions & sequences outreach at the right time

Predictive Sales Forecasting & Pipeline Insights. Predict revenue, flags at-risk deals, & recommend next-best actions to improve win rates

Sales Enablement & Playbooks. Tailor plays, talk-tracks, & objection handling from top-performer patterns. Cut ramp time & standardise best practice

Marketing

Predictive Audience Targeting & Budget Optimisation. Identify high-propensity audiences & reallocate spend to channels most likely to convert

Content & Asset Generation. Create first drafts, creative variations & brand-safe adaptations. Reduce production cycles; keep messaging consistent across formats/ markets.

Performance Forecasting & ROI Insights. Surface likely outcomes, flag under-performing segments & recommend next-best optimisation actions.

Real-Time Personalization. Deliver tailored messaging, offers & journeys across web, email & ads to increase engagement/ conversion through individual-level relevance.

Insight Mining & Trend Intelligence. Extract signals from customer conversations, market data & social channels. Surface emerging needs, competitor shifts & sentiment trends that inform go-to-market strategy.

Customer Service

Case Routing & Prioritization. Automate triage; analyze customer context, history & urgency to assign each case to best-fit rep to reduce wait times & improve resolution quality.

Issue Diagnosis & Root-Cause Analysis. Guide data-driven workflow, surface likely causes, recommended fixes & relevant knowledge. Cuts investigation time & repeat contacts.

Resolution & Escalation Handling. Suggest validated fixes, auto-complete steps & trigger escalations when SLA risk is detected. Improve speed, consistency & reduce backlog.

Service Quality & Continuous Improvement Insights. Detect recurring issues, emerging patterns & automation opportunities. Enable proactive reduction of inbound volume & cost-to-serve.

Self-Service Assistant & Guided Troubleshooting. Deflect high-frequency queries to conversational and step-by-step self-service flows to improve customer satisfaction, reduce ticket load on support teams.

Legal

Regulatory Intelligence & Compliance Monitoring. Scan regulatory sources, flag changes & map to internal policies & controls; reduce manual tracking effort & lower compliance risk.

Contract Drafting, Review & Negotiation. Create first-drafts, detect risky clauses & recommend alternative based on playbooks & past negotiated terms. Accelerate cycle time & reduce legal workload.

Risk Detection & Mitigation Intelligence. Analyze contracts, policies & operational data to surface emerging legal & commercial risks. Enable proactive mitigation.

Legal Advisory for Business Teams. Answer routine queries, summarise relevant policies & drafts guidance notes; free legal teams for complex, high-value work.

Strategic Legal Insight & Governance Advisor. Synthesise regulatory updates, contract data & risk signals into executive briefings. Support board-level decisions & strengthen governance.

HR

Employee Onboarding & Exit. analyze survey responses, chat data & behavioural signals to surface drivers of satisfaction, burnout & turnover. Improve new-hire readiness, reduce compliance & access risk during departures.

Talent Sourcing & Candidate Screening. Match candidates to roles using skills, experience & fit signals; reduce time-to-shortlist & help recruiters focus on high-quality applicants instead of manual CV filtering.

Adaptive Learning Paths & Skills Development. Build personalised training journeys based on role, skill gaps & career goals; increase completion rates & reduce time spent on irrelevant learning modules.

Talent Pipeline & Succession. Flag rising talent, predict attrition risk & recommend succession plans based on performance, skills & mobility data. Strengthen leadership continuity & workforce planning.

Strategic Workforce Planning & Scenario Modelling. Model future talent needs, hiring gaps, & cost impacts under different business scenarios. Enable proactive workforce decisions instead of reactive headcount adjustments.

Finance

Quote-to-Cash & Revenue. Automate order validation, invoice creation & payment tracking. Speed up cash flow, reduce manual errors & improve visibility across revenue lifecycle.

Close Acceleration & Financial Narrative Generation. Streamline account reconciliation, flag discrepancies & drafts first-pass financial narratives. Cut close time & support CFO review.

Intelligent Tax Determination & Treasury Forecasting. Automate tax classification & filing; predict liquidity needs based on real-time financial & market signals. Lower risk & strengthen cash management.

Predictive Financial Planning & Analysis/ Scenario Simulation. Replace static budgeting with rolling forecasts & what-if models that respond to changing market conditions. Drive faster decision-making & more accurate forecasts.

Touchless AP & P2P Workflow Automation. Automate invoice matching, approvals & payments while flagging duplicate spend & contract discrepancies; cut cycle time & reduce operational cost.

IT

Data Quality & Governance. Detect data anomalies, map lineage & recommend quality fixes. Improve trust in operational and analytical systems while reducing the cost of manual stewardship.

Software Asset Intelligence & Renewal Optimization. Analyze application usage, contract terms & renewal cycles to identify cost-saving opportunities, reduce shelfware, & optimise enterprise software spend.

Smart Device Lifecycle Planning & Auto-Provisioning. Predict refresh needs, forecast inventory & automate device provisioning; cut total cost of ownership & ensure employees always have up-to-date tools.

Service Availability & Incident Prevention. Aggregate telemetry & logs to predict outages, auto-resolve incidents & prioritise root causes. Reduce downtime & improve user experience.







Digital Adoption Coaching & Behavioural Insights. Provide guided workflows, nudges & role-based learning based on real usage patterns. Boost adoption of new tools & reduce dependence on manual training.

Sales Function



Top Scenarios for Sales Transformation

As you mature in your Frontier Firm journey...work evolves from human-led Copilot assistance, to agent-supported decisions, and ultimately to agent-executed workflows with humans providing oversight, judgment, and exception handling.

Scenarios	Key processes	Products	Success Metrics
Customer Self-Service Assistant	Answer FAQs, configure products & handle routine sales requests 24/7	 Copilot Chat  M365 Copilot  Dynamics 365 Sales  Analyst Agent  Researcher Agent  Copilot Studio Agents	<ul style="list-style-type: none"> ✓ Faster execution across core sales work ✓ Higher quality, more consistent sales outputs ✓ More sales activity completed at scale ✓ Stronger revenue signals (leads, renewals) ✓ Clearer pipeline visibility and forecast confidence ✓ Broader automation across sales workflows
Lead Scoring & Nurture	Analyse intent & engagement signals to prioritise prospects & personalise outreach at scale.		
Customer Retention, Renewal & Upsell	Detect churn risk, recommends expansions & sequences outreach at the right time		
Predictive Sales Forecasting & Pipeline Insights	Predict revenue, flags at-risk deals, & recommend next-best actions to improve win rates		
Sales Enablement & Playbooks	Tailor plays, talk-tracks, & objection handling from top-performer patterns. Cut ramp time & standardise best practice		

Click [here](#) for additional details on scenarios, product information, and success metrics.

Renewal Opportunity Planning

Pattern 1



Renewal pipelines are compiled by the **Account Manager** in **Copilot in Excel**, including renewal timelines and suggested talking points. The **Account Manager** reviews the information and plans outreach.

Pattern 2



The **Account Manager** forecasts renewal dates, prioritizes accounts, and drafts recommended engagement plans using the **Analyst Agent**. The **Account Manager** reviews and approves the outreach sequence.

Pattern 3



Renewal calendars are managed end-to-end by the **Renewal Orchestrator Agent* (Custom Agent)**, which triggers outreach and coordinates renewal steps. Complex negotiations or exceptions are escalated to the **Account Manager**.

AI-Powered Customer Self-Service Assistant

*Custom built agents

	PATTERN 1	PATTERN 2	PATTERN 3
	Human uses Copilot	Human uses agent, reviews, and approves output	Humans set direction and agents run entire workflows
FAQ Handling	Using Copilot Chat , the Sales Rep drafts response to a customer question and summarizes product FAQs for a quick reply. The Sales Rep reviews the response and sends directly to the customer.	Answers to common questions are retrieved from the enterprise knowledge base by the Customer Knowledge Management Agent in Dynamics 365* (Custom Agent). The Sales Rep reviews and approves the response before it is sent.	A Custom FAQ Agent* (Custom Agent) searches enterprise knowledge sources and generates contextual responses using generative AI. Responses are sent directly to customers, with ambiguous or high-risk queries escalated to a Support Specialist .
Product Configuration	The Sales Rep drafts configuration options in Copilot in Word , based on customer requirements. A Sales Engineer validates the specifications before they are shared.	Recommended product configurations are generated by the Sales Research Agent* (Custom Agent) using product rules and customer inputs. The Sales Engineer reviews and confirms the final configuration.	Product compatibility and pricing are validated by the Product Configurator and Quote Automation Agent* (Custom Agent), which generates the configuration and quote. CRM and ERP systems are updated automatically, with exceptions routed to a Technical Specialist .
Order Status Updates	Copilot in Outlook drafts personalized order status updates from ERP data. The Sales Reps reviews the message and sends it manually.	Real-time order status is pulled by the Sales Order Agent in Dynamics 365* (Custom Agent) and converted into a customer-ready update. The Sales Rep reviews and approves the message.	Order status is monitored in real time by the Order Status Copilot Agent* (Custom Agent) and delivered through a self-service portal or chatbot. Proactive delay notifications are issued, and anomalies are routed to an Operations Analyst .
Returns Initiation	The Customer Service Rep drafts return instructions and policy summaries using Copilot in Word . The information is reviewed and provided to the customer by the Customer Service Rep .	Return forms are pre-filled and next steps suggested by the Sales Order Agent for Dynamics 365* (Custom Agent) based on policy. The Sales Rep confirms and submits the return.	Eligibility and warranty checks are performed by the Returns Orchestration Agent* (Custom Agent) before return labels and pickup schedules are generated. Inventory and ERP systems are updated, with policy exceptions handled by a Returns Specialist .
Upsell Recommendations	Upsell ideas are generated by the Sales Rep in Copilot in PowerPoint to support and shape the sales pitch. The Sales Rep refines the messaging ahead of the customer conversation.	Bundled offers and personalized messaging are proposed by a Sales Agent* (Custom Agent) The Sales Rep reviews the recommendation and sends the final outreach.	Customer data platform signals, purchase history, and usage telemetry are analyzed by the Cross-Sell and Upsell Agent* (Custom Agent) to generate personalized offers. Offers are executed automatically, with complex negotiations escalated to an Account Manager .
Cumulative Success Metrics <small>(measured at workflow or overall process level; former useful for tracking but latter a better indicator of actual process improvement)</small>	Usage <ul style="list-style-type: none"> Reduction in time: Drafting customer responses Improvement in response quality & consistency Increased throughput: Customer interactions 	KPIs Impacted <ul style="list-style-type: none"> Turnaround time: Standard customer requests Volume of manually handled service interactions Accuracy of responses from enterprise knowledge % of requests completed without rework 	Workflow Automated <ul style="list-style-type: none"> % of customer interactions handled autonomously Reduction in total cost-to-serve Reduced volume of exception handling

AI-Driven Lead Scoring and Nurture Automation

*Custom built agents

	PATTERN 1	PATTERN 2	PATTERN 3
	Human uses Copilot	Human uses agent, reviews, and approves output	Humans set direction and agents run entire workflows
Lead Data Enrichment	Using Copilot in Dynamics 365 , the Sales Rep summarises lead data, drafts prioritization notes, and identifies next best actions based on historical performance. The Sales Rep reviews insights and determines follow-up actions manually.	Lead scoring is performed by the Sales Qualification Agent in Dynamics 365* (Custom Agent) using machine learning models. Priority leads and engagement plans are generated and reviewed by the Sales Rep before execution.	An AI Lead Scoring and Routing Agent* (Custom Agent) continuously scores inbound leads in real time and routes high-priority leads to Sales Reps . Nurture sequences are triggered automatically, with anomalies escalated for review by the Sales Rep .
Nurture Email Journey Orchestration	Personalized nurture email templates are drafted using Copilot Chat , with timing recommendations informed by engagement history. The Sales Rep reviews and schedules communications.	Multi-step nurture journeys are designed by the Researcher Agent , which selects content blocks and sequencing. The Sales Rep approves the journey and schedules launch.	Nurture journeys are managed end-to-end by a Nurture Orchestration Agent* (Custom Agent) , which optimizes send times and dynamically adjusts content based on engagement signals. Spikes in unsubscribe or negative engagement are escalated to the Sales Rep .
Webinar/Event Invitation Targeting	The Sales Rep creates invite lists for webinars and events by summarising CRM data with Copilot Chat . Outreach messages are drafted in Copilot in Outlook before being reviewed and sent by the Sales Rep .	Prioritized invite lists are generated by Copilot for Sales and Marketing* (Custom Agent) using demographic, firmographic, and engagement data. The Sales Rep validates the audience before invitations are sent.	Event invite targeting and follow-up are handled by the Event Engagement Orchestrator Agent* (Custom Agent) , which selects attendees, sends invitations, and manages responses. Capacity or overbooking issues are escalated to the Sales Rep .
Next Best Action Recommendations	Next best actions are suggested by the Customer Intent Agent in Dynamics 365 based on lead activity and sales stage. The Sales Rep then decides which actions to execute.	Recommended next best actions are produced by the Quality Evaluation Agent in Dynamics 365* (Custom Agent) , including rationale and drafted outreach content. The Seller reviews and approves execution.	Next best actions are executed automatically by a Sales Agent* (Custom Agent) across email, chat, and social channels, with activity logged centrally. Engagement drops below defined thresholds are flagged for intervention by the Sales Rep .
Upsell/Cross-Sell Triggering	Account and purchase history are analyzed by the Quality Evaluation Agent in Dynamics 365 to draft upsell or cross-sell pitch ideas. The Sales Rep reviews and refines the proposal.	Upsell opportunities are identified by the Sales Qualification Agent in Dynamics 365* (Custom Agent) , which drafts proposals and suggests optimal timing. The Sales Rep approves before sending.	Upsell offers are triggered autonomously by a Sales Engagement Agent* (Custom Agent) during self-service interactions or post-purchase journeys. Negative sentiment or high-risk scenarios are escalated to an Account Manager .
Cumulative Success Metrics <small>(measured at workflow or overall process level; former useful for tracking but latter a better indicator of actual process improvement)</small>	Usage <ul style="list-style-type: none"> Reduction in time: Reviewing & prioritizing leads Improvement in relevance: Outbound sales engagement Increased throughput: Nurture communications 	KPIs Impacted <ul style="list-style-type: none"> Turnaround time: Lead qualification & follow-up Volume of manually scored or prioritized leads Accuracy: Lead scoring & targeting % of nurture journeys executed without rework 	Workflow Automated <ul style="list-style-type: none"> % of lead scoring & routing handled autonomously % of nurture journeys executed end-to-end by agents Reduction in total cost-to-serve Reduced volume of exception handling

AI-Based Customer Retention, Renewal, and Upsell

*Custom built agents

	PATTERN 1	PATTERN 2	PATTERN 3
	Human uses Copilot	Human uses agent, reviews, and approves output	Humans set direction and agents run entire workflows
Churn Risk Detection	The Customer Success Manager summarizes Customer health data using Copilot Chat to surface churn risk signals and draft risk reports. The output is reviewed by the Customer Success Manager before follow-up actions are taken.	The Customer Success Manager uses the Analyst Agent to assess churn risk. The Agent analyzes customer data and flags at-risk accounts. The Customer Success Manager reviews alerts and confirms risk status.	Customer accounts are continuously monitored by the Customer Lifecycle Intelligence Agent* (Custom Agent) , to detect churn risk and trigger retention playbooks. Ambiguous signals or edge cases are escalated to the Customer Success Manager .
Renewal Opportunity Planning	Renewal pipelines are compiled by the Account Manager in Copilot in Excel , including renewal timelines and suggested talking points. The Account Manager reviews the information and plans outreach.	The Account Manager forecasts renewal dates, prioritizes accounts, and drafts recommended engagement plans using the Analyst Agent . The Account Manager reviews and approves the outreach sequence.	Renewal calendars are managed end-to-end by the Renewal Orchestrator Agent* (Custom Agent) , which triggers outreach and coordinates renewal steps. Complex negotiations or exceptions are escalated to the Account Manager .
Upsell/Cross-Sell Recommendation	The Account Executive analyzes purchase history using a Sales Agent* (Custom Agent) to suggest upsell or cross-sell ideas and draft pitch notes. The Account Manager then refines the proposal prior to customer engagement.	Upsell opportunities are identified by the Analyst Agent , which the Account Manager uses to draft proposals and recommends timing. The Account Executive reviews and approves offers before sending.	Upsell offers are delivered by the Upsell Insight Agent* (Custom Agent) , during customer interactions, with recommendations personalised in real time. Negative sentiment or objections are escalated to the Account Executive .
Outreach Sequencing & Execution	The Sales Operations Specialist drafts personalised outreach emails and call scripts in Copilot in Outlook , with timing recommendations based on engagement history. They then review and executes outreach.	The Sales Operation Specialist asks the Project Manager Agent* (Custom Agent) to design multi-step outreach sequences, schedule communications, and tracks responses. Adjustments are reviewed by the Sales Operations Specialist as needed.	Outreach campaigns are executed autonomously by the Sales Agent* (Custom Agent) , which optimizes timing and content across channels. Drops in response rates are flagged for intervention to the Sales Operations Specialist .
Success Tracking & Reporting	Renewal and upsell outcomes are summarized by the Sales Operations Specialist in Copilot in Excel , with key metrics highlighted for review. Reports are reviewed manually to track performance.	Performance data is aggregated by Sales Operations Specialist using the Analyst Agent to generate dashboards and surface underperforming segments. Insights are validated by Sales Operations Specialist before action is taken.	Dashboards and KPIs are updated continuously by the Analyst Agent , with outcomes logged automatically. Data anomalies or gaps are escalated to Sales Operations Specialist for review.
Cumulative Success Metrics <small>(measured at workflow or overall process level; former useful for tracking but latter a better indicator of actual process improvement)</small>	Usage <ul style="list-style-type: none"> Reduction in time: Renewal & retention materials Improvement in relevance: Upsell & renewal outreach Increased throughput: Customer engagement activities 	KPIs Impacted <ul style="list-style-type: none"> Turnaround time: Renewal planning & follow-up Volume of manually reviewed churn risk signals Accuracy: Renewal forecasting and prioritization % of outreach sequences executed without rework 	Workflow Automated <ul style="list-style-type: none"> % of renewal & retention workflows handled autonomously % of upsell offers triggered & executed by agents Reduction in total cost-to-serve for post-sale engagement Reduced volume of exception handling

Predictive Sales Forecasting and Pipeline Insights

*Custom built agents

	PATTERN 1	PATTERN 2	PATTERN 3
	Human uses Copilot	Human uses agent, reviews, and approves output	Humans set direction and agents run entire workflows
Data Aggregation & Cleansing	The Sales Operation Analyst summarizes CRM data in Copilot Chat to support pipeline analysis and manual export opportunity lists. The Sales Operations Analyst reviews and prepares the data for downstream use.	The Sales Operations Analyst uses the Analyst Agent to aggregate CRM, ERP, and marketing data, and flag anomalies and proposed corrections. The Sales Operation Analyst then reviews and approved the updates before application.	Multi-source sales data is continuously ingested by a Sales Data Integrity Agent* (Custom Agent), which validates data quality and corrects errors in real time. Only critical anomalies are escalated to the Sales Operation Analyst .
Forecast Generation	The Finance Analyst drafts forecast summaries in Copilot in Excel based on historical performance data. They then adjusts assumptions and final figures manually.	Predictive models are run by the Finance Analyst using the Analyst Agent to generate forecast scenarios and recommended adjustments. Forecast changes are reviewed and approved by the Finance Analyst .	Forecasts are generated and updated dynamically by a Sales Forecasting Agent* (Custom Agent), integrating external market signals. Deviations trigger alerts and dashboards are adjusted automatically by the Finance Agent .
Pipeline Risk Analysis	The Sales Rep summarizes deal health indicators in Copilot in Word , drawing from CRM notes and activity history. They manually interpret risk using their own judgement.	The Sales Rep uses the Analyst Agent to apply pipeline risk scoring using machine learning models. Suggested mitigation actions are reviewed by the Sales Rep before execution.	Pipeline risk is monitored continuously by a Sales Risk and Recovery Agent* (Custom Agent) using ML-driven models. Recovery workflows are initiated automatically, with strategic deals escalated to the Sales Rep .
Scenario Planning & What-If	The FP&A Analyst drafts scenario summaries in Copilot in Excel using manually defined inputs. The FP&A Analyst then runs calculations offline to assess impact.	The FP&A Analyst uses the Analyst Agent to simulate multiple scenarios using historical and external data sources. Ranked recommendations are reviewed and approved by the FP&A Analyst .	Budgets, capacity, and pipeline scenarios are simulated autonomously by a Sales Agent and Simulation Agent* (Custom Agent) working in tandem. Governance is applied only for high-impact changes.
Executive Reporting & Insights	The Sales Operations Manager uses Copilot in Excel to drafts executive summary slides from CRM exports. The Sales Operations Manager edits, formats, and finalizes materials for leadership.	The Sales Operations Manager uses the Analyst Agent to generate dashboards and narrative insights for executive review. The Sales Leader validates insights prior to distribution.	Real-time reporting is delivered by a Sales Analyst Agent* (Custom Agent), with insights published automatically to leadership. Compliance-sensitive disclosures are escalated for review to the Sales Operations Manager .
Cumulative Success Metrics <small>(measured at workflow or overall process level; former useful for tracking but latter a better indicator of actual process improvement))</small>	Usage <ul style="list-style-type: none"> Reduction in time: forecasts & pipeline summary Improved clarity: Forecast assumptions & deal health Increased throughput: Reporting & analysis activities 	KPIs Impacted <ul style="list-style-type: none"> Turnaround time: Forecast updates & adjustments Volume of manually reviewed data anomalies Accuracy: Forecast scenarios & pipeline risk signals % of insights delivered without rework 	Workflow Automated <ul style="list-style-type: none"> % of renewal & retention workflows handled autonomously % of upsell offers triggered & executed by agents Reduction in total cost-to-serve for post-sale engagement Reduced volume of exception handling

AI-Curated Sales Enablement and Playbooks

*Custom built agents







	PATTERN 1	PATTERN 2	PATTERN 3
	Human uses Copilot	Human uses agent, reviews, and approves output	Humans set direction and agents run entire workflows
Playbook Creation	The Sales Manager uses Copilot in Word to draft enablement playbooks with structured guidance and messaging. The Sales Manager reviews and edits content manually.	Playbook templates are generated by a Sales Agent* (Custom Agent) using CRM data and historical performance. The Sales Enablement Lead reviews and approves content before release.	Playbooks are generated and updated automatically by a Sales Enablement Agent* (Custom Agent) using CRM signals and product updates. Content anomalies are escalated to the Sales Enablement Lead .
Content Curation	Latest sales collateral is identified by the Marketing Manager through manual search across SharePoint. They then use Copilot Chat to summarize and consolidate materials.	Relevant enablement content is curated by the Researcher Agent across SharePoint and Dynamics sources. Suggested updates are approved by the Marketing Manager .	Enablement content is curated, tagged, and published autonomously by a Sales Enablement Agent* (Custom Agent) across Teams and CRM. Compliance-related exceptions are escalated to the Compliance Officer .
Recommendation Generation	The Account Executive uses Copilot in Excel to manually analyze pipeline data that supports recommendation development. The Account Executive drafts and refines suggested actions.	The Account Executive uses the Analyst Agent to generate upsell and cross-sell recommendations using CRM and usage data. The Account Executive reviews and approves actions.	Personalized recommendations are executed by a CRM Offer Orchestration Agent* (Custom Agent) triggering offers directly within CRM. Anomalies are escalated to the Sales Operations Manager .
Performance Insights	Performance reports are pulled manually from Power BI by the Sales Operations Manager . Copilot Chat is then used to summarize trends and reviewed by the Sales Operations Manager .	Insights dashboards are generated by Copilot in Power BI to surface performance trends. The Sales Operations Manager reviews and shares insights with leadership.	Campaign performance is monitored continuously by a Sales Performance Insights Agent* (Custom Agent) which sends alerts and optimises campaigns automatically. Critical deviations are escalated to the Sales Operations Manager .
Continuous Optimization	The Sales Enablement Lead reviews 'Enablement Effectiveness' every quarter using manual analysis. They use Copilot Chat to draft improvement actions for the following quarter.	Optimization actions are proposed by Copilot for Sales* (Custom Agent) based on engagement metrics. The Sales Enablement Lead approves changes before implementation.	Workflows and playbooks are continuously optimized by a Sales Agent* (Custom Agent) which retrains models and updates guidance. Exceptions are escalated to the Sales Enablement Manager .
Cumulative Success Metrics <small>(measured at workflow or overall process level; former useful for tracking but latter a better indicator of actual process improvement)</small>	Usage <ul style="list-style-type: none"> Reduction in time: Creating & updating enablement content Improved accessibility of sales playbooks & collateral Increased utilisation of enablement materials by sellers 	KPIs Impacted <ul style="list-style-type: none"> Turnaround time: Playbook updates & recommendations Volume of manually curated enablement content % of enablement actions executed without rework 	Workflow Automated <ul style="list-style-type: none"> % of enablement & recommendation workflows handled autonomously % of content curation & publishing executed by agents Reduction in operational effort: Sales enablement management Reduced volume of exception handling

Marketing Function



Top Scenarios for Marketing Transformation

As you mature in your Frontier Firm journey...work evolves from human-led Copilot assistance, to agent-supported decisions, and ultimately to agent-executed workflows with humans providing oversight, judgment, and exception handling.

Scenarios	Key processes	Products	Success Metrics
<p>Predictive Audience Targeting & Budget Optimization</p>	<p>Identify high-propensity audiences & reallocate spend to channels most likely to convert</p>	 Copilot Chat  M365 Copilot  Dynamics 365 Sales  Analyst Agent  Researcher Agent  Copilot Studio Agents	<ul style="list-style-type: none"> ✓ Faster execution across core marketing work ✓ Higher quality, more consistent marketing outputs ✓ More marketing activities completed at scale ✓ Stronger demand and conversion signals ✓ Clearer visibility into campaign performance and results ✓ Broader automation across marketing workflows
<p>Content & Asset Generation</p>	<p>Create first drafts, creative variations & brand-safe adaptations. Reduce production cycles; keep messaging consistent across formats/ markets.</p>		
<p>Marketing Performance Forecasting & ROI Insights</p>	<p>Surface likely outcomes, flag under-performing segments & recommend next-best optimisation actions.</p>		
<p>Real-Time Personalization</p>	<p>Deliver tailored messaging, offers & journeys across web, email & ads to increase engagement/ conversion through individual-level relevance.</p>		
<p>Insight Mining & Trend Intelligence</p>	<p>Extract signals from customer conversations, market data & social channels. Surface emerging needs, competitor shifts & sentiment trends that inform go-to-market strategy.</p>		

Click [here](#) for additional details on scenarios, product information, and success metrics.

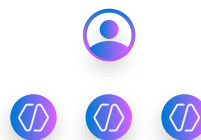
Campaign Brief Drafting

Pattern 1



Campaign briefs are drafted by the **Content Marketing Specialist** using stakeholder inputs. **Edit with Copilot in Word** helps summarize guidelines and refine structure, while research and approvals remain manual.

Pattern 2



Audience insights, competitive benchmarks, and draft briefs are generated collaboratively by the **Researcher Agent** and **Analyst Agent**. The **Content Marketing Specialist** reviews and approves the brief, adding strategic nuance.

Pattern 3



Audience data, trend insights, and campaign briefs are generated by the **Researcher Agent** and **Marketing Brief Agent (Custom Agent)** using brand-aligned templates, with strategic or tone issues escalated to the **Marketing Program Manager**.

Predictive Audience Targeting & Budget Optimization

*Custom built agents

	PATTERN 1	PATTERN 2	PATTERN 3
	Human uses Copilot	Human uses agent, reviews, and approves output	Humans set direction and agents run entire workflows
Audience Segmentation	CRM data is manually extracted by the Marketing Operations Specialist and summarized in Copilot in Excel to surface engagement trends. Targeting lists are drafted and reviewed by the Marketing Operations Specialist for campaign use.	Audience segments are clustered by the Marketing Operations Specialist using the Researcher Agent and predictive scoring techniques. Segment definitions are reviewed and approved by the Campaign Manager before activation.	Customer segments are continuously updated by a Customer Intent Agent* (Custom Agent) and Segmentation Agent* (Custom Agent), using real-time behavioral signals. Marketing Manager intervention is limited to strategic overrides or compliance exceptions.
Predictive Scoring	The Marketing Operations Specialist uses Copilot Chat to analyze historical campaign data in order to support manual lead ranking based on engagement metrics. Prioritization decisions are made manually by the Marketing Operations Specialist .	Predictive lead scores are generated by the Marketing Operations Specialist using the Analyst Agent via machine learning models. Top-tier leads and scoring thresholds are then validated by the Marketing Manager .	Lead scoring models are recalibrated dynamically by an Autonomous Scoring Agent* (Custom Agent), prioritizing leads across channels. Anomalies are escalated to the Marketing Analytics Manager or via governance dashboards.
Budget Allocation	The Marketing Operations Specialist uses Copilot in Power BI to visualize campaign performance trends and inform budget adjustments. Budget changes are then applied manually across campaigns by the Marketing Operations Specialist .	The Marketing Operations Manager uses Analyst Agent to propose budget split recommendations based on predicted ROI. Reallocations are reviewed and approved by the Marketing Operations Manager before execution.	Budget reallocation is executed automatically by a Budget Agent* (Custom Agent) using performance and forecast signals. High-risk shifts or compliance checks are escalated for review by the Marketing Manager .
Campaign Optimization	Channel performance and creative KPIs are monitored manually by the Marketing Operations Specialist , with Copilot Chat used to draft optimization suggestions. The changes are reviewed and shared with relevant teams by the Marketing Operations Specialist .	The Marketing Operations Specialist uses a Campaign Analyst Agent* (Custom Agent), to propose creative variations and bid adjustments. Changes are approved by the Campaign Manager prior to deployment.	Campaign optimization is handled end-to-end by an Autonomous Campaign Agent* (Custom Agent), which runs tests, reallocates bids, and optimizes creatives in real time. The Campaign Manager reviews exception reports only.
Performance Monitoring	The Marketing Operations Specialist compiles performance reports manually and uses Copilot Chat to summarize key metrics. Insights are reviewed and shared with leadership by the Marketing Operations Specialist during reporting cycles.	The Marketing Operations Specialist generates dashboards and predictive insights using the Analyst Agent with anomaly detection applied. Quarterly reviews are validated by the Marketing Manager .	Performance alerts are triggered by an Autonomous Performance Agent* (Custom Agent) for deviations, compliance breaches, or elevated risk scores. Marketing Manager intervention is limited to governance or strategic decisions.
Cumulative Success Metrics <small>(measured at workflow or overall process level; former useful for tracking but latter a better indicator of actual process improvement)</small>	Usage <ul style="list-style-type: none"> Reduction in time: Preparing targeting lists and reports Increased AI adoption: Across campaign planning activities Improved clarity: Performance reporting and insights 	KPIs Impacted <ul style="list-style-type: none"> Cycle time: Audience segmentation & activation Conversion performance: Agent-assisted targeting Accuracy: Predictive scoring versus outcomes Volume of agent outputs requiring correction 	Workflow Automated <ul style="list-style-type: none"> % of demand-generation workflows executed end-to-end by agents Improvement in campaign ROI relative to manual baselines Adherence to governance and compliance thresholds Reduction in human intervention Scalability of campaign execution during demand spikes

AI-Assisted Content and Asset Generation

*Custom built agents

	PATTERN 1	PATTERN 2	PATTERN 3
	Human uses Copilot	Human uses agent, reviews, and approves output	Humans set direction and agents run entire workflows
Campaign Brief Drafting	Campaign briefs are drafted by the Content Marketing Specialist using stakeholder inputs. Copilot in Word helps summarize guidelines and refine structure, while research and approvals remain manual.	Audience insights, competitive benchmarks, and draft briefs are generated collaboratively by the Researcher Agent and Analyst Agent . The Content Marketing Specialist reviews and approves the brief, adding strategic nuance.	Audience data, trend insights, and campaign briefs are generated by the Researcher Agent and Marketing Brief Agent* (Custom Agent) using brand-aligned templates, with strategic or tone issues escalated to the Marketing Program Manager .
Creative Asset Generation	The Creative Designer manually creates assets using design tools. Copilot in PowerPoint or Designer is then used for layout suggestions and text polish.	Multiple creative variations are produced with support from a Creative Generation Agent , while a Compliance Agent* (Custom Agent), flags potential risks. Final assets are approved by the Brand Marketing Manager .	Creative assets are generated at scale by a Creative Content and Corporate Communications Agent* (Custom Agent), using approved templates. A Compliance Agent* (Custom Agent) enforces brand rules and escalates anomalies to relevant teams for specialist review.
Content Localization	Content is translated and adapted for each region by the Localization Manager . Then Copilot Chat is used to refine language and adjust tone before review and sign off by the Localization Manager .	The Localization Manager uses the Localization Agent* (Custom Agent), to generate localized versions of content as well as cultural adaptations. The Localization Manager reviews and approves final outputs.	Content is localised end-to-end by the Localization Agent* (Custom Agent), across markets, with cultural tone and compliance checks applied automatically. Regional Leads intervene only for flagged exceptions.
Compliance Review	Assets are reviewed manually by the Marketing Specialist using brand and regulatory guidelines, and compliance rules that have been summarized using Copilot Chat .	Assets are scanned for brand and regulatory violations by the Marketing Specialist using the Compliance Agent* (Custom Agent). The Marketing Specialist approves or overrides recommendations before release.	Compliance is enforced automatically during asset generation and localisation by the Compliance Governance Agent* (Custom Agent). Legal or regulatory escalations are routed to relevant teams for judgement.
Performance Optimization	The Marketing Analyst uses Copilot in Excel or Power BI to summarize performance trends and propose improvements, then reviews and shares the findings with relevant teams.	Growth Marketing Manager generates optimization recommendations with the Analyst Agent based on engagement metrics. The Growth Marketing Manager then approves updates and applies changes to campaigns.	Performance is monitored continuously by the Marketing Performance Agent* (Custom Agent), which adjusts targeting and creative variations in real time. Strategic anomalies, such as major budget shifts, are escalated to the Growth Marketing Manager .
Cumulative Success Metrics <small>(measured at workflow or overall process level; former useful for tracking but latter a better indicator of actual process improvement)</small>	Usage <ul style="list-style-type: none"> Reduction in time: Drafting briefs & creative assets Increased AI adoption: Content creation tasks Improved clarity & consistency of campaign assets 	KPIs Impacted <ul style="list-style-type: none"> Workflow turnaround time: Content creation & approval Adoption rate: Agent-generated suggestions Accuracy of audience insights against performance outcomes Reduction in compliance risk incidents % of outputs approved without rework 	Workflow Automated <ul style="list-style-type: none"> % of content creation & localization handled autonomously Reduction in exception handling Compliance adherence across automated delivery Consistency of brand execution across markets Reduced frequency of strategic human intervention

Marketing Performance Forecasting & ROI Insights

*Custom built agents

	PATTERN 1	PATTERN 2	PATTERN 3
	Human uses Copilot	Human uses agent, reviews, and approves output	Humans set direction and agents run entire workflows
Data Aggregation & Normalization	Campaign data is pulled manually by the Marketing Analyst from CRM, ad platforms, and web analytics sources. Copilot in Excel is used to clean and normalize data and create pivot tables for initial insights.	Data from CRM, advertising platforms, and analytics tools is aggregated by the Analyst Agent using connectors and normalization rules. The consolidated dataset is reviewed and approved by the Marketing Analyst before analysis.	Marketing data is ingested continuously by a Data Integration Agent* (Custom Agent) , which applies normalization rules and updates a centralised data lake. Exceptions, such as missing fields, trigger alerts for review by the Marketing Analyst .
Performance Trend Analysis	The Marketing Manager analyzes historical campaign performance using Copilot in Excel or Power BI to identify trends and top-performing channels. Trend summaries and charts are then drafted by the Marketing Analyst for leadership review.	Performance trends are analyzed by the Analyst Agent using predictive algorithms to surface emerging patterns. Insights and optimization recommendations are validated by the Marketing Analyst prior to sharing for leadership review..	Campaign performance is monitored in real time by a Trend Analysis Agent* (Custom Agent) , which updates dashboards and flags anomalies automatically. Intervention occurs only for significant deviations.
ROI Modeling & Forecasting	ROI models are built manually in Excel by the Marketing Analyst , with Copilot in Excel supporting formula suggestions and scenario calculations. The first-pass summaries are drafted for review by relevant teams.	Predictive ROI models are generated collaboratively by the Analyst Agent and Researcher Agent using historical data and benchmarks. Model accuracy and recommendations are reviewed by the Marketing Analyst before approval.	ROI projections are updated dynamically by a ROI Forecasting Agent* (Custom Agent) , which recalibrates models based on live data. Budget reallocation workflows are triggered automatically.
Scenario Simulation & Budget Optimization	The Marketing Analyst simulates What-if scenarios in Copilot in Excel based on defined budget adjustments. Recommendations are prepared manually by the Marketing Analyst for leadership consideration.	Multiple budget and performance scenarios are simulated by the Analyst Agent and ranked by projected ROI. Top scenarios are first reviewed and approved by the Marketing Analyst before sharing with leadership for execution.	Scenario testing and budget optimisation are executed continuously by a Simulation Agent* (Custom Agent) , applying optimisation rules and reallocating budgets across campaigns. Human input is limited to governance oversight.
Executive Reporting & Insights Delivery	Insights are compiled into Copilot in PowerPoint by the Marketing Analyst , to summarize findings and draft a narrative. Visualizations and messaging are finalized manually by the Marketing Analyst .	Executive-ready reports are generated by a Reporting Agent* (Custom Agent) integrated with Power BI and Excel. The Marketing Analyst personalizes messaging and approves distribution.	Executive dashboards and summaries are published automatically by a Reporting Agent* (Custom Agent) . Strategic anomalies are escalated for the Marketing Analyst to review.
Cumulative Success Metrics <small>(measured at workflow or overall process level; former useful for tracking but latter a better indicator of actual process improvement)</small>	Usage <ul style="list-style-type: none"> Reduction in time: Preparing forecasts and reports Increased AI adoption: Performance analysis tasks Improved clarity: Forecasting assumptions & insights 	KPIs Impacted <ul style="list-style-type: none"> Cycle time: Forecast updates & scenario evaluation Accuracy: Predictive models versus actual performance Conversion impact from agent-driven recommendations Approval turnaround time: Agent-generated insights Utilisation rate of assistive agents across workflows 	Workflow Automated <ul style="list-style-type: none"> % of forecasting & optimization tasks executed autonomously Improvement in marketing ROI Reduction in escalations requiring human review Compliance adherence across automated decisions Scalability of performance management across campaigns

Real-Time Personalization Experience Engine

*Custom built agents

	PATTERN 1	PATTERN 2	PATTERN 3
	Human uses Copilot	Human uses agent, reviews, and approves output	Humans set direction and agents run entire workflows
Campaign Brief Drafting	Campaign briefs are drafted in Copilot in Word by the Marketing Manager using brand guidelines as reference. Copilot Chat is used to summarize prior campaign performance and suggest initial creative themes.	Audience insights and competitive benchmarks are pulled by the Researcher Agent after the brief is initiated in Copilot in Word . KPI suggestions and budget allocations are proposed by the Analyst Agent and reviewed by the Marketing Manager before finalization.	Campaign briefs are created autonomously by a Creative Agent* (Custom Agent) using real-time CRM and analytics data. The Marketing Manager intervenes only for strategic pivots or anomalies flagged by the Brand Compliance Agent* (Custom Agent) .
Creative Asset Generation	The Marketing Manager develops creative concepts in Copilot in PowerPoint with Copilot Chat supporting alternative taglines and summarized creative guidelines. Final concepts are selected by the Marketing Manager .	Creative variations are generated by the Creative Agent* (Custom Agent) , with the Brand Compliance Agent* (Custom Agent) flagging tone and inclusivity risks. The Marketing Manager approves final assets for production.	Creative assets are produced at scale by a Creative Agent* (Custom Agent) while a Brand Compliance Agent* (Custom Agent) applies brand, accessibility, and inclusivity rules. Only tone or cultural sensitivity exceptions are escalated to the Marketing Manager .
Content Localization	Content is adapted for regional markets by the Marketing Manager , with Copilot Chat supporting translation and summarization of cultural guidelines. Local adaptations are applied manually by the Marketing Manager .	Localized content is generated collaboratively with the Localization Agent* (Custom Agent) , which surfaces regional nuances. The Marketing Manager reviews and approves content prior to publishing.	Content is localized automatically across markets by a Localization Agent* (Custom Agent) applying linguistic and cultural rules. High-risk cultural misalignment is escalated for review to the Marketing Manager .
Compliance Review	Brand and regulatory checks are performed by the Marketing Manager using Copilot Chat to summarize compliance checklists. Final review and approvals are carried out by the Marketing Manager .	Compliance recommendations are surfaced by a Brand Compliance Agent* (Custom Agent) , highlighting potential risks and mitigations. The Marketing Manager reviews and approves required edits.	A Brand Compliance Agent* (Custom Agent) enforces compliance rules automatically throughout content creation and publishing. Escalations to the Marketing Manager occur only for ambiguous regulatory interpretations.
Performance Optimization	Campaign performance is analyzed in Copilot in Excel by the Marketing Manager to summarize trends and suggest optimization ideas. Optimization decisions are reviewed and made manually the Marketing Manager .	Predictive performance insights and budget reallocation recommendations are generated by the Analyst Agent . Optimization actions are reviewed and approved by the Marketing Manager before execution.	Campaign performance is monitored and optimized in real time by a Campaign Intelligence Agent* (Custom Agent) , adjusting spend and creative delivery. The Marketing Manager intervenes only for strategic shifts or high-risk budget changes.
Cumulative Success Metrics <small>(measured at workflow or overall process level; former useful for tracking but latter a better indicator of actual process improvement)</small>	Usage <ul style="list-style-type: none"> Reduction in time: Drafting briefs & creative concepts Improved quality & consistency of creative outputs Increased AI adoption: Personalization tasks & workflows 	KPIs Impacted <ul style="list-style-type: none"> Cycle time: Brief-to-asset approval Quality: Agent-generated creative outputs % of automation across personalization steps Frequency of escalations requiring manual intervention Collaboration satisfaction: Between marketers & agents 	Workflow Automated <ul style="list-style-type: none"> % of personalization workflows executed end-to-end by agents Reduction in exception handling time Accuracy of risk mitigation across compliance & cultural checks Performance uplift from autonomous optimization Frequency of strategic human overrides

AI-Powered Insight Mining & Trend Intelligence

*Custom built agents







	PATTERN 1	PATTERN 2	PATTERN 3
Insight Intake & Research Brief	<p>Human uses Copilot</p> <p>Internal reports and external research links are consolidated by the Content Marketing Specialist in Word. Then Copilot in Word summarizes prior campaign performance, surfaces creative themes, and drafts a first-pass research brief, which is reviewed and approved by the Chief Marketing Officer.</p>	<p>Human uses agent, reviews, and approves output</p> <p>A research brief is initiated in Copilot in Word, with the Researcher Agent aggregating competitor and industry signals. The Analyst Agent clusters themes and proposes audience segments, while the Compliance Agent* (Custom Agent) flags regulatory considerations; outputs are reviewed and approved by the Chief Marketing Officer.</p>	<p>Humans set direction and agents run entire workflows</p> <p>Trusted internal and external sources are continuously scanned by Researcher Agent and Analyst Agent to build and refresh insight briefs. The Compliance Agent* (Custom Agent) flags regulatory or brand-sensitive issues, with the Marketing Manager intervening only for anomalies or strategic shifts.</p>
Competitor & Market Trend Scan	<p>Competitor launches, pricing, and messaging are compiled manually by the Marketing Manager. They then use Copilot in Excel or Word to summarize trends and highlight implications for positioning, with directional decisions validated by the Chief Marketing Officer.</p>	<p>Earnings calls, press releases, and social chatter are ingested by the Researcher Agent to identify momentum and risk. The Analyst Agent scores trends, with compliance checks applied before insights are drafted for executive review.</p>	<p>Dashboards and recurring trend intelligence packs are generated autonomously by a Workforce Insights Agent and distributed weekly. The Agent enriches market views with frontline and customer service signals, with exceptions escalated for review to the Marketing Manager.</p>
Audience Sentiment & Channel Intelligence	<p>The Digital Marketing Specialist performs social listening and checks search trend data and uses Copilot Chat to summarize sentiment signals and channel recommendations. Review and approval is carried out by the Chief Marketing Officer.</p>	<p>Multi-lingual sentiment classification is performed by the Analyst Agent. Next, a People Agent* (Custom Agent) is used to surface internal SMEs for rapid review and validation, while the Compliance Agent* (Custom Agent) suggests edits. Final approval is carried out by the Chief Marketing Officer.</p>	<p>Sentiment is monitored continuously across regions and channels by a Localization and Compliance Agent* (Custom Agent), with culturally appropriate variants proposed. The Marketing Manager involvement is limited to sentiment spikes or sensitive cases.</p>
Performance Optimization & Trend Feedback Loop	<p>Content Marketing Specialist reviews post-launch analytics to assess performance and emerging trends. They use Copilot Chat to support review and summarize learnings and suggest next-cycle optimizations. The Chief Marketing Officer confirms budget shifts and messaging tweaks.</p>	<p>Performance data is fused by the Workforce Insights Agent* (Custom Agent) and Analyst Agent to connect market signals with execution outcomes. Optimization actions are reviewed and approved by the Chief Marketing Officer.</p>	<p>Campaign mix and creative variants are adjusted automatically by a Performance Insights Agent* (Custom Agent) within defined guardrails. The Chief Marketing Officer intervenes only for major budget reallocations or compliance escalations.</p>
<p>Cumulative Success Metrics <small>(measured at workflow or overall process level; former useful for tracking but latter a better indicator of actual process improvement)</small></p>	<p>Usage</p> <ul style="list-style-type: none"> Reduction in time: From insight intake to approved brief Increased AI adoption: Research synthesis & summarization Improved consistency and clarity of insight outputs 	<p>KPIs Impacted</p> <ul style="list-style-type: none"> Cycle time: Insight generation to approval Precision: Agent-led classification & clustering Coverage: Research, sentiment, & compliance tasks handled by agents Approval turnaround time: Agent-generated insights Effectiveness of anomaly detection prior to escalation 	<p>Workflow Automated</p> <ul style="list-style-type: none"> % of insight mining & trend analysis executed autonomously Reduction in time: Signal detection to action Policy adherence of automated insights % of workflows completed without human intervention Reduction in escalations through proactive risk mitigation

Customer Service Function



Top Scenarios for Customer Service Transformation

As you mature in your Frontier Firm journey...work evolves from human-led Copilot assistance, to agent-supported decisions, and ultimately to agent-executed workflows with humans providing oversight, judgment, and exception handling.

Scenarios	Key processes	Products	Success Metrics
Case Routing & Prioritization	Automate triage; analyze customer context, history & urgency to assign each case to best-fit rep to reduce wait times & improve resolution quality.	 Copilot Chat  M365 Copilot  Dynamics 365 Sales  Analyst Agent  Researcher Agent  Copilot Studio Agents	<ul style="list-style-type: none"> ✓ Faster execution across core service work ✓ Higher quality and consistency of customer responses ✓ More service interactions handled at scale ✓ Improved customer satisfaction and resolution outcomes ✓ Clearer visibility into issues, case trends, and performance ✓ Increased automation across service workflows
Issue Diagnosis and Root-Cause Analysis	Guide data-driven workflow, surface likely causes, recommended fixes & relevant knowledge. Cuts investigation time & repeat contacts.		
Resolution & Escalation Handling	Suggest validated fixes, auto-complete steps & trigger escalations when SLA risk is detected. Improve speed, consistency & reduce backlog.		
Service Quality & Continuous Improvement Insights	Detect recurring issues, emerging patterns & automation opportunities. Enable proactive reduction of inbound volume & cost-to-serve.		
Self-Service Assistant & Guided Troubleshooting	Deflect high-frequency queries to conversational and step-by-step self-service flows to improve customer satisfaction, reduce ticket load on support teams.		

Click [here](#) for additional details on scenarios, product information, and success metrics.

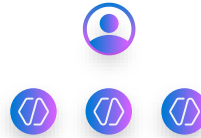
Process & Policy Gap Identification

Pattern 1



Workflow inefficiencies such as long resolution times or repeated escalations are highlighted using **Copilot Chat** when prompted. Root-cause analysis and prioritization are handled manually by the **Customer Service Representative**.

Pattern 2



Queues, handoffs, repeat contacts, and escalation paths are analyzed by the **Process Intelligence Analyst Agent (Custom Agent)**, which recommends targeted process or policy improvements. Recommendations are reviewed by the **Customer Service Representative** before action.

Pattern 3



Operational bottlenecks and breakdown risks are identified proactively by a **Process Optimization Agent (Custom Agent)**, which predicts issues and triggers remediation workflows.

Intelligent Case Routing & Prioritization

*Custom built agents

	PATTERN 1	PATTERN 2	PATTERN 3
Inbound Case Intake Processing	<p>Human uses Copilot</p> <p>New cases are reviewed manually by the Customer Service Representative in Dynamics 365. Copilot Chat summarizes case details, extracts key information, and surfaces recent interactions to support manual triage.</p>	<p>Human uses agent, reviews, and approves output</p> <p>Case text, attachments, and channel metadata are parsed by the Intake Analyst Agent* (Custom Agent), which pre-fills fields and suggests case type and routing attributes. The Customer Service Representative reviews and confirms adjustments.</p>	<p>Humans set direction and agents run entire workflows</p> <p>All inbound cases are processed autonomously by an Intake Agent* (Custom Agent) working with a Channel Listener Agent* (Custom Agent). Case records are created and normalized automatically, with Customer Service Representative intervention limited to ambiguous or incomplete submissions.</p>
Contextual Case Enrichment & Classification	<p>To understand context, the Customer Service Representative asks Copilot Chat to summarise customer history and classify the case. Prior tickets, entitlements, purchases, and recent activity are pulled to suggest a basic category and subcategory.</p>	<p>Contextual signals from CRM, telemetry, and the knowledge base are gathered by the Researcher Agent, while the Classification Analyst Agent* (Custom Agent) proposes multi-level classification. Recommendations are reviewed and approved by the Customer Service Representative.</p>	<p>Cases are continuously classified by an Autonomous Classification Agent* (Custom Agent) using telemetry correlation and sentiment signals. Low-confidence classifications are flagged for review by the Customer Service Representative.</p>
Priority Scoring & SLA Risk Assessment	<p>Priority signals such as keywords, severity hints, and SLA parameters are analyzed using Copilot Chat. Priority level and due dates are set manually by the Customer Service Representative.</p>	<p>Urgency and impact are scored by the SLA Risk Analyst Agent* (Custom Agent) using customer value, sentiment, channel, and historical behaviour. Priority and SLA risk recommendations are approved or adjusted by the Customer Service Representative before execution.</p>	<p>Priority and due dates are assigned automatically by an Autonomous SLA Prediction Agent* (Custom Agent) working with a Queue Load Balancing Agent* (Custom Agent). High-risk cases are escalated to the Customer Service Representative.</p>
Agent Matching & Routing Assignment	<p>Copilot Chat is used to suggest the best-fit agent or queue based on skills, language, and availability. The Customer Service Representative makes the final routing decision.</p>	<p>Routing recommendations are generated by the Routing Analyst Agent* (Custom Agent) using skills, certifications, capacity, and historical resolution performance. Customer Service Representatives provide single-click approval.</p>	<p>Cases are assigned and reassigned in real time by an Autonomous Routing Orchestrator Agent* (Custom Agent) in collaboration with a Workforce Optimization Agent* (Custom Agent). The Customer Service Representative overrides occur only for exceptional or sensitive cases.</p>
Exception Handling & Routing Optimization Loop	<p>Potentially misrouted or stalled cases are surfaced on request by the Customer Service Representative using Copilot Chat queries. Reassignment or escalation decisions are then handled manually.</p>	<p>Lifecycle signals are monitored by the Exception Detection Analyst Agent* (Custom Agent), which recommends rerouting or escalation paths. Supervisors review and approve corrective actions.</p>	<p>Routing performance is continuously optimized by an Autonomous Optimization Agent* (Custom Agent) using outcome feedback and learning loops. Structural or policy conflicts are escalated to the Customer Service Representative.</p>
<p>Cumulative Success Metrics <small>(measured at workflow or overall process level; former useful for tracking but latter a better indicator of actual process improvement)</small></p>	<p>Usage</p> <ul style="list-style-type: none"> • Reduction in time: Case summarization & triage • Improved accuracy: Manual routing decisions • Faster identification of SLA risk cases 	<p>KPIs Impacted</p> <ul style="list-style-type: none"> • Routing accuracy: Across skills and capacity • Reduction in misroutes and handoffs • SLA risk identification lead time • Supervisor approval turnaround time 	<p>Workflow Automated</p> <ul style="list-style-type: none"> • % of cases routed & prioritized autonomously • Reduction in SLA breaches through proactive intervention • Improvement in queue balance & agent utilization • Reduction in customer wait times • Exception rate requiring human override

Automated Issue Diagnosis & Root-Cause Analysis

*Custom built agents

	PATTERN 1	PATTERN 2	PATTERN 3
	Human uses Copilot	Human uses agent, reviews, and approves output	Humans set direction and agents run entire workflows
Data & Context Gathering	Historical context is gathered manually by the Customer Service Representative , who uses Copilot Chat to summarize prior tickets, retrieve device or product history, and surface relevant case details. The Customer Service Representative drives each step of the intake.	Customer history, multi-channel interactions, telemetry, entitlement data, and recent changes are aggregated automatically by the Context Aggregation Agent* (Custom Agent). The Customer Service Representative reviews the consolidated context before diagnosis begins.	Real-time usage data, logs, and historical signals are continuously collected by a Context Engine working with a Telemetry Ingestion Agent* (Custom Agent). Customer Service Representative intervention occurs only when data conflicts are detected.
Symptom Extraction & Problem Classification	Symptoms are extracted by the Customer Service Representative from notes, messages, and attachments using Copilot Chat . Basic issue categories are suggested to support manual classification.	Symptoms are identified and correlated with known patterns by the Classification Analyst Agent* (Custom Agent), which proposes detailed multi-level classifications. The Customer Service Representative validates the output.	Symptoms are classified automatically by an Autonomous Classification Agent* (Custom Agent) using NLP and telemetry correlation. Ambiguous cases are flagged for review by a Customer Service Representative .
Diagnostic Reasoning & Hypothesis Generation	The Customer Service Representative explores likely causes by asking Copilot Chat for potential root causes based on knowledge base content and similar resolved cases. The Customer Service Representative decides which hypothesis to pursue.	Diagnostic hypotheses are generated by the Diagnostic Reasoning Agent* (Custom Agent), which correlates symptoms with historical fixes and resolution paths. The Customer Service Representative selects which hypothesis to pursue.	Diagnostic hypotheses are generated, tested, and validated by an Autonomous Diagnostic Engine working with a Historical Resolution Model Agent* (Custom Agent). Escalation occurs only when a likely root cause cannot be determined.
Recommended Troubleshooting Steps	Recommended troubleshooting steps are requested via Copilot Chat , which retrieves relevant knowledge base articles and guides standard diagnostic workflows. Execution by the Customer Service Representative remains manual.	Personalized troubleshooting flows are generated by the Guided Troubleshooting Agent* (Custom Agent) based on severity, product context, and historical effectiveness. The Customer Service Representative executes the guided steps.	Diagnostics and checks are executed automatically by an Autonomous Resolution Planner Agent* (Custom Agent) in collaboration with a Remote Diagnostics Agent (Custom Agent). The Customer Service Representative's action is required only for steps that cannot be automated.
Root-Cause Validation & Knowledge Capture	Root cause is confirmed manually by the Customer Service Representative and documented in the case record. Copilot Chat drafts resolution summaries and updates case notes.	Root-cause alignment is verified by the Analyst Agent , which also recommends knowledge base updates and flags recurring issues. Items requiring deeper review are routed to subject-matter experts.	Root causes are validated automatically by an Autonomous Knowledge Loop Agent* (Custom Agent) working with a Learning Feedback Agent* (Custom Agent). Knowledge models and repositories are updated continuously, with systemic issues flagged for proactive remediation.
Cumulative Success Metrics <small>(measured at workflow or overall process level; former useful for tracking but latter a better indicator of actual process improvement)</small>	Usage <ul style="list-style-type: none"> Reduction in time: Gathering case context Accuracy of symptom extraction & categorisation First-contact resolution improvement 	KPIs Impacted <ul style="list-style-type: none"> Diagnostic accuracy: Across agent-assisted cases Time to validated root cause Reduction in repeat troubleshooting steps Knowledge base update effectiveness 	Workflow Automated <ul style="list-style-type: none"> % of issues diagnosed end-to-end autonomously Improvement in first-contact resolution Speed of systemic issue detection & remediation Exception rate requiring human intervention

AI-Augmented Resolution & Escalation Handling

*Custom built agents

	PATTERN 1	PATTERN 2	PATTERN 3
	Human uses Copilot	Human uses agent, reviews, and approves output	Humans set direction and agents run entire workflows
Solution Recommendation & Action Guidance	Recommended fixes are explored by the Customer Service Representative using Copilot Chat , which surfaces ranked suggestions based on case context, knowledge articles, and similar historical resolutions. Final judgement remains with the Customer Service Representative .	Diagnostic outputs and known fixes are analyzed by the Researcher Agent which generates prioritized recommendations with step-by-step guidance tailored to the customer environment. The Customer Service Representative reviews and approves actions.	Resolutions are executed autonomously by an Autonomous Resolution Engine working with a Policy Guard Agent* (Custom Agent) to select and apply approved fixes. Human intervention occurs only when automation is insufficient or restricted.
Workflow Execution & Step Validation	Each troubleshooting step is executed manually, with Copilot Chat providing contextual prompts, checklists, and validation criteria. Progress is tracked by the Customer Service Representative .	A dynamic troubleshooting workflow is generated by the Procedural Guidance Analyst Agent* (Custom Agent) , which validates step outcomes and flags actions requiring human input. Execution remains supervised by the Customer Service Representative .	Troubleshooting steps are performed end-to-end by an Execution Orchestrator Agent* (Custom Agent) in collaboration with a Telemetry Validation Agent (Custom Agent) . Outcomes are validated in real time and workflows adapt automatically.
Escalation Detection & Recommendation	To determine whether escalation is required, the Customer Service Representative asks Copilot Chat to assess signals such as repeated failures or unresolved high-severity symptoms. The escalation decision is made manually.	Escalation signals are monitored by the Escalation Assessment Analyst Agent* (Custom Agent) using severity, repeat contacts, SLA risk, and sentiment indicators. Recommendations to escalate are approved by supervisors.	Escalation decisions are made autonomously by an Autonomous Escalation Manager Agent* (Custom Agent) working with SLA Prediction and Sentiment Analysis Agents* (Custom Agent) . High-risk failures or breach risks are routed without manual approval.
Escalation Packaging & Context Transfer	When escalation is needed, Copilot Chat is used to summarize troubleshooting steps taken and compile relevant logs or evidence. The Customer Service Representative finalizes the escalation package.	Escalation context is automatically compiled by the Context Packaging Agent* (Custom Agent) aggregating logs, customer history, hypotheses, and outcomes into a structured handoff. The Customer Service Representative validates before transfer.	Complete escalation packages are generated automatically by an Autonomous Transfer Engine in coordination with a Knowledge Context Agent* (Custom Agent) , which compiles telemetry snapshots, sentiment trends, and predicted next steps. Packages are routed directly to the correct team or system.
Post-Resolution Case Closure & Knowledge Update	After resolution, the Customer Service Representative documents case closure manually. Copilot Chat drafts closure notes and suggests related knowledge base updates.	Fix application and outcomes are reviewed by the Resolution Validation Analyst Agent* (Custom Agent) which recommends knowledge updates and flags emerging patterns for subject-matter expert review.	Knowledge models are updated continuously by an Autonomous Knowledge Loop Agent* (Custom Agent) working with a Learning Feedback Agent* (Custom Agent) . Systemic issues and product defects are flagged proactively for engineering remediation
Cumulative Success Metrics <small>(measured at workflow or overall process level; former useful for tracking but latter a better indicator of actual process improvement)</small>	Usage <ul style="list-style-type: none"> Reduction in time: Preparing resolutions Consistency of troubleshooting execution Clarity and completeness of escalation documentation 	KPIs Impacted <ul style="list-style-type: none"> Resolution quality: Across agent-assisted cases Reduction in unnecessary escalations Escalation approval turnaround time Effectiveness of structured handoffs 	Workflow Automated <ul style="list-style-type: none"> % of resolutions executed autonomously Speed and accuracy of escalation decisions Reduced SLA breaches through proactive escalation Consistency of fix application across cases Exception rate requiring human intervention

Service Quality & Continuous Improvement Insights

*Custom built agents

	PATTERN 1	PATTERN 2	PATTERN 3
	Human uses Copilot	Human uses agent, reviews, and approves output	Humans set direction and agents run entire workflows
Case Data & Trend Aggregation	Recent cases, recurring issue types, backlog trends, and sentiment indicators are reviewed by the Customer Service Representative using Copilot Chat . Data is pulled on request and analyzed manually.	Case data, omnichannel interactions, CSAT, backlog metrics, and operational KPIs are aggregated by the Service Insights Analyst Agent* (Custom Agent) . Insight summaries are reviewed and approved by Customer Service Representatives .	Global support patterns, device telemetry, and customer signals are monitored continuously by a Service Insight Engine working with a Telemetry Monitoring Agent* (Custom Agent) . Real-time dashboards are produced without prompts.
Root-Cause Pattern Detection	The Customer Service Representative explores common themes across resolved using Copilot Chat to surface frequent symptom clusters or repeated failure patterns. Interpretation and validation are carried out by the Customer Service Representative .	Root-cause patterns are identified by the Pattern Detection Analyst Agent* (Custom Agent) , which correlates data across time, geography, product versions, and customer segments. Leaders validate findings.	Root-cause issues are detected early by a Pattern Intelligence Agent* (Custom Agent) collaborating with a Conversational Analytics Agent* (Custom Agent) . Anomalies and predictive risks are flagged automatically.
Process & Policy Gap Identification	Workflow inefficiencies such as long resolution times or repeated escalations are highlighted using Copilot Chat when prompted. Root-cause analysis and prioritization are handled manually by the Customer Service Representative .	Queues, handoffs, repeat contacts, and escalation paths are analyzed by the Process Intelligence Analyst Agent* (Custom Agent) , which recommends targeted process or policy improvements. Recommendations are reviewed by the Customer Service Representative before action.	Operational bottlenecks and breakdown risks are identified proactively by a Process Optimization Agent* (Custom Agent) , which predicts issues and triggers remediation workflows.
Automation & Knowledge Improvement Recommendations	The Customer Service Representative asks Copilot Chat to suggest knowledge base articles or automation opportunities based on recent case summaries. Decisions about updates or automation remain manual.	Knowledge gaps and automation opportunities are identified by the Knowledge Optimization Agent* (Custom Agent) based on resolution and deflection patterns. Content and automation candidates are approved by the Customer Service Representative before deployment.	Knowledge content and micro-automations are updated automatically by a Knowledge Evolution Engine working with a Model Retraining Agent* (Custom Agent) . Human review occurs only for high-risk changes.
Performance Insight Reporting & Action Planning	Service performance summaries are drafted using Copilot Chat and reviewed by managers. Improvement actions are then proposed and planned by relevant teams.	Recurring quality reports and improvement recommendations are generated by the Performance Insights Analyst Agent* (Custom Agent) , highlighting priority intervention areas. Actions such as training or rule updates are approved by leadership.	End-to-end improvement cycles are orchestrated by the Operations & Quality Agent* (Custom Agent) , prioritizing issues, executing corrective actions, and notifying leaders only for strategic approval.
Cumulative Success Metrics <small>(measured at workflow or overall process level; former useful for tracking but latter a better indicator of actual process improvement)</small>	Usage <ul style="list-style-type: none"> • Faster access to service trends and summaries • Reduction in manual data compilation effort • Improved visibility into recurring issues 	KPIs Impacted <ul style="list-style-type: none"> • Insight generation efficiency • Accuracy: Root-cause identification • Reduction in repeat issues through targeted updates • Operational optimization impact 	Workflow Automated <ul style="list-style-type: none"> • Near-real-time insight delivery • Quality improvement driven by autonomous detection • Proactive identification of emerging issues • Reduction in operational bottlenecks • Exception rate requiring human review

AI Self-Service Assistant & Guided Troubleshooting

*Custom built agents








	PATTERN 1	PATTERN 2	PATTERN 3
	Human uses Copilot	Human uses agent, reviews, and approves output	Humans set direction and agents run entire workflows
User Inquiry Understanding & Intent Detection	Customer questions are reviewed by the Customer Service Representative , who uses Copilot Chat to summarize inquiries and identify user intent from chat or email interactions.	User intent is detected by the Self-Service Intent Analyst Agent* (Custom Agent) across self-service channels such as chat, web, or IVR. Proposed troubleshooting paths are reviewed and approved before execution.	User intent is detected in real time by the Intent Engine , working with a Conversational Understanding Agent* (Custom Agent) to route issues directly into fully automated troubleshooting flows without human involvement.
Content Retrieval & Solution Recommendation	Relevant knowledge base articles and troubleshooting steps are retrieved by prompting Copilot Chat . The Customer Service Representative selects which guidance to share.	Best-fit self-service solutions are surfaced by the Researcher Agent , using historical resolution success, contextual signals, and entitlements. The Customer Service Representative validates recommendations.	Solutions are dynamically selected by the Resolution Suggestion Engine , collaborating with a User Context Agent* (Custom Agent) to optimize recommendations based on device data, configuration, and behavior patterns.
Guided Troubleshooting Flow Execution	The Customer Service Representative walks through troubleshooting steps manually with the customer, with Copilot Chat providing on-demand instructions and contextual prompts during the interaction.	Interactive, step-by-step troubleshooting flows are delivered by the Guided Troubleshooting Analyst Agent* (Custom Agent) within self-service channels. User input is validated before progression.	End-to-end troubleshooting is coordinated by the Troubleshooting Orchestrator Agent* (Custom Agent), working with a Diagnostics Execution Agent to validate responses, adapt paths in real time, and perform automated actions where permitted.
Escalation to Human Support	If escalation is required, Copilot Chat is used to draft escalation notes and summarize steps already attempted. The case is then handed off to the Customer Service Representative to review and action.	Self-service failure is detected by the Escalation Triage Analyst Agent* (Custom Agent), which gathers diagnostic context and routes the case to the appropriate Customer Service Representative or queue for resolution.	Escalations are handled automatically by the Escalation Manager Agent* (Custom Agent), working with an SLA Risk Agent* (Custom Agent) to predict failures, preserve context, and route cases to the best agent or queue only when required.
Self-Service Feedback Loop & Content Optimization	User feedback is reviewed manually by the Customer Service Representative , with Copilot Chat summarizing common failure points or outdated instructions for later review.	Failure and abandonment patterns are analyzed by the Content Optimization Analyst Agent* (Custom Agent), which recommends content updates and improved guidance paths for approval.	Self-service content and flows are continuously improved by the Knowledge Evolution Engine , working with a Learning Feedback Agent* (Custom Agent) to retrain models, update instructions, and deploy micro-improvements based on outcomes.
Cumulative Success Metrics <small>(measured at workflow or overall process level; former useful for tracking but latter a better indicator of actual process improvement)</small>	Usage <ul style="list-style-type: none"> Improvement in issue containment through assisted guidance User experience clarity during self-service interactions Incremental operational efficiency from guided steps 	KPIs Impacted <ul style="list-style-type: none"> Increase in containment rate through guided troubleshooting Consistency & personalization of self-service journeys Reduction in agent workload from validated self-service flows 	Workflow Automated <ul style="list-style-type: none"> % of issues resolved autonomously end-to-end Real-time adaptive self-service execution accuracy Reduction in escalation frequency and handling time Operational efficiency gains from automated diagnostics Exception rate requiring human intervention

Legal Function



Top Scenarios for Legal Transformation

As you mature in your Frontier Firm journey...work evolves from human-led Copilot assistance, to agent-supported decisions, and ultimately to agent-executed workflows with humans providing oversight, judgment, and exception handling.

Scenarios	Key processes	Products	Success Metrics
Regulatory Intelligence & Compliance Monitoring	Scan regulatory sources, flag changes & map to internal policies & controls; reduce manual tracking effort & lower compliance risk.	 Copilot Chat	<ul style="list-style-type: none"> ✓ Faster execution across core legal work
Contract Drafting, Review & Negotiation	Create first-drafts, detect risky clauses & recommend alternative based on playbooks & past negotiated terms. Accelerate cycle time & reduce legal workload.	 M365 Copilot	<ul style="list-style-type: none"> ✓ Higher quality and consistency of legal outputs
Risk Detection & Mitigation Intelligence	Analyze contracts, policies & operational data to surface emerging legal & commercial risks. Enable proactive mitigation.	 Dynamics 365 Sales	<ul style="list-style-type: none"> ✓ Increased volume of legal requests handled
Legal Advisory for Business Teams	Answer routine queries, summarise relevant policies & drafts guidance notes; free legal teams for complex, high-value work.	 Analyst Agent	<ul style="list-style-type: none"> ✓ Reduced legal and compliance risk exposure
Strategic Legal Insight & Governance Advisor	Synthesise regulatory updates, contract data & risk signals into executive briefings. Support board-level decisions & strengthen governance.	 Researcher Agent  People Agent  Copilot Studio Agents	<ul style="list-style-type: none"> ✓ Clearer visibility into regulatory and risk posture ✓ Broader automation across legal workflows

Click [here](#) for additional details on scenarios, product information, and success metrics.

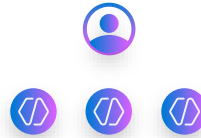
Regulatory scanning

Pattern 1



New regulations are reviewed by the **Compliance Analyst** or **Legal Associate**, using **Copilot Chat** to summarize regulatory updates from external sources. Searches and follow-up summaries are initiated manually.

Pattern 2



Regulatory alerts and summaries are generated by the **Researcher Agent** and reviewed by the **Regulatory Specialist** or **Compliance Officer** for accuracy and relevance before distribution.

Pattern 3



Regulatory changes are monitored continuously by a **Regulatory Scanning Agent (Custom Agent)**, with dashboards reviewed by the **Compliance Manager** or **Legal Operations Lead**. Human intervention occurs only for high-risk changes.

Regulatory Intelligence & Compliance Monitoring

*Custom built agents

	PATTERN 1	PATTERN 2	PATTERN 3
	Human uses Copilot	Human uses agent, reviews, and approves output	Humans set direction and agents run entire workflows
Regulatory Scanning	New regulations are reviewed manually by the Compliance Analyst or Legal Associate , using Copilot Chat to summarize regulatory updates from external sources. Searches and follow-up summaries are initiated manually.	Regulatory alerts and summaries are generated by the Researcher Agent and reviewed by the Regulatory Specialist or Compliance Officer for accuracy and relevance before distribution.	Regulatory changes are monitored continuously by a Regulatory Scanning Agent* (Custom Agent), with dashboards reviewed by the Compliance Manager or Legal Operations Lead . Human intervention occurs only for high-risk changes.
Compliance Mapping	Compliance checklists are drafted by Legal Counsel or a Policy Analyst , with Copilot Chat used to summarize regulations and support manual mapping to internal policies in Word.	Regulations are mapped to internal controls by a Compliance Mapping Agent* (Custom Agent) with validation and approval performed by the Compliance Officer or Legal Operations Specialist .	Compliance mappings are updated automatically by a Compliance Mapping Agent* (Custom Agent). The Head of Compliance or Governance Lead intervenes only for strategic or exception cases.
Risk Flagging	Risk assessment templates and gap summaries are created by Legal Counsel or a Risk Analyst using Copilot Chat . Risk interpretation and prioritization remain human-led.	Risk scores and mitigation suggestions are generated by a Risk Detection Agent* (Custom Agent). The Risk Manager or Compliance Analyst reviews outputs and approves recommended actions.	High-severity risks are escalated automatically by a Risk Flagging Agent* (Custom Agent), with review by the Chief Risk Officer or Senior Legal Counsel as needed.
Policy Update	Policy updates are drafted by Legal Counsel or a Policy Writer using Copilot Chat to summarize regulatory changes. Edits and publication are handled manually.	Draft policy revisions are proposed by the Researcher Agent based on regulatory changes. The Compliance Officer or Policy Manager approves and finalizes updates.	Policy changes are executed autonomously by a Policy Update Agent* (Custom Agent), maintaining version control and audit trails. The Compliance Director or Governance Lead intervenes only for sensitive updates.
Audit Preparation	Audit evidence and checklists are compiled manually by the Legal Operations Specialist or Audit Coordinator , with Copilot Chat assisting with summarization and organization.	Audit-ready documentation is prepared by an Audit Prep Agent* (Custom Agent). The Audit Manager or Compliance Specialist reviews and approves materials before submission.	Audit preparation workflows are executed end-to-end by an Audit Preparation Agent* (Custom Agent). Exceptions related to regulatory interpretation or compliance gaps are escalated for review.
Cumulative Success Metrics <small>(measured at workflow or overall process level; former useful for tracking but latter a better indicator of actual process improvement)</small>	Usage <ul style="list-style-type: none"> AI adoption across regulatory review workflows Reduction in time: Regulatory summarization Quality and clarity of compliance documentation Volume of risks identified Policy update turnaround time 	KPIs Impacted <ul style="list-style-type: none"> Speed of regulatory change detection Accuracy of regulation-to-policy mapping Approval cycle time for agent recommendations Reduction in missed regulatory updates Utilization rate of agent-generated recommendations 	Workflow Automated <ul style="list-style-type: none"> % of compliance workflows executed autonomously Reduction in exception escalation volume Accuracy of automated compliance updates Audit readiness coverage End-to-end compliance cycle time reduction

AI-Assisted Contract Drafting, Review, and Negotiation

*Custom built agents

	PATTERN 1	PATTERN 2	PATTERN 3
	Human uses Copilot	Human uses agent, reviews, and approves output	Humans set direction and agents run entire workflows
Initial Draft Creation	Initial contract drafts are created by the Attorney using Copilot in Word , leveraging templates and prior contracts. Language refinement and legal judgment remain fully manual.	Draft clauses are generated by the Researcher Agent , drawing from clause libraries, prior agreements, and external references. The Attorney reviews and approves edits.	Full contract drafts are generated autonomously by the Drafting Agent* (Custom Agent) using templates, clause libraries, and contextual data. Escalation occurs only for missing, unusual, or high-risk terms.
Clause Review & Compliance Check	Clause reviews are performed by the Attorney , with Copilot Chat used to summarize clauses, highlight deviations, and suggest alternatives. Compliance checks are conducted manually.	Clause-level risk scoring and compliance analysis are performed by the Compliance Analysis Agent* (Custom Agent) which flags deviations and recommends compliant alternatives. The Attorney approves changes.	Clause compliance and policy enforcement are handled by the Compliance Agent* (Custom Agent) which auto-corrects non-compliant language and escalates only high-risk anomalies.
Risk Flagging & Insights	Risk summaries and key clause highlights are generated by Copilot Chat at the request of the Attorney , who interprets risk and determines mitigation actions.	Risk scoring and impact analysis are generated by the Analyst Agent , with Copilot Chat assisting in producing mitigation summaries. The Attorney validates conclusions.	Risk evaluation and mitigation updates are performed autonomously by the Risk Management Agent* (Custom Agent), which applies thresholds and updates contract records automatically.
Negotiation Support	Negotiation preparation is supported by Copilot in Teams , where the Attorney drafts talking points and summarizes counterparty proposals.	Counterparty proposals are analyzed by the Negotiation Support Agent* (Custom Agent) which recommends counteroffers and drafts responses. The Attorney approves negotiation positions.	Negotiation sequencing, counteroffers, and concession tracking are managed by the Negotiation Orchestrator Agent* (Custom Agent), escalating only stalled negotiations or deadlock scenarios.
Finalization & Execution	Final contract summaries and signature-ready documents are prepared by the Attorney using Copilot Chat , with routing and execution handled manually.	Signature workflows are automated by the Workflow Agent* (Custom Agent) validating final compliance and alerting the Attorney for approval prior to execution.	Execution, signature routing, archival, and downstream system updates are handled end-to-end by the Contract Lifecycle Agent* (Custom Agent), with human intervention only for exceptions.
Cumulative Success Metrics <small>(measured at workflow or overall process level; former useful for tracking but latter a better indicator of actual process improvement)</small>	Usage <ul style="list-style-type: none"> Average contract drafting time Number of manual review iterations Clause suggestion adoption rate Contract completion cycle time 	KPIs Impacted <ul style="list-style-type: none"> Compliance accuracy rate High-risk clause detection coverage Attorney approval turnaround time Reduction in negotiation rework 	Workflow Automated <ul style="list-style-type: none"> Contract turnaround SLA compliance Exception escalation rate Cost per contract processed End-to-end contract automation rate

Legal Risk Detection & Mitigation Intelligence

*Custom built agents

	PATTERN 1	PATTERN 2	PATTERN 3
	Human uses Copilot	Human uses agent, reviews, and approves output	Humans set direction and agents run entire workflows
Contract Risk Scanning	The Legal Counsel uses Copilot in Word to summarize clauses, highlight potentially high-risk language, and draft a first-pass risk summary. Judgment and interpretation is carried out by the Legal Counsel .	The Legal Counsel directs the Researcher Agent to scan new contracts for high-risk clauses. Identified risks and summaries are reviewed and validated by the Legal Counsel .	The Legal Risk Agent* (Custom Agent) autonomously scans all new contracts, applies risk scoring, and escalates only threshold-exceeding issues to the Legal Counsel .
Risk Scoring & Prioritization	The Compliance Manager uses Copilot Chat and Copilot in Excel to compile identified risks into a simple scoring matrix and manually prioritize them.	The Compliance Manager works with the Analyst Agent to evaluate multi-source inputs (risk logs, contract data, historical outcomes). Risk scores are generated and adjusted by the Compliance Manager before final prioritization.	The Risk Intelligence Agent* (Custom Agent) continuously updates enterprise risk scores using contract data, regulatory signals, and historical outcomes. The Compliance Manager intervenes only for policy exceptions.
Mitigation Planning	The Risk Officer drafts mitigation actions using Copilot in Word , referencing internal policy templates and leveraging Copilot Chat for best-practice guidance. The officer defines timelines and ownership manually.	The Risk Officer collaborates with the People Agent to propose mitigation actions aligned to skills, expertise, and capacity. Copilot Chat is used to refine timelines and execution plans before approval.	The Mitigation Agent* (Custom Agent) executes predefined mitigation actions, including stakeholder notifications and compliance tracker updates, escalating only unresolved or high-impact risks.
Continuous Risk Monitoring	The Legal Analyst reviews risk dashboards in Power BI and uses Copilot Chat to summarize recent risk alerts and regulatory updates, responding on an ad hoc basis.	The Legal Analyst uploads signals from contracts, litigation alerts, and regulatory feeds. The Analyst Agent identifies emerging risk patterns and flags anomalies for review.	The Monitoring Agent* (Custom Agent) tracks risk signals across systems, updates dashboards, and applies machine-learning-based anomaly detection. Exceptions are routed to the Legal Analyst .
Regulatory Change Impact Analysis	The Compliance Manager manually reviews new regulations and uses Copilot in Word to summarize implications and draft impact notes for leadership and internal stakeholders.	The Compliance Manager asks the Researcher Agent to analyze regulatory changes, map impacted clauses, and draft compliance updates. Final guidance is reviewed and approved before distribution.	The Regulatory Update Agent* (Custom Agent) ingests regulatory feeds, updates compliance frameworks and risk models, triggers policy revisions, and escalates only high-impact regulatory changes for human review.
Cumulative Success Metrics <small>(measured at workflow or overall process level; former useful for tracking but latter a better indicator of actual process improvement)</small>	Usage <ul style="list-style-type: none"> • Risk assessment turnaround time • Manual review effort • Number of risks identified • Regulatory impact response time 	KPIs Impacted <ul style="list-style-type: none"> • Reduction in compliance incidents • Risk scoring accuracy • Mitigation planning cycle time • % of workflows partially automated 	Workflow Automated <ul style="list-style-type: none"> • Reduction in compliance violations year over year • Risk mitigation cycle time reduction • Exception escalation rate • Increase in end-to-end risk automation

Legal Advisory for Business Teams

*Custom built agents

	PATTERN 1	PATTERN 2	PATTERN 3
	Human uses Copilot	Human uses agent, reviews, and approves output	Humans set direction and agents run entire workflows
Initial Draft Creation	The Legal Counsel uses Copilot in Word and Teams to draft advisory notes based on uploaded policy documents. Next, they use Copilot Chat to provide basic summarization and FAQ-style responses. They then interpret and refine manually.	The Legal Counsel uses the Researcher Agent to surface relevant case law, internal policies, and prior advisories. The agent drafts a structured advisory note, which the Legal Counsel reviews and edits.	The Legal Advisory Agent* (Custom Agent) autonomously generates full advisory drafts from integrated knowledge bases, including SharePoint, compliance databases, and internal precedents. Drafts are escalated only when confidence thresholds or ambiguity rules are triggered.
Clause Review & Risk Flagging	The Lawyer asks Copilot Chat to summarize clauses and highlight key terms from uploaded contracts. They then handle risk interpretation and escalation decisions manually.	The Contract Manager works with the Analyst Agent and a Risk Agent* (Custom Agent) to proactively scan clauses, flag high-risk language, and suggest alternative wording. Recommendations are approved by the Legal Counsel .	The Risk Agent* (Custom Agent) continuously monitors incoming contracts, flags risks, applies standard mitigation language, and escalates only non-standard clauses to Senior Counsel .
Policy & Regulatory Alignment Check	When business users ask ad-hoc questions such as "Does this clause comply with GDPR?", Copilot Chat responds using internal policy documentation. The Legal Counsel validates accuracy before guidance is shared.	The Compliance Officer asks the Researcher Agent to cross-reference contract clauses with regulatory databases and internal policies. Gaps are surfaced for legal review before guidance is issued.	The Compliance Agent* (Custom Agent) validates clauses against regulatory frameworks and internal policies, updates compliance dashboards, and alerts legal only when exceptions occur.
Negotiation Support	The Legal Negotiator uses Copilot Chat to draft talking points for negotiation based on prior agreements stored in SharePoint. Final positioning is determined manually by the Legal Negotiator .	The Legal Negotiator uses the People Agent and a Negotiation Agent* (Custom Agent) to recommend negotiation strategies, highlight fallback positions, and prepare annotated drafts. The Legal Counsel approves final guidance.	The Negotiation Agent* (Custom Agent) handles routine vendor negotiations using approved templates, executes agreed changes, and escalates complex or disputed terms to the Legal Counsel .
Finalization & Record Management	Copilot Chat is used to assist with formatting final advisory notes and storing them in SharePoint. Version control and record governance are then managed by the Legal Team .	A Document Management Agent* (Custom Agent) automates document routing for approvals, applies sensitivity labels, and archives advisory notes in the compliance repository. The Legal Counsel signs off before release.	The Document Management Agent* (Custom Agent) finalizes advisory notes, applies compliance tags, updates FAQs automatically, and logs advisory intelligence in the legal knowledge base. Exceptions are escalated only when policy or risk thresholds are exceeded.

Cumulative

Success Metrics

(measured at workflow or overall process level; former useful for tracking but latter a better indicator of actual process improvement)

Usage

- Advisory turnaround time
- Number of drafts generated via Copilot
- Manual review effort
- Volume of ad-hoc legal queries handled

KPIs Impacted

- Compliance gap detection rate
- Legal team productivity index
- Approval cycle time
- % of advisory workflows partially automated

Workflow Automated

- Advisory automation rate
- Exception escalation ratio
- Consistency of legal guidance
- Reduction in legal response time for business teams

Strategic Legal Insight & Governance Advisor

*Custom built agents











	PATTERN 1	PATTERN 2	PATTERN 3
	Human uses Copilot	Human uses agent, reviews, and approves output	Humans set direction and agents run entire workflows
Regulatory Trend Analysis	The Legal Analyst uses Copilot in Word to summarize recent regulatory updates from uploaded documents and external sources. They manually curate and apply interpretation before sharing.	The Legal Analyst instructs the Researcher Agent to scan global regulatory feeds and draft a trend analysis highlighting emerging risks and policy changes. The analyst reviews and approves the final report.	The Regulatory Intelligence Agent* (Custom Agent) continuously monitors legal databases, flags emerging regulatory trends, updates dashboards, and alerts the Legal Analyst only when high-impact changes are detected.
Executive Briefing Preparation	The Legal Counsel creates slides summarizing compliance risks and governance priorities. Copilot in PowerPoint assists with slide layout and key talking points, while final messaging is crafted manually.	The Legal Counsel uses the Researcher Agent to compile insights from compliance reports and regulatory updates. The agent drafts an executive outline, which the Legal Counsel edits and finalizes.	The Briefing Agent* (Custom Agent) compiles and formats executive-ready decks on a scheduled basis and routes them to the Legal Counsel for final approval before distribution.
Governance Risk Assessment	The Compliance Officer asks Copilot Chat to summarize audit findings and surface potential risk themes. Validation and prioritization are handled manually before drafting leadership updates.	The Compliance Officer asks the Analyst Agent to correlate governance risks with workforce and operational trends and produce a risk heatmap. Thresholds and mitigation priorities are validated before publication.	The Governance Agent* (Custom Agent) runs continuous risk scoring, triggers alerts when thresholds are breached, and automatically recommends mitigation actions. Weekly summaries are shared with the Compliance Officer .
Board Reporting	The Corporate Secretary consolidates compliance data from multiple sources into a single workbook and uses Copilot in Excel to build pivot tables and visual charts for board materials.	The Corporate Secretary uses the Researcher Agent to reference prior filings, draft the board report narrative, anticipate likely questions, and generate talking points linked to internal documentation.	The Board Reporting Agent* (Custom Agent) autonomously produces quarterly compliance reports, distributes them via board portals, and escalates only unresolved or high-risk issues.
Compliance Strategy Alignment	The Compliance Officer outlines a compliance roadmap and uses Copilot Chat to draft a first-pass strategy aligned to regulatory frameworks and internal policies.	The Compliance Officer prompts the People Agent to analyze employee roles in audit-sensitive functions and propose a targeted compliance training and remediation plan. Recommendations are reviewed and approved.	The Compliance Agent* (Custom Agent) updates compliance strategies and training plans based on regulatory changes and audit feedback, escalating only critical policy shifts for human review.
Cumulative Success Metrics <small>(measured at workflow or overall process level; former useful for tracking but latter a better indicator of actual process improvement)</small>	Usage <ul style="list-style-type: none"> Reduction in time: Drafting & information retrieval Adoption of AI across legal and governance tasks Lower manual effort required for insight synthesis 	KPIs Impacted <ul style="list-style-type: none"> Regulatory compliance score Approval cycle time Accuracy of governance risk assessments 	Workflow Automated <ul style="list-style-type: none"> Increase in end-to-end governance automation Escalation accuracy rate Timeliness of regulatory response

HR Function



Top Scenarios for HR Transformation

As you mature in your Frontier Firm journey...work evolves from human-led Copilot assistance, to agent-supported decisions, and ultimately to agent-executed workflows with humans providing oversight, judgment, and exception handling.

Scenarios	Key processes	Products	Success Metrics
Employee Onboarding & Exit	Analyze survey responses, chat data & behavioural signals to surface drivers of satisfaction, burnout & turnover. Improve new-hire readiness, reduce compliance & access risk during departures.	<ul style="list-style-type: none">  Copilot Chat  M365 Copilot  Dynamics 365 Sales  Analyst Agent  Researcher Agent  Writing Coach Agent  People Agent  Workforce Insights Agent  Facilitator Agent  Learning Agent  Skills Landscape Report  Copilot Studio Agents 	<ul style="list-style-type: none"> ✓ Faster execution across core HR work ✓ Higher quality, more consistent HR outputs ✓ Increased volume of employee interactions handled ✓ Improved employee and talent outcomes ✓ Clearer visibility into workforce trends and risks ✓ Broader automation across HR workflows
Talent Sourcing & Candidate Screening	Match candidates to roles using skills, experience & fit signals; reduce time-to-shortlist & help recruiters focus on high-quality applicants instead of manual CV filtering.		
Adaptive Learning Paths & Skills Development	Build personalised training journeys based on role, skill gaps & career goals; increase completion rates & reduce time spent on irrelevant learning modules.		
Talent Pipeline & Succession	Flag rising talent, predict attrition risk & recommend succession plans based on performance, skills & mobility data. Strengthen leadership continuity & workforce planning.		
Strategic Workforce Planning & Scenarios Modeling	Model future talent needs, hiring gaps, & cost impacts under different business scenarios. Enable proactive workforce decisions instead of reactive headcount adjustments.		

Click [here](#) for additional details on scenarios, product information, and success metrics.

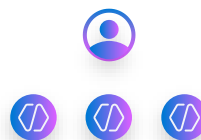
Learning Effectiveness Analytics

Pattern 1



Post-training survey, completion, and performance data are exported by the **L&D Specialist** and analyzed in **Copilot in Excel**. Trends are interpreted manually to assess learning effectiveness.

Pattern 2



Multi-source learning outcomes data is analyzed by the **Analyst Agent** to generate evidence-based insights. The **L&D Specialist** reviews findings and refines recommendations before

Pattern 3



Learning impact dashboards are generated automatically by a **Learning Impact Analytics Agent*** (**Custom Agent**) correlating outcomes with business KPIs. Optimization cycles are triggered without manual input.

Employee Onboarding & Exit

*Custom built agents

	PATTERN 1	PATTERN 2	PATTERN 3
	Human uses Copilot	Human uses agent, reviews, and approves output	Humans set direction and agents run entire workflows
Sentiment Analysis from Onboarding	Survey data from onboarding is compiled manually by the HR Business Partner in Copilot in Excel to summarise key themes. They use Copilot in Word to draft a report with suggested actions and share with relevant teams after reviewing.	Survey results and conversational data are ingested by the Researcher Agent and Analyst Agent to apply sentiment and topic modelling. A prioritized list of themes and suggested drivers is reviewed by the HR Business Partner .	Employee sentiment streams are monitored continuously by the Sentiment Agent* (Custom Agent), which detects trend shifts and triggers alerts. High-risk cohorts are escalated to the HR Business Partner for intervention.
Engagement Survey Synthèses & Recommendations	Executive summaries of engagement survey results are drafted by the HR Business Partner using Copilot in PowerPoint , with visualizations created in Copilot in Power BI to highlight priority themes and recommended actions. Recommendations are manually reviewed before sharing with relevant teams.	The HR Business Partner compiles engagement metrics and applies trend analysis using the Analyst Agent . Next, executive summaries are drafted using the Writing Coach Agent and approved by the HR Business Partner before sharing with relevant teams.	Retention interventions are scheduled and tracked automatically by the Retention Agent* (Custom Agent), with outcomes re-measured over time. Low-impact actions are escalated to the HR Business Partner for redesign.
Exit Risk Detection & Early Intervention	Early warning signals such as engagement drops, manager changes, or performance variance are summarized using Copilot in Excel . Draft retention outreach templates are prepared for review using Copilot in Word .	High-risk employee signals are identified collaboratively by the People Agent and Career Coach Agent* (Custom Agent). Recommended retention plans are reviewed and approved by the HR Business Partner .	Retention workflows are initiated automatically by a Retention Agent* (Custom Agent) for high-risk employees, including check-ins and follow-ups. Persistent or unresolved risk is escalated to the HR Business Partner .
Employee Voice & Idea Mining	Open-ended employee feedback is synthesised by the Employee Experience Specialist using Copilot in Excel to generate a prioritized list of ideas with rationale. Outputs are reviewed manually by the Employee Experience Specialist before sharing with relevant teams.	Ideas are clustered and ranked by impact using the Idea Coach Agent (Custom Agent) and Researcher Agent . Recommendations are approved by the Employee Experience Manager and shared with the Innovation Committee .	Employee ideas are routed automatically by the Employee Voice Agent* (Custom Agent) to process owners, with pilots launched and ROI tracked. Stalled initiatives are escalated to HR Operations or People Analytics leadership .
Attrition & Risk Prediction (Engagement-driven)	Risk signals linked to engagement are summarized by the Employee Experience Specialist using Copilot in Excel or Word to support attrition assessment. Review is carried out by the Employee Experience Specialist before sharing with the People Analytics Manager .	Predictive attrition models are built by the Analyst Agent and People Agents , highlighting risk drivers and mitigation options. Outputs are reviewed by People Analytics Manager to action.	Engagement-driven attrition risk actions are triggered automatically by the Retention Agent* (Custom Agent), with outcomes monitored continuously. On-responders or repeated risk patterns are escalated to the relevant team.
Cumulative Success Metrics <small>(measured at workflow or overall process level; former useful for tracking but latter a better indicator of actual process improvement)</small>	Usage <ul style="list-style-type: none"> Reduction in time: Survey synthesis & reporting Quality of sentiment summaries & recommended actions Reduction in rework of engagement analyses 	KPIs Impacted <ul style="list-style-type: none"> Recommendation acceptance rate Cycle time: From insight to action Coverage: Engagement workflows supported by agents Accuracy : Risk and sentiment detection Escalation rate requiring manual override 	Workflow Automated <ul style="list-style-type: none"> % of engagement actions executed autonomously Lead time from sentiment shift to intervention Compliance & governance adherence across actions Exception rate requiring HR escalation Engagement score lift over time

AI-Augmented Talent Sourcing and Screening

*Custom built agents

	PATTERN 1	PATTERN 2	PATTERN 3
	Human uses Copilot	Human uses agent, reviews, and approves output	Humans set direction and agents run entire workflows
Candidate Sourcing	Job descriptions and outreach messages are drafted and reviewed by the Recruiter using Copilot in Word . Candidate profiles are summarized for quick review, and postings are managed manually across job boards and LinkedIn.	Candidate lists are compiled by the Researcher Agent from external sources, while the People Agent identifies internal talent pools. Outreach templates generated by the Writing Coach Agent are reviewed and approved by the Recruiter	Candidates are sourced autonomously by a Talent Sourcing Agent* (Custom Agent) across platforms, applicant tracking systems, and internal pipelines. Recruiter intervention is limited to niche roles or diversity compliance exceptions.
Resume Screening	The Recruiter uses Copilot Chat to summarize resumes and highlight experience and skills. Candidates are then ranked manually against job description criteria. The Recruiter carries out a manual review before taking action.	Resumes are parsed and structured by the Recruiter in the Analyst Agent and People Agent to extract skills and experience. Candidate profiles are validated and approved by the Recruiter before shortlisting.	Resumes are screened end-to-end by a Talent Sourcing Agent* (Custom Agent) using AI-driven scoring and tagging. Anomalies or missing credentials are flagged for review by the Recruiter .
Shortlist Creation	Shortlists and summaries are compiled by the Recruiter using Copilot Chat and shared with the Hiring Manager for approval and final decisions.	Candidates are scored by the Analyst Agent based on predefined criteria, with cultural fit insights provided by the People Agent . The Recruiter approves the shortlist recommendation.	Shortlists are finalised automatically by a Talent Sourcing Agent* (Custom Agent) , with notifications sent to the Hiring Manager and next steps triggered. Escalation to the Recruiter occurs only for strategic hires or conflicting priorities.
Recruiter Engagement	Outreach emails are drafted using Copilot in Outlook by the Recruiter to personalize messaging. Communications are checked and sent manually to candidates.	Personalised outreach drafts are prepared by a Candidate Outreach Agent* (Custom Agent) using candidate insights. Tone and compliance are reviewed by the Recruiter before sending.	Outreach is sent automatically by a Talent Sourcing Agent* (Custom Agent) , with follow-ups scheduled and engagement tracked. Recruiters intervene only for executive-level roles.
Interview Scheduling	The Recruiter drafts interview scheduling emails with Copilot in Outlook , while calendars and logistics are coordinated manually by the Recruiter.	Interview schedules are proposed by the People Agent and Facilitator Agent , resolving conflicts and logistics. The Recruiter confirms and approves the final schedule.	Interviews are scheduled automatically by a Talent Sourcing Agent* (Custom Agent) , with calendars synced and reschedules managed. Conflicts or VIP candidates are escalated to the Recruiter for review.
Cumulative Success Metrics <small>(measured at workflow or overall process level; former useful for tracking but latter a better indicator of actual process improvement)</small>	Usage <ul style="list-style-type: none"> Reduction in time: Sourcing and screening workflows Volume of candidates reviewed per recruiter Hiring manager satisfaction with shortlists Candidate experience quality 	KPIs Impacted <ul style="list-style-type: none"> Recruiter oversight efficiency % reduction in manual screening effort/ time Acceptance rate: Agent-recommended candidates 	Workflow Automated <ul style="list-style-type: none"> Frequency of exception escalations Time-to-hire across roles Cost per hire Quality of hire index End-to-end automation rate

Adaptive Learning Paths & Skills Development Assistant

*Custom built agents

	PATTERN 1	PATTERN 2	PATTERN 3
	Human uses Copilot	Human uses agent, reviews, and approves output	Humans set direction and agents run entire workflows
Skills Gap Analysis	Key skill gaps across business functions are reviewed by the HR Learning Specialist using the Skills Landscape Report powered by People Skills data. Copilot Chat is used to support summarization and synthesis to inform priorities.	Skill profiles are analyzed by the People Agent using Microsoft Graph and skills data to identify gaps and prioritised skill areas. Recommendations are reviewed by the HR Learning Specialist .	Updated skill profiles are continuously analyzed by a Skills Gap Agent* (Custom Agent) which identifies emerging gaps and triggers learning path enrolment automatically. Department-wide anomalies are escalated to the HR Learning Specialist .
Dynamic Content Recommendation	Generic learning modules are suggested using Copilot Chat based on keyword inputs. The HR Program Manager manually curates and assigns content.	Personalized learning modules are recommended by the Learning Agent* (Custom Agent) based on role, performance, and career goals. The HR Program Manager reviews and validates recommendations before rollout.	Personalized learning content is curated and delivered in real time by a Learning Agent based on learner progress, engagement, and organisational priorities. The HR Program Manager review occurs only for flagged issues.
Progress Monitoring & Predictive Completion	Learning progress and completion rates are tracked manually by the L&D Specialist using LMS reports. Copilot Chat is used to summarize insights to support intervention decisions.	Engagement telemetry, completion history, and nudges are aggregated by the Analyst Agent to predict completion risk. Suggested interventions are reviewed and approved by the L&D Specialist .	Learner progress is monitored continuously by a Predictive Completion Agent* (Custom Agent) which sends nudges or alternative content automatically. Stalled learners are escalated to the L&D Specialist .
Career Path Simulation	Potential career paths are reviewed by the Talent Advisor using Copilot Chat to synthesise documentation and job architecture. Next-role options are drafted manually for employees.	Learning paths aligned to career goals are recommended by the Learning Agent to support role progression. The Talent Advisor validates and approves recommended paths.	Career path projections are updated autonomously by a Career Path Agent* (Custom Agent) using real-time skill acquisition and experience data. Monthly summaries are delivered to HR for review.
Learning Effectiveness Analytics	Post-training survey, completion, and performance data are exported by the L&D Specialist and analyzed in Copilot in Excel . Trends are interpreted manually to assess learning effectiveness.	Multi-source learning outcomes data is analyzed by the Analyst Agent to generate evidence-based insights. The L&D Specialist reviews findings and refines recommendations before sharing.	Learning impact dashboards are generated automatically by a Learning Impact Analytics Agent* (Custom Agent) correlating outcomes with business KPIs. Optimization cycles are triggered without manual input.
Cumulative Success Metrics <small>(measured at workflow or overall process level; former useful for tracking but latter a better indicator of actual process improvement)</small>	Usage: <ul style="list-style-type: none"> Reduction in time: Learning analysis & reporting AI adoption: Across learning workflows Quality of learning insights & recommendations 	KPIs Impacted: <ul style="list-style-type: none"> Increase in skill gap closure rate Coverage: Learning workflows supported by agents Learning program ROI Accuracy: Completion & risk predictions Approval turnaround time: Learning recommendations 	Workflow Automated: <ul style="list-style-type: none"> % of learning & skills workflows executed autonomously % of internal roles filled through accelerated upskilling Reduction in manual intervention across learning programs Learning outcome alignment to business priorities Sustained increase in workforce skill readiness

Talent Pipeline & Succession Intelligence

*Custom built agents

	PATTERN 1	PATTERN 2	PATTERN 3
	<p>Human uses Copilot</p> <p>The Talent Acquisition Specialist asks Copilot in Word to draft job descriptions and asks Copilot Chat specific screening questions to expedite resume review. The Talent Acquisition Specialist then manually shortlists candidates.</p>	<p>Human uses agent, reviews, and approves output</p> <p>Candidate pools are aggregated by the Talent Acquisition Specialist and ranked by the Researcher Agent using resume data and screening criteria. Shortlist recommendations are reviewed and approved by the Talent Acquisition Specialist before progression.</p>	<p>Humans set direction and agents run entire workflows</p> <p>Candidates are sourced and screened autonomously by a Talent Sourcing Agent* (Custom Agent) with rankings and shortlists generated automatically. Only diversity, compliance, or anomaly cases are escalated to HR for review.</p>
Candidate Sourcing & Screening			
	<p>The HR Analyst manually compiles candidate data into a spreadsheet and uses Copilot in Excel to generate ranking tables based on predefined criteria.</p>	<p>The HR Analyst provides source data and asks the Analyst Agent to apply ranking algorithms, consolidate performance data, and recommend top talent lists. Consolidated talent pool insights are reviewed by the HR Analyst prior to sharing.</p>	<p>Talent pool rankings are updated continuously by a Talent Pool Agent* (Custom Agent) using real-time performance and market signals. Exceptions are escalated for HR review.</p>
Talent Pool Ranking			
	<p>Succession planning inputs are gathered manually by the HR Business Partner and summarized using Copilot Chat. Scenario modelling and final succession decisions are carried out by the HR Business Partner.</p>	<p>Successor options are generated by the People Agent based on skills, experience, and mobility constraints. Scenarios are modelled by the Analyst Agent, with HR Business Partners approving the recommended succession map.</p>	<p>Succession readiness simulations are run automatically by a Succession Agent* (Custom Agent) updating heatmaps and adjusting plans based on attrition risk. High-risk leadership gaps are escalated to HR Business Partners.</p>
Succession Planning Simulation			
	<p>The HR Analyst exports workforce data, engagement survey data, and historical attrition data and ask Copilot in Excel to highlight notable trends. Risk indicators are interpreted manually and documented in narrative summaries by the HR Analyst.</p>	<p>Attrition risk scores are generated by the Analyst Agent using engagement and workforce signals. Recommended retention actions are reviewed and approved by the HR Analyst.</p>	<p>Attrition signals are monitored continuously by a Predictive Risk Agent* (Custom Agent) which triggers retention workflows automatically. Escalation to the HR Analyst occurs only for high-risk cases.</p>
Attrition Risk Prediction			
	<p>Employee mobility data is compiled by the HR Analyst and analyzed in Copilot in Excel to identify movement patterns and outliers. Forecasting for readiness and mobility is built manually by the HR Analyst.</p>	<p>Mobility insights are generated by the Workforce Insights Agent* (Custom Agent) highlighting cross-functional movement opportunities. Curated role and upskilling paths are reviewed by the HR Analyst before sharing with relevant.</p>	<p>Mobility forecasts and internal role matches are generated by a Mobility Agent* (Custom Agent) with transitions initiated automatically. Exceptions related to compliance or cost constraints are escalated to the HR Analyst.</p>
Workforce Mobility Insights			

Cumulative Success Metrics
(measured at workflow or overall process level; former useful for tracking but latter a better indicator of actual process improvement)

- Usage**
- Reduction in time: Sourcing, ranking, & succession analysis
 - AI Adoption: Across talent planning workflows
 - Reduction in time-to-fill for critical roles

- KPIs Impacted**
- Improvement in internal mobility rate
 - Coverage: Talent planning workflows supported by agents
 - Accuracy: Succession & risk recommendations
 - Approval turnaround time for talent decisions

- Workflow Automated**
- % of pipeline and succession workflows executed autonomously
 - Improvement in leadership succession readiness
 - Reduction in attrition for critical roles
 - Accuracy of strategic workforce moves
 - Reduction in HR escalation volume

Strategic Workforce Planning & Scenario Modelling

*Custom built agents

	PATTERN 1	PATTERN 2	PATTERN 3
	Human uses Copilot	Human uses agent, reviews, and approves output	Humans set direction and agents run entire workflows
Workforce Demand Forecasting	Headcount, productivity trends, and business plans are aggregated manually by the HR Planning Manager in spreadsheets. Copilot in Excel is used to clean data, summarise trends, and draft a first-pass workforce forecast summary to be reviewed by the HR Planning Manager .	Workforce demand data from HRIS, finance, and business systems is consolidated by the HR Planning Manager and passed to the Analyst Agent to generate forecast models. Scenario outputs are reviewed, refined, and approved before finalization.	Real-time business data is ingested continuously by a Workforce Planning Agent* (Custom Agent) which updates forecasts automatically. Sudden attrition spikes or anomalies are escalated to the HR Planning Manager .
Scenario Simulation	Workforce scenarios are built manually by HR Business Partners in spreadsheets. Copilot Chat supports narrative summaries of best-and worst-case implications.	Multiple workforce scenarios are simulated by the Analyst Agent using growth and attrition assumptions. The HR Business Partner validate assumptions and approve recommended paths.	Workforce simulations are executed continuously by a Scenario Modelling Agent* (Custom Agent) adjusting plans based on live signals. Escalation to the HR Business Partner occur only for high-risk deviations.
Cost Impact Analysis	Cost implications of workforce changes are calculated by HR Business Partners using Copilot Chat to support manual modelling. Insights are summarized before formulas are applied.	Salary benchmarks and budget constraints are integrated by the Analyst Agent to model cost impacts. The HR Business Partner review outputs and approve recommendations.	Cost optimization models are recalculated automatically by a Cost Optimisation Agent* (Custom Agent) using live compensation data. Budget overruns trigger alerts for review by the HR Business Partner .
Skills Gap Identification	Skills inventory data is exported from HRIS by the Learning and Development Manager and analyzed in Copilot in Excel . Skill gaps are summarized against role expectations in narrative form and reviewed by the Learning and Development Manager before sharing.	Future role requirements are shared with the People Agent to perform skill gap analysis. The Learning Agent recommends training actions, which are reviewed and approved by the L&D Manager .	Evolving role profiles are monitored by a Skills Intelligence Agent* (Custom Agent) which updates gap dashboards and assigns learning paths automatically. Escalation to the L&D Manager occurs only for organization-wide risks.
Hiring Plan Optimization	Hiring volumes are estimated manually by the HR Business Partner with Copilot in Excel used to calculate cost impacts. Draft hiring plan summaries are generated using Copilot Chat and reviewed by the HR Business Partner .	Optimized hiring plans are generated by the Analyst Agent using demand, supply, and compensation inputs. The HR Business Partner reviews trade-offs, adjust assumptions, and approves final recommendations.	Hiring pipelines and budgets are optimized autonomously by a Recruitment Optimization Agent* (Custom Agent). Exceptions are escalated to the HR Business Partner only when talent supply constraints arise.
Cumulative Success Metrics <small>(measured at workflow or overall process level; former useful for tracking but latter a better indicator of actual process improvement)</small>	Usage <ul style="list-style-type: none"> Reduction in Time: Workforce planning and modelling activities AI Adoption: Planning and forecasting workflows 	KPIs Impacted <ul style="list-style-type: none"> Cycle time: Workforce planning Accuracy: Improvement in forecast a &scenario quality 	Workflow Automated <ul style="list-style-type: none"> Workforce cost optimization impact Improvement in strategic workforce readiness Reduction in manual intervention across planning cycles

Finance Function



Top Scenarios for Finance Transformation

As you mature in your Frontier Firm journey...work evolves from human-led Copilot assistance, to agent-supported decisions, and ultimately to agent-executed workflows with humans providing oversight, judgment, and exception handling.

Scenarios	Key processes	Products	Success Metrics
Quote-to-Cash & Revenue	Automate order validation, invoice creation & payment tracking. Speed up cash flow, reduce manual errors & improve visibility across revenue lifecycle.	 Copilot Chat  M365 Copilot  Edit with Copilot in Excel  Edit with Copilot in Word  Edit with Copilot in PowerPoint  Copilot for Finance  Analyst Agent  Researcher Agent  Copilot Studio Agents	<ul style="list-style-type: none"> ✓ Faster execution of core finance work ✓ Higher quality, more consistent financial outputs ✓ More finance activities completed at scale ✓ Stronger visibility into financial performance and risk ✓ Improved confidence in forecasts, close, and decisions ✓ Broader automation across finance workflows
Close acceleration & financial narrative generation	Streamline account reconciliation, flag discrepancies & drafts first-pass financial narratives. Cut close time & support CFO review.		
Intelligent Tax Determination & Treasury Forecasting	Automate tax classification & filing; predict liquidity needs based on real-time financial & market signals. Lower risk & strengthen cash management.		
Predictive Financial Planning & Analysis/Scenario Simulation	Replace static budgeting with rolling forecasts & what-if models that respond to changing market conditions. Drive faster decision-making & more accurate forecasts.		
Touchless AP & P2P Workflow Automation	Automate invoice matching, approvals & payments while flagging duplicate spend & contract discrepancies; cut cycle time & reduce operational cost.		

Click [here](#) for additional details on scenarios, product information, and success metrics.

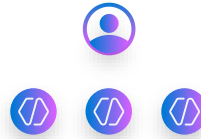
Scenario Planning & Sensitivity Analysis

Pattern 1



Finance Analyst generates what-if models and sensitivity charts using **Edit with Copilot in Excel**; sets up scenarios manually.

Pattern 2



The **Finance Analyst** triggers the **Analyst Agent** to run multi-variable simulations and scenario comparisons, validates the outputs, and selects scenarios for approval.

Pattern 3



A **Custom Planning Agent (Custom Agent)** runs continuous Monte Carlo and multi-driver simulations, adjusts scenarios in real time, and flags high-risk outcomes for human review.

Quote-to-Cash Acceleration & Revenue Intelligence

*Custom built agents

	PATTERN 1	PATTERN 2	PATTERN 3
	Human uses Copilot	Human uses agent, reviews, and approves output	Humans set direction and agents run entire workflows
Smart Cash Application	The Cash Manager uses Copilot Chat to surface historical payment patterns and suggest potential invoice-to-remittance matches directly in chat. Final posting decisions remain with the Cash Manager.	The Cash Manager leverages Edit with Copilot in Excel to draft match recommendations across remittance and invoice tables. Matches are reviewed and approved before posting.	The Cash Application Agent* (Custom Agent) posts cash updates directly to ledgers and routes only exception cases to humans.
Intelligent Collections & Dunning	The Collections Specialist uses Copilot Chat to generate prioritized delinquent account lists and draft outreach emails or call scripts for manual execution. They then manually review and edit drafts before sending.	The Collections Specialist uses the Analyst Agent to build risk-based worklists and the Channels Agent* (Custom Agent) to coordinate outreach cadence and messaging. The Collections Specialist reviews and approves execution.	The Collections Agent* (Custom Agent) executes outreach cadence, negotiates payment plans, and escalates only complex or high-risk exceptions.
Payment Dispute Prediction	The Accounts Receivable Analyst uses Copilot in Excel to surface accounts at risk of late payment and draft recommended resolution steps based on historical trends.	The Accounts Receivable Analyst uses the Analyst Agent to trigger invoice or purchase order checks and draft dispute outreach for confirmation before sending.	The Dispute Resolution Agent* (Custom Agent) continuously monitors risk signals, executes mitigation actions, and escalates anomalies.
Billing Case Triage & Summarization	The Billing Specialist uses Copilot Chat to summarize billing case details, extract key facts, and suggest next-step resolution actions.	The Billing Specialist invokes the Knowledge Agent* (Custom Agent) to populate resolution forms, attach supporting evidence, and route cases to the correct owner. Final validation is manually done by the Billing Specialist .	The Case Resolution Agent* (Custom Agent) resolves standard billing tickets end-to-end and escalates only non-standard scenarios.
Contract Quality Checks & Deal Acceleration	The Contract Manager uses Copilot in Word to flag missing terms or approvals in contracts prior to billing. Review and follow-up are handled manually.	The Contract Manager uses the Researcher Agent to validate clause coverage, identify gaps, and recommend approval paths. The manager signs off prior to submission.	The Contract Validation Agent* (Custom Agent) corrects standard defects, applies approved clauses, and advances deals toward close without manual intervention.
Cumulative Success Metrics <small>(measured at workflow or overall process level; former useful for tracking but latter a better indicator of actual process improvement)</small>	Usage <ul style="list-style-type: none"> • Reduced time: Drafting & information retrieval • AI Adoption across Q2C roles • Improved response quality for billing & collections inquiries 	KPIs Impacted <ul style="list-style-type: none"> • Cash application rate • Case handling time • Deal cycle time • Error rates 	Workflow Automated <ul style="list-style-type: none"> • Share of standard Q2C tasks executed autonomously • Reduction in manual exceptions • Increased focus on strategic finance decisions

Close Acceleration & Financial Narrative Generation

*Custom built agents

	PATTERN 1	PATTERN 2	PATTERN 3
	Human uses Copilot	Human uses agent, reviews, and approves output	Humans set direction and agents run entire workflows
Financial Period Close to Pre Planning	The Finance Manager opens an Excel file with prior close data and asks Copilot in Excel to generate a sample close plan. Using historical patterns and deadlines, Copilot in Excel helps structure the plan, which the manager reviews and edits directly in Excel.	The Finance Manager invokes the Project Manager Agent to generate a structured close plan based on predefined templates. The agent populates tasks, dependencies, and timelines, which the manager reviews and approves before publishing to the team.	The Finance Manager Agent* (Custom Agent) autonomously initiates the month-end close process, generates the close plan, assigns tasks across roles, and monitors progress. Humans intervene only for exceptions or strategic adjustments.
Account Reconciliation	The Finance Analyst manually downloads bank statements, invoices, and general ledger extracts, storing them in Excel. Using Copilot in Excel , the Finance Analyst highlights mismatches, drafts corrective entries, and summarizes reconciliation status. A variance summary is prepared for review.	The Finance Analyst uses Edit with Copilot in Excel to apply matching rules across general ledger entries and bank statements. The agent flags exceptions and proposes journal entries, which the Finance Analyst reviews and approves before posting.	The Reconciliation Agent* (Custom Agent) automatically matches general ledger entries to bank statements, posts adjustments for standard discrepancies, and flags only non-standard items for human review.
Journal Entry (JE) Policy & Compliance Review	The Finance Analyst manually extracts journal entries and uses Copilot in Excel to run policy checks aligned to IFRS/GAAP and internal controls. Copilot Chat summarizes anomalies and helps draft resolution notes, while approvals remain manual.	The Finance Analyst uses the JE Compliance Agent* (Custom Agent) to validate journal entries directly against source systems. Exceptions are surfaced automatically and routed for analyst review before approval.	The JE Compliance Agent* (Custom Agent) drafts and posts compliant journal entries autonomously, enforces IFRS/GAAP and internal policy rules, and escalates only high-risk anomalies. Audit trails and compliance evidence are maintained automatically.
Variance Analysis	The FP&A Analyst consolidates actuals and forecasts and uses Copilot in Excel to suggest potential root causes for variances. A first-pass narrative is drafted manually for management reporting.	The FP&A Analyst uses Edit with Copilot in Excel to ingest actuals and forecasts, perform material variance analysis, and draft narrative explanations. Root causes are reviewed and finalized by the analyst.	The Finance Close Agent* (Custom Agent) continuously monitors variance drivers across ledgers and cost centers, performs root-cause analysis, and generates narrative insights for management reporting. Only unusual or high-impact variances are escalated.
Cumulative Success Metrics <small>(measured at workflow or overall process level; former useful for tracking but latter a better indicator of actual process improvement)</small>	Usage <ul style="list-style-type: none"> Reduced time: Reconciliation support & variance summarization Reduced manual preparation effort during close Faster time to first close review 	KPIs Impacted <ul style="list-style-type: none"> On-time reconciliations Reduction in manual journal entry interventions Reduction in post-close adjustments % of journal entries meeting policy adherence 	Workflow Automated <ul style="list-style-type: none"> Share of close activities executed autonomously Reduction in total cost of close Improved close consistency and audit readiness

Intelligent Tax Determination & Treasury Forecasting

*Custom built agents

	PATTERN 1	PATTERN 2	PATTERN 3
	Human uses Copilot	Human uses agent, reviews, and approves output	Humans set direction and agents run entire workflows
Transaction Tax Classification & Nexus Check (O2C/P2P)	The Tax Analyst asks Copilot Chat questions such as “What tax rate applies to this invoice?” by uploading a PDF invoice. Copilot Chat explains applicable rules and rationale, while final determination remains manual.	The Tax Analyst leverages the Researcher Agent to review batches of transactions, apply tax rules at scale, and draft classification notes. Outputs are reviewed and approved before posting.	The Tax Compliance Agent* (Custom Agent) automatically applies tax rules to transactions and posts results. Human review is triggered only when anomalies or confidence thresholds are breached.
Exemption & Certificate Management (B2B)	The Tax Analyst queries Copilot Chat against existing exemption lists and certificates to identify missing, invalid, or expiring documentation for tax purposes.	The Tax Analyst uses Copilot for Finance to scan exemption certificates, match them to customer records, and draft renewal requests for approval.	The Tax Compliance and Certificate Management Agent* (Custom Agent) autonomously manages certificate renewals, updates records, and issues proactive alerts for upcoming expirations.
Indirect Tax Reconciliation & Return Prep	The Tax Accountant uses Copilot in Excel to clean, normalize, and categorize tax codes, and to perform initial variance analysis between calculated and reported tax amounts.	The Tax Accountant uses the Analyst Agent to detect anomalies across multiple data files and prepare exception lists for return preparation.	The Finance Compliance Agent* (Custom Agent) connects directly to ERP systems, flags anomalies, and posts automated adjustments based on tax code logic.
Daily Cash Positioning & 13-Week Forecast	The Treasury Analyst uses Copilot Chat to review an existing cash forecast and understand how projected balances might change if certain assumptions shift.	The Treasury Analyst uses the Analyst Agent to ingest bank and ERP data, generate an updated cash forecast, and suggest cash movements for approval.	The Cash Positioning Agent* (Custom Agent) autonomously moves cash between accounts using API access, executes approved investment actions, and alerts humans only when shortfalls are detected.
Liquidity & FX Exposure Management	The Risk Analyst uses Copilot Chat to suggest potential hedge strategies based on linked information about currency exposure and liquidity positions.	The Risk Analyst uses the Analyst Agent to upload financial data, calculate exposure levels, and draft hedge recommendations for review.	The Risk Analytics Agent* (Custom Agent) continuously monitors market volatility, calculates exposure, and executes hedge trades automatically within approved policy limits.
Cumulative Success Metrics <small>(measured at workflow or overall process level; former useful for tracking but latter a better indicator of actual process improvement)</small>	Usage <ul style="list-style-type: none"> Productivity gains: Faster tax lookups, exemption checks & variance analysis Cost savings from reduced manual data preparation Improved decision support insights 	KPIs Impacted <ul style="list-style-type: none"> Operational efficiency: Multi-step tax & treasury workflows Quality: Compliance checks & cash forecasts Earlier identification of discrepancies & exposure risks 	Workflow Automated <ul style="list-style-type: none"> Cost reduction: Automated tax posting, certificate renewals & cash movements Scalability: tax compliance, treasury operations, & risk monitoring Reduced regulatory & financial risk

Predictive FP&A and Scenario Simulation

*Custom built agents

	PATTERN 1	PATTERN 2	PATTERN 3*
	Human uses Copilot	Human uses agent, reviews, and approves output	Humans set direction and agents run entire workflows
Rolling Forecasting & Dynamic Budgeting	The Finance Analyst uses Copilot in Excel to build rolling forecasts using historical and market data, and manually updates budgets based on static assumptions.	The Finance Manager invokes Edit with Copilot in Excel to generate forecast adjustments based on real-time business drivers, reviews proposed changes and approves updates.	A FP&A Agent* (Custom Agent) continuously updates forecasts and reallocates budgets based on live drivers, escalating only strategic or high-risk exceptions to the Chief Financial Officer .
Scenario Planning & Sensitivity Analysis	Finance Analyst generates what-if models and sensitivity charts using Copilot in Excel ; sets up scenarios manually.	The Finance Analyst triggers the Analyst Agent to run multi-variable simulations and scenario comparisons, validates the outputs, and selects scenarios for approval.	A Custom Planning Agent* (Custom Agent) runs continuous Monte Carlo and multi-driver simulations, adjusts scenarios in real time, and flags high-risk outcomes for human review.
Variance Analysis & Commentary	The Finance Analyst drafts variance reports and management commentary using Copilot in Word , manually identifying and explaining key deviations.	The Finance Analyst invokes Edit with Copilot in Word to detect anomalies and draft variance narratives, then reviews and approves the commentary before publication.	A Custom FP&A Agent* (Custom Agent) reconciles routine variances automatically, generates explanatory narratives, and escalates material deviations for decision by the Chief Finance Officer .
Cash Flow Forecasting & Optimization	The Finance Analyst forecasts cash flow using Copilot in Excel , applying historical trends and manually maintained assumptions	The Treasury Manager calls Edit with Copilot in Excel to forecast liquidity needs, identify risks, and suggest mitigation actions, approving recommendations before execution.	A Custom Treasury Agent* (Custom Agent) optimizes liquidity and payment timing in real time, executes reallocations within policy guardrails, and escalates exceptions to treasury leadership.
Financial Reporting & Consolidation	The Finance Analyst compiles data and drafts financial reports using Copilot in Word and Copilot in PowerPoint , manually aggregating inputs.	The Finance Manager invokes the Analyst Agent , Edit with Copilot in PowerPoint , and Edit with Copilot in Word to consolidate data, draft reports, and approve outputs before submission.	A Custom Reporting Agent* (Custom Agent) executes end-to-end consolidation, validates eliminations, publishes reports with audit trails, and escalates only unresolved exceptions.
Cumulative Success Metrics <small>(measured at workflow or overall process level; former useful for tracking but latter a better indicator of actual process improvement)</small>	Usage <ul style="list-style-type: none"> • AI adoption: Forecasting and scenario modelling • Reduction in time: Planning & reforecasting activities • Reduction in manual model rebuilds • Planning cycle time reduction 	KPIs Impacted <ul style="list-style-type: none"> • Forecast accuracy improvement (variance vs. actuals) • Scenario turnaround time reduction • % of agent-generated scenarios approved without rework • Variance detection quality 	Workflow Automated <ul style="list-style-type: none"> • % of FP&A workflows fully automated • Time to reforecast after business signal changes • Exception rate requiring CFO review • Planning scalability during peak cycles

Touchless AP & P2P Workflow Automation

*Custom built agents










	PATTERN 1	PATTERN 2	PATTERN 3
	Human uses Copilot	Human uses agent, reviews, and approves output	Humans set direction and agents run entire workflows
Invoice Capture & Coding	The Accounts Payable Specialist uses Copilot Chat to extract key invoice fields from emails or documents and suggest general ledger coding. The Accounts Payable Specialist manually validates and enters the data into the ERP system.	The Accounts Payable Specialist uses an Analyst Agent to read invoices, extract key fields, and propose coding entries. The specialist reviews and approves entries before posting.	An Invoicing Agent* (Custom Agent) automatically extracts invoice data from inbound channels, validates fields against business rules, and posts invoices to the ERP system. Exceptions are routed to the Accounts Payable Specialist .
3-way match (PO, Receipt, Invoice)	The Accounts Payable Specialist uploads invoices and purchase orders and uses Copilot Chat to compare invoice values against PO and receipt data. Copilot Chat highlights mismatches, which is then reviewed and resolved manually.	The Accounts Payable Specialist uses the Analyst Agent to perform automated three-way matching, flag discrepancies, and propose resolution actions. The specialist validates outcomes before approval.	A Finance Agent* (Custom Agent) continuously matches purchase orders, receipts, and invoices, auto-approves compliant transactions, and escalates only unresolved discrepancies.
Vendor Onboarding & Compliance	The Compliance Specialist uses Copilot in Word to summarize vendor requirements and draft onboarding and compliance checklists. All validation and approvals are handled manually by the Compliance Specialist .	The Compliance Specialist uses a Researcher Agent to collect vendor documentation, validate compliance requirements, and assemble approval packets. Final approval remains with the Compliance Specialist .	A Vendor Compliance Agent* (Custom Agent) collects vendor data directly, validates documentation, enforces compliance policies, and completes onboarding end-to-end. Human review occurs only for regulatory or risk exceptions.
Payment Run Preparation	The Accounts Payable Specialist uses Copilot Chat to review upcoming payments, identify due-date risks, and suggest prioritization. Payment scheduling and execution remain manual.	The Accounts Payable Specialist uses an Analyst Agent to detect anomalies, forecast cash impact, and generate a proposed payment schedule for approval.	A Payment Agent* (Custom Agent) batches invoices, schedules payments based on terms and cash position, and executes payments automatically. The agent escalates only unusual amounts or policy breaches.
Spend Analytics & Reporting	The Accounts Payable Analyst uses Copilot in Excel to summarize spend data, explain trends, and draft basic insights for finance leadership review.	The Accounts Payable Analyst uses the Analyst Agent to compile multi-source spend reports, highlight anomalies, and draft commentary for review and distribution.	A Spend Analysis Agent* (Custom Agent) aggregates spend data, detects anomalies, publishes dashboards, and triggers alerts without human intervention.
Cumulative Success Metrics <small>(measured at workflow or overall process level; former useful for tracking but latter a better indicator of actual process improvement)</small>	Usage <ul style="list-style-type: none"> • AI adoption across AP and P2P tasks • Reduction in time: Invoice capture, coding, & payment preparation • Reduction in manual data entry & document lookup • AP processing cycle time reduction 	KPIs Impacted <ul style="list-style-type: none"> • Invoice processing cycle time reduction • Accuracy of agent-generated coding and matching • Reduction in manual exception handling • Approval turnaround time for agent outputs 	Workflow Automated <ul style="list-style-type: none"> • % of AP and P2P workflows fully automated • Touchless invoice processing rate • Exception rate requiring human intervention • Cost per invoice processed reduction

IT Function



Top Scenarios for IT Transformation

As you mature in your Frontier Firm journey...work evolves from human-led Copilot assistance, to agent-supported decisions, and ultimately to agent-executed workflows with humans providing oversight, judgment, and exception handling.

Scenarios	Key processes	Products	Success Metrics
Data Quality & Governance	Detect data anomalies, map lineage & recommend quality fixes. Improve trust in operational and analytical systems while reducing the cost of manual stewardship.	<ul style="list-style-type: none">  Copilot Chat  M365 Copilot  Edit with Copilot in Excel  Purview Agent  Analyst Agent  Researcher Agent  Employee Self-Service Agent  Workforce Insights Agent  Copilot Studio Agents 	<ul style="list-style-type: none"> ✓ Faster execution of core IT support and operations work ✓ Higher quality and consistency of service responses and actions ✓ Increased volume of issues and requests handled ✓ Improved service reliability and operational outcomes ✓ Clearer visibility into operational health, issues, and trends ✓ Broader automation across IT and operations workflows
Software Asset Intelligence & Renewal Optimization	Analyze application usage, contract terms & renewal cycles to identify cost-saving opportunities, reduce shelfware, & optimise enterprise software spend.		
Smart Device Lifecycle Planning & Auto-Provisioning	Predict refresh needs, forecast inventory & automate device provisioning; cut total cost of ownership & ensure employees always have up-to-date tools.		
Service Availability & Incident Prevention	Aggregate telemetry & logs to predict outages, auto-resolve incidents & prioritise root causes. Reduce downtime & improve user experience.		
Digital Adoption Coaching and Behavioral Insights	Provide guided workflows, nudges & role-based learning based on real usage patterns. Boost adoption of new tools & reduce dependence on manual training.		

Click [here](#) for additional details on scenarios, product information, and success metrics.

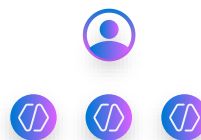
Detect Data Anomalies

Pattern 1



The **Data Steward** uses **Edit with Copilot in Excel** to surface schema drift, null values, duplicates, and basic data quality issues. **Edit with Copilot Chat** helps summarize anomalies and draft an initial investigation plan and quality rules, which the **Data Steward** executes manually.

Pattern 2



The **Data Analyst** invokes an **Analyst Agent** to triage anomalies, validate metrics, compile evidence, and propose remediation actions. The **Data Analyst** reviews findings and approves next steps

Pattern 3



A **Data Quality Agent (Custom Agent)** continuously monitors pipelines, quarantines bad batches, and replays clean data automatically. Only edge cases are escalated to the **Data Steward**.

Data Quality & Governance Intelligence

*Custom built agents

	PATTERN 1	PATTERN 2	PATTERN 3
	Human uses Copilot	Human uses agent, reviews, and approves output	Humans set direction and agents run entire workflows
Detect Data Anomalies	The Data Steward uses Copilot in Excel to surface schema drift, null values, duplicates, and basic data quality issues. Copilot Chat helps summarize anomalies and draft an initial investigation plan and quality rules, which the Data Steward executes manually.	The Data Analyst invokes an Analyst Agent to triage anomalies, validate metrics, compile evidence, and propose remediation actions. The Data Analyst reviews findings and approves next steps.	A Data Quality Agent* (Custom Agent) continuously monitors pipelines, quarantines bad batches, and replays clean data automatically. Only edge cases are escalated to the Data Steward .
Map Data Lineage & Impact Analysis	The Data Engineer uses Copilot in Excel to generate lineage diagrams and audit summaries that highlight upstream and downstream dependencies. The Data Engineer manually validates lineage and assesses business impact.	The Data Engineer uses a Data Schema Agent* (Custom Agent) to validate schema changes, analyze downstream impact, and request approval before changes propagate.	A Lineage Agent* (Custom Agent) maintains end-to-end lineage, updates glossary tags, triggers contract tests, and escalates broken dependencies.
Recommend & Apply Quality Fixes	The Data Steward uses Copilot in Excel to suggest data quality rules (e.g., type matching, reference lookups) and draft change sets. Fixes are reviewed and applied manually.	The Data Analyst uses Edit with Copilot in Excel to apply data quality rules in a shadow copy, run scoring, and generate fix recommendations for steward sign-off.	A Quality Agent* (Custom Agent) executes approved fixes, deduplicates records, writes error logs, and escalates unresolved exceptions.
Enforce Governance Policies	The Compliance Officer uses Copilot in Word to draft sensitivity labels, retention policies, and DLP mappings for regulated datasets. Enforcement and approvals are handled manually.	The Compliance Officer invokes the Purview Agent to evaluate data impact, propose RBAC and MIP updates, and prepare enforcement actions for approval.	A Governance Agent* (Custom Agent) monitors risk indicators, enforces retention and access policies, and pauses non-compliant actions automatically.
Report Data Health & Trust Index	The Data Analyst uses Copilot in Excel and PowerPoint to compile dashboards and monthly trust reports highlighting accuracy, completeness, freshness, and alerts.	The Data Analyst uses Edit with Copilot in Excel to assemble scorecards from audit logs and pipeline metrics, validating outputs before executive sign-off.	A Reporting Agent* (Custom Agent) resolves alerts, updates trust indices, publishes quality measures, and escalates only non-standard issues.
Cumulative Success Metrics <small>(measured at workflow or overall process level; former useful for tracking but latter a better indicator of actual process improvement)</small>	Usage <ul style="list-style-type: none"> Adoption: Anomaly detection & governance analysis Time Savings: Faster investigation and rule drafting cycles Response Quality: Improved trust index accuracy and reduced false positives 	KPIs Impacted <ul style="list-style-type: none"> Data accuracy: Lineage completeness & policy adherence Exception Resolution Time: Faster remediation approval cycles % of datasets reviewed with agent assistance 	Workflow Automated <ul style="list-style-type: none"> % of standard anomaly remediation, lineage updates & policy enforcement executed autonomously % of issues requiring human review Sustained improvement in enterprise data quality & reliability

Software Asset Intelligence & Renewal Optimization

*Custom built agents

	PATTERN 1	PATTERN 2	PATTERN 3
	Human uses Copilot	Human uses agent, reviews, and approves output	Humans set direction and agents run entire workflows
License Inventory & Usage Analysis	The IT Analyst uses Copilot Chat in the Microsoft Admin Center to identify underused and overused licenses. It also explains usage trends and highlights optimization opportunities, which the IT Analyst investigates manually.	The IT Analyst uses an Analyst Agent to ingest usage data from multiple systems, calculate usage versus entitlements, and draft license optimization recommendations. The IT Analyst reviews and approves actions.	A License Inventory Agent* (Custom Agent) continuously reallocates licenses based on usage rules and policy thresholds. The IT Manager intervenes only when anomalies or policy conflicts arise.
Renewal Calendar & Prioritization	The IT Analyst uses Copilot Chat to reference SharePoint lists of vendor contracts and upcoming renewals. The IT Analyst manually prioritizes renewals based on cost, timing, and perceived risk.	The IT Analyst uses an Analyst Agent to review renewal data, assess risk and cost exposure, and generate prioritized renewal recommendations for approval.	A Renewal Management Agent* (Custom Agent) automatically reviews low-risk renewals and escalates only high-impact changes, cost spikes, or compliance concerns.
Compliance & Audit Readiness	The IT Analyst uses Copilot in Word to summarize common compliance gaps and draft audit readiness checklists. Evidence gathering and validation remain manual.	The IT Analyst uses the Purview Security Agent to scan audit logs and compliance datasets, identify trends and anomalies, and prepare readiness summaries for review.	A Compliance and Audit Readiness Agent* (Custom Agent) continuously monitors compliance posture and prepares dashboards for internal and external audits.
Vendor Performance & Cost Benchmarking	The Procurement Manager uses Copilot Chat to research vendor pricing and performance benchmarks from web and internal sources, interpreting findings manually to inform negotiations.	The Procurement Manager leverages the Researcher Agent to gather market benchmarks, analyze vendor history, and draft negotiation strategies. The manager validates findings before engagement.	A Vendor Benchmarking Agent* (Custom Agent) continuously scores vendor performance and cost competitiveness across internal and external sources. The Procurement Manager reviews outputs for negotiation strategy.
Forecasting Future Software Needs	The IT Analyst uses Copilot Chat to create a simple forecast of future license needs based on past usage trends and documented assumptions.	The IT Analyst uses an Analyst Agent to build a forecast model and propose budget allocations based on historical usage and projected demand.	A Forecasting Agent* (Custom Agent) automatically analyzes historical usage, applies predictive models, and adjusts license pools and budget allocations as demand changes.
Cumulative Success Metrics <small>(measured at workflow or overall process level; former useful for tracking but latter a better indicator of actual process improvement)</small>	Usage <ul style="list-style-type: none"> Productivity Gains: Faster license analysis, renewal review, and audit preparation Reduced time spent on manual research and documentation Improved clarity in renewal prioritization and forecasting 	KPIs Impacted <ul style="list-style-type: none"> Automated multi-step analysis for license optimization, renewals, and compliance Quality: More accurate recommendations through structured workflows & integrated data Risk Management: Earlier identification of compliance & cost risks 	Workflow Automated <ul style="list-style-type: none"> Fewer auto-renewals, optimized license allocation & reduced waste Continuous 24/7 license and renewal management with minimal human intervention Proactive monitoring and exception handling reduce compliance and financial exposure

Smart Device Lifecycle Planning & Auto-Provisioning

*Custom built agents

	PATTERN 1	PATTERN 2	PATTERN 3
	Human uses Copilot	Human uses agent, reviews, and approves output	Humans set direction and agents run entire workflows
Planning	The IT Asset Manager extracts historical device and headcount data into Excel and uses Copilot in Excel to clean the dataset and analyze trends. Copilot Chat helps summarize findings and generate charts to support manual device demand planning and procurement recommendations.	The IT Asset Manager uses a Forecasting Agent* (Custom Agent) to ingest HR and ITAM data and automatically generate device demand forecasts. The IT Asset Manager reviews and approves procurement recommendations.	The IT Asset Manager defines budget bands, device ratios, and security guardrails. An Asset Management Agent* (Custom Agent) continuously monitors workforce changes using HR and ITAM data and adjusts procurement plans in real time.
Procurement	The Procurement Lead uses Copilot in Word to draft purchase requisitions and uses Copilot in Excel to generate vendor comparisons and summarize SLA terms. All sourcing decisions and approvals remain manual.	The Procurement Lead oversees exceptions while a Purchase Requisition Agent* (Custom Agent) auto-routes purchase requests, generates purchase orders, tracks approvals, and surfaces procurement bottlenecks for review.	The Procurement Lead defines sourcing policies and thresholds. A Procurement Agent* (Custom Agent) manages end-to-end procurement, from forecast ingestion through purchase order issuance and delivery tracking, escalating only policy or cost exceptions.
Provisioning & Deployment	The IT Administrator provisions devices and sets up user access manually. The administrator uses Copilot Chat to generate configuration profiles, validate compliance requirements, and draft onboarding guides for faster, policy-aligned deployment.	The IT Administrator oversees governance and uses a Provisioning Agent* (Custom Agent) to automate imaging, account setup, ITAM updates, and configuration enforcement. The IT Administrator approves exceptions and monitors dashboards.	The IT Administrator defines provisioning policies and monitors escalations. A Provisioning Agent* (Custom Agent) orchestrate end-to-end device provisioning, enforce compliance, and remediate issues proactively for real-time deployment at scale.
Management	The IT Administrator manages device compliance and configuration baselines and uses Copilot Chat to draft policy summaries and device health reports to support decision-making and reduce manual documentation effort	The IT Administrator uses an Asset Management Agent* (Custom Agent) to automate patching, enforce compliance policies, and update ITAM records. Exceptions are reviewed and approved by the IT Administrator .	The IT Administrator defines device management policies. A Device Management Agent* (Custom Agent) orchestrate end-to-end device operations, enforce adaptive security controls, and remediate issues proactively with continuous compliance monitoring.
Retirement & Disposal	The IT Asset Manager manually orchestrates device retirement and disposal activities. Copilot Chat is used to generate checklists and safe retire/wipe actions, while Copilot in Word is used to draft hold and disposal documentation and compile audit evidence.	The IT Asset Manager invokes an Asset Disposal and Retirement Agent* (Custom Agent) to automate device eligibility checks, revoke access, execute retire and wipe actions, reconcile licensing, and assemble audit-ready evidence for approval.	The IT Asset Manager defines retirement policies and escalation thresholds. An Asset Disposal and Retirement Agent* (Custom Agent) execute end-to-end retirement workflows, including eligibility validation, data sanitization, logistics, ESG reporting, and continuous audit evidence generation.
Cumulative Success Metrics <small>(measured at workflow or overall process level; former useful for tracking but latter a better indicator of actual process improvement)</small>	Usage <ul style="list-style-type: none"> Faster planning, provisioning & documentation Improved visibility into device usage and lifecycle status Fewer manual errors in provisioning and retirement 	KPIs Impacted <ul style="list-style-type: none"> Operational Efficiency: Reduced cycle time across procurement, provisioning & retirement Manual Intervention Reduction: Fewer handoffs through agent-assisted workflows Audit Readiness: More consistent evidence generation & policy adherence 	Workflow Automated <ul style="list-style-type: none"> Majority of device lifecycle actions executed autonomously Real-time device management across workforce changes Proactive enforcement of security, compliance & disposal controls

AI Ops for Service Availability & Incident Prevention

*Custom built agents

	PATTERN 1	PATTERN 2	PATTERN 3
	Human uses Copilot	Human uses agent, reviews, and approves output	Humans set direction and agents run entire workflows
Monitoring & Observability	The IT Ops Engineer reviews telemetry and logs across monitoring tools and uses Copilot Chat to summarize anomalies, highlight trends, and suggest visualization improvements to support faster detection.	The IT Ops Engineer sets monitoring goals and validates insights while a Monitoring Agent* (Custom Agent) continuously correlates telemetry, flags anomalies, and recommends actions to reduce alert noise and fatigue.	The IT Ops Engineer defines monitoring objectives while a Monitoring Agent* (Custom Agent) continuously collects telemetry, detects anomalies, and updates dashboards in real time, escalating only critical issues.
Anomaly Detection	The IT Ops Analyst investigates alerts and uses Copilot Chat to summarize anomaly clusters, rank alerts by severity, and surface likely causes to support manual triage.	The IT Ops Analyst reviews prioritized anomaly clusters while an Anomaly Detection Agent* (Custom Agent) correlates signals across systems, identifies emerging risks, and proposes root cause hypotheses for approval.	The IT Ops Analyst defines detection policies while an Anomaly Detection Agent* (Custom Agent) detects, correlates, and prioritizes alerts end-to-end, escalating only low-confidence or high-impact cases.
Root Cause Analysis	The IT Ops Engineer collects logs and dependencies and uses Azure Copilot and Copilot Chat to suggest probable root causes and remediation options, while retaining full responsibility for diagnosis and resolution decisions.	The IT Ops Engineer defines RCA strategy while an RCA Reasoning Agent* (Custom Agent) analyzes historical incidents, dependency maps, and configuration data to propose likely failure points and remediation paths.	The IT Ops Engineer defines RCA guardrails while an RCA Agent* (Custom Agent) executes root cause analysis independently, identifies failure points, and recommends resolution steps, requiring approval only for high-risk changes.
Incident Prediction & Prevention	The IT Ops Analyst reviews historical incident data and uses Azure Copilot and Copilot Chat to identify risk patterns, forecast potential hotspots, and recommend preventive actions for proactive planning.	The IT Ops Analyst sets thresholds and reviews predictions while a Trend Forecasting Agent* (Custom Agent) runs predictive models to identify potential failures and recommends preventive scripts or actions.	The IT Ops Analyst defines prevention objectives while a Prevention Agent* (Custom Agent) predicts incidents and executes preventive actions without human input, escalating only when confidence thresholds are not met.
Incident Response & Resolution	The Incident Manager coordinates response activities and uses Copilot Chat to draft resolution steps, validate runbook compliance, and support faster execution	The Incident Manager approves critical actions while a Task Assignment Agent* (Custom Agent) auto-assigns response tasks, recommends fixes, and executes low-risk remediation steps autonomously.	The Incident Manager defines resolution policies while a Resolution Agent* (Custom Agent) orchestrates end-to-end incident response workflows, notifying humans only for compliance checks or governance review.
Post-Incident Review	The IT Ops Analyst documents incidents and uses Copilot Chat to summarize learnings, draft post-incident reports, and update knowledge base content for continuous improvement.	The IT Ops Analyst reviews RCA summaries while an Incident Review Agent* (Custom Agent) drafts reports, updates knowledge base articles, and suggests systemic improvements for future prevention.	The IT Ops Analyst reviews outcomes while an Incident Response Agent* (Custom Agent) generates RCA documentation, updates knowledge bases, recommends systemic changes, and supports continuous service reliability improvements.
Cumulative Success Metrics <small>(measured at workflow or overall process level; former useful for tracking but latter a better indicator of actual process improvement)</small>	Usage <ul style="list-style-type: none"> Faster identification of incidents and anomalies Improved resolution speed through assisted analysis Higher quality and consistency of incident documentation 	KPIs Impacted <ul style="list-style-type: none"> Reduced alert noise and manual investigation effort More accurate anomaly detection and prioritization Increased identification of risks before incidents occur 	Workflow Automated <ul style="list-style-type: none"> Majority of incidents handled end-to-end by agents Improved uptime through predictive prevention Humans focused primarily on governance & high-risk decisions

Digital Adoption Coaching & Behavioral Insights

*Custom built agents

	PATTERN 1	PATTERN 2	PATTERN 3
	Human uses Copilot	Human uses agent, reviews, and approves output	Humans set direction and agents run entire workflows
Guided Onboarding & Training	The End User asks Copilot Chat for step-by-step help when learning new tools and technologies, relying on reactive guidance during onboarding.	The IT Enablement Lead reviews guidance while an ESS Agent scans content repositories and Microsoft Graph data to proactively surface relevant onboarding materials and in-context guidance.	The IT Enablement Lead defines onboarding guardrails while an Adoption Agent* (Custom Agent) delivers personalized onboarding journeys, answers routine questions, and escalates only edge cases.
Contextual App Guidance & Nudges	The End User uses Copilot Chat to receive hints on how to navigate applications and follow best practices, with guidance surfaced on demand.	The IT Enablement Lead validates recommendations while an ESS Agent retrieves contextual guidance across HR and IT applications and proposes usage nudges based on user behavior.	The IT Enablement Lead sets policy boundaries while a Custom In-Flow Guidance Agent* (Custom Agent) delivers real-time corrections and best-practice nudges at the point of need, requiring human confirmation only for sensitive actions.
Role-Based Learning & Skill Development	The Learner prompts Copilot Chat for role-specific learning suggestions, coaching tips, and mentorship guidance based on stated needs.	The Learning Manager reviews recommendations while a Learning Agent suggests role-specific microlearning paths aligned to job responsibilities and usage patterns.	The Learning Manager governs outcomes while a Learning Agent* (Custom Agent) proactively delivers personalized learning, identifies skill gaps, and provides targeted coaching based on work patterns.
Adoption Analytics & Targeted Interventions	The IT Adoption Lead asks Copilot Chat to summarize adoption data and provide insights, then manually designs and executes improvement actions.	The IT Adoption Lead approves actions while Workforce Insights Agent analyzes adoption trends, flags underutilized features, and recommends targeted enablement campaigns.	The IT Adoption Lead defines objectives while an Adoption Optimization Agent* (Custom Agent) executes interventions, reallocates licenses, and nudges users to adopt Copilot and agents for high-value tasks.
Self-Service Support & Knowledge Agent	The End User asks Copilot Chat for help when issues arise, with support remaining reactive and escalating to human support for unresolved questions.	The IT Support Manager oversees escalations while a Chatbot* (Custom Agent) resolves common questions through chat and routes complex issues to human specialists.	The IT Support Manager oversees quality while an ESS Agent resolves the majority of routine queries autonomously and escalates novel or high-risk cases to specialist teams.
Cumulative Success Metrics (measured at workflow or overall process level; former useful for tracking but latter a better indicator of actual process improvement)	Usage <ul style="list-style-type: none"> Growth in active Copilot usage across roles Improved self-reported comfort with new tools Faster onboarding through assisted guidance 	KPIs Impacted <ul style="list-style-type: none"> Increased feature usage driven by proactive guidance Higher completion & relevance of role-based learning Reduction in repetitive support requests 	Workflow Automated <ul style="list-style-type: none"> Majority of adoption journeys executed by agents Sustained improvement in tool usage & task efficiency Humans focus on governance and high-impact change

Enterprise-level Transformation and Scenarios



Enterprise-level transformation and scenarios

This section sets the **strategic blueprint for enterprise-level transformation**, focusing on how organizations can evolve into “Frontier Firms” by embedding AI and agent-driven workflows at the core of their operations.

- ✓ Operating model
- ✓ Workforce transformation scenarios including people and learning agents
- ✓ Technology transformation considerations and requirements

Frontier Firms must also **measure success** of their AI transformation using a blend of telemetry- and employee sentiment-based measures, plus key performance and financial indicators where appropriate to assess the business impact of transformation.

- ✓ How people work
- ✓ How people feel
- ✓ Business impact

Frontier Transformation Playbook

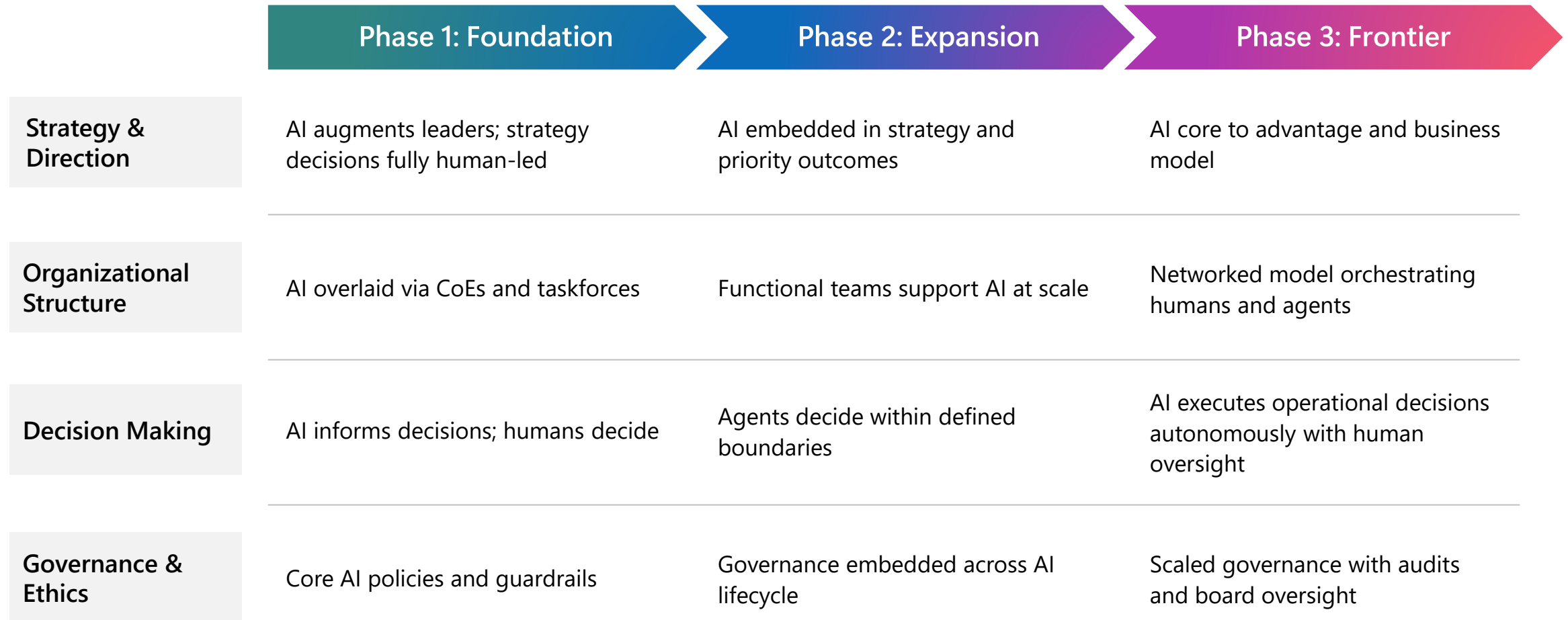
Read the in-depth strategies for transforming with AI here: aka.ms/frontierfirmplaybook.

	Phase 1: Foundation	Phase 2: Expansion	Phase 3: Frontier
Frontier Phase	Human with assistant. Every employee has an AI assistant that helps them work better and faster.	Human-agent teams. Agents join teams as “digital labor,” taking on specific tasks at human direction.	Human-led, agent-operated. Humans set intent, strategy, ethics, and oversight, while autonomous AI agents run significant workflows.
Operating Model	Lay leadership foundations; add AI as tech overlay	Revamp strategy to unlock human-AI collaboration and automation	Embed AI at the core to drive efficiency, capacity, and growth
Workforce	Build AI literacy, early trust, and AI-augmented teams	Embed human-AI collaboration, reskill at scale, and hybrid roles	Operate with agent-led teams, advanced skills, and trust
Technology	Establish secure, compliant AI-ready technical foundations	Scale governed, reliable AI across the enterprise	Orchestrate unified, continuously improving AI operations

Enterprise & Functional Scenarios

Operating Model Transformation

Read the in-depth strategies for transforming your Operating Model in the Frontier Playbook: aka.ms/frontierfirmplaybook













Workforce Transformation

Read the in-depth strategies for transforming your Workforce in the Frontier Playbook: aka.ms/frontierfirmplaybook

	Phase 1: Foundation	Phase 2: Expansion	Phase 3: Frontier
Culture	Leaders emphasize AI as tool to augment human work	Human-AI collaboration embedded in norms	Continuous learning and innovation culture
Skills Development	Baseline AI literacy	Scaled reskilling for AI+X roles	Advanced human skills prioritized as work evolves
Team Composition & Roles	Managers oversee AI-augmented teams	Hybrid roles bridge business and AI	Humans oversee agent fleets
Change Readiness & Trust	Trust in AI is emerging among early adopters	Confidence and trust are growing across teams	High adaptability and trust are the norm

Top Scenarios for Workforce Transformation

Scenarios	Key processes	Products	Success Metrics
<p>People & Skill Discovery</p>	<p>Find colleagues with specific skills for collaboration. Understand the skills of your collaborators and prep for the meetings. Find experts for mentoring and networking. Identify team members with specific skills for project assignments.</p>	<ul style="list-style-type: none">  Copilot Chat  M365 Copilot  People Skills  People Agent  Workforce Insights Agent  Learning Agent  Employee Self Service  Copilot Studio Agents  Copilot Analytics  Viva Glint and Pulse 	<ul style="list-style-type: none"> ✓ Adoption across multiple functions, roles and regions ✓ Improvement in employee satisfaction and sentiment ✓ Consistency and repeatability across teams ✓ Productivity improvement ✓ Learning-to-usage conversion ✓ Internal mobility ✓ Improved information dissemination across employees
<p>Skills Inferencing & Workforce Insights</p>	<p>Identify skills gaps and surpluses. Strategic skills planning. Strategic workforce planning (e.g., hiring, reorganizations). Tracking skills over time. View team structure, level mix, and skills distribution for actionable organizational insights.</p>		
<p>Learning & Skill Development</p>	<p>Receive tailored learning suggestions based on needs. Curate learning paths. Deliver micro-learning. Assess skill gaps and readiness.</p>		
<p>Employee Self Service</p>	<p>Enable employees to independently retrieve trusted information, initiate and complete common HR and IT tasks, resolve issues through guided self-help, and escalate to human support when needed</p>		
<p>Employee Feedback & Measuring Success</p>	<p>Telemetry and employee sentiment-based measures to assess how the workforce is maturing along the AI transformation. KPIs and financial indicators to assess business impact.</p>		

People Skills Inferencing for HR | Planning, Discovery, and Learning

	PATTERN 1	PATTERN 2	PATTERN 3*
	Human uses Copilot	Human uses agent, reviews, and approves output	Humans set direction and agents run entire workflows
Identify Skills Gaps and Surpluses	The HR Leader manually uses Copilot Chat and Skills Landscape Reports to summarize current organizational skills based on job titles, role expectations, and project requirements. Copilot and Skills Landscape Reports surfaces potential gaps or surpluses, while the HR Leader validates interpretations and implications.	People Skills with Copilot Chat ingests role definitions, skills taxonomies, and project requirements to generate validated skill gap and surplus summaries, including accuracy and recency indicators. The HR Leader reviews results for context and prioritization.	People Skills continuously monitors skills across enterprise systems (e.g., HRIS, LinkedIn, learning platforms), detects gaps in real time, and triggers workforce or upskilling recommendations with custom integration & orchestration. The HR Leader reviews only exceptions or major intervention strategies.
Strategic Skill Planning	The L&D Leader uses Copilot Chat to suggest learning paths aligned to individual or team skill gaps. Copilot Chat recommends relevant courses or learning modules from learning systems, and the L&D Leader curates and finalizes the plan.	People Skills builds tailored upskilling plans aligned to strategic priorities (e.g., AI adoption, transformation initiatives), including timelines, progress projections, and resource requirements. The L&D Leader approves and initiates rollout.	People Skills orchestrates ongoing upskilling programs, tracks completion, dynamically adjusts learning plans, and reprioritizes skills as business needs evolve. The L&D Leader intervenes only for strategic changes.
Strategic Workforce Planning (Hiring, Reorganizations)	The HR Analyst uses CopilotChat to summarize existing workforce capabilities and identify potential shortages for upcoming roles. Hiring or reorganization proposals are built manually and reviewed by HR leadership.	People Skills forecasts workforce needs using historical data and skill trends, and proposes hiring, cross-skilling, or restructuring options. The HR Analyst reviews and refines recommendations before approval.	People Skills autonomously flags hiring needs, role evolution, and surplus risk, and initiates job description drafts or internal mobility workflows. The HR Analyst provides final approval for high-impact decisions.
Tracking Skills Over Time	The L&D Leader uses Copilot Chat and Skills Landscape Reports to generate point-in-time skills assessments on request and manually compares results across reporting periods.	People Skills maintains a historical skills dataset and generates trend insights across teams, roles, and functions. The L&D Leader reviews dashboards and addresses anomalies.	People Skills continuously updates skill profiles using project outputs, learning completion data, and performance signals, identifying skill decay or emerging strengths. The L&D Leader handles compliance or review exceptions only.
Develop New Skills	Employees prompt Copilot Chat for curated AI and digital skills resources. CopilotChat generates personalized learning recommendations, while employee's self-direct development.	People Skills automatically maps skill needs to roles, recommends learning pathways, and tracks skill mastery progression. The L&D Leader approves learning plans and sequencing.	People Skills runs AI readiness and skills acceleration programs at scale, provides readiness scoring, identifies lagging groups, and triggers learning nudges or boosters. The L&D Leader sets high-level strategic objectives (e.g., "80% AI-literate workforce").
Cumulative Success Metrics <small>(measured at workflow or overall process level; former useful for tracking but latter a better indicator of actual process improvement)</small>	Usage <ul style="list-style-type: none"> • Time to Identify Skill Gaps: Faster insight through assisted summaries • Reduced Manual Effort: HR & L&D analysis time • Learning Discovery Efficiency: Faster matching of skills to learning content 	KPIs Impacted <ul style="list-style-type: none"> • Skill Gap Detection Accuracy: Higher confidence in validated skill insights • Recommendation Adoption Rate: Increased uptake of agent-generated learning plans • Planning Cycle Time: Faster workforce & skills planning cycles 	Workflow Automated <ul style="list-style-type: none"> • Continuous Skills Monitoring Coverage: Share of workforce with real-time skill profiles • Autonomous Skill Intervention Rate: Percentage of upskilling actions triggered automatically • Strategic Readiness Lift: Improved enterprise readiness for priority capabilities (e.g., AI, digital)

*Assumes custom agent orchestration built on People Skills signals. This pattern represents an aspirational future state of Copilot-enabled workflows. The capabilities shown are not available in product today and are intended to illustrate long-term direction.

People Agent for Employees | People and Skills Discovery

	PATTERN 1	PATTERN 2	PATTERN 3*
Find colleagues with specific skills for collaboration	<p>Human uses Copilot</p> <p>The Employee prompts Copilot Chat to identify colleagues with a specific skill. Copilot Chat searches internal directories, profiles, and project documentation, while the employee manually validates relevance and initiates outreach.</p>	<p>Human uses agent, reviews, and approves output</p> <p>The People Agent automatically identifies coworkers with the required skills by combining the Skills Graph with project context. The People Agent generates a skill-based shortlist using recency, and relevance scoring, which the Employee reviews and approves before initiating contact.</p>	<p>Humans set direction and agents run entire workflows</p> <p>The People Agent proactively monitors project needs and proposes collaboration suggestions that respect employee visibility preferences and opt-in settings. The People Agent can automatically initiate outreach or meeting suggestions, with the Employee intervening only for unusual, sensitive, or exception cases.</p>
Understand the skills of your collaborators and prep for the meetings	<p>The Employee asks Copilot Chat what skills meeting participants have. Copilot Chat summarizes information from profiles, shared files, and prior work, while the employee synthesizes the information to assess relevance and prepare accordingly.</p>	<p>The People Agent automatically builds collaborator skill briefs ahead of meetings. These briefs include inferred skills, project history, strengths, and recent outputs. The Employee reviews and approves the preparation packet before the meeting.</p>	<p>The People Agent autonomously generates and distributes Skills Prep Packets for relevant meetings, incorporating inferred skills, project context, and recent deliverables from Skills Graph signals. The People Agent detects new participants and updates briefs automatically, while the Employee intervenes only when sensitivity or judgment is required.</p>
Find experts for mentoring and networking	<p>The Employee asks Copilot Chat who might mentor them on a specific skill or topic. Copilot Chat scans internal resources and suggests potential experts, while the Employee manually reviews suitability and initiates outreach.</p>	<p>The People Agent identifies best-fit experts by evaluating experience, availability, and relevance. The People Agent drafts outreach messages or mentoring match suggestions, which the Employee reviews and approves or adjusts.</p>	<p>The People Agent automatically suggests mentors for new roles, promotions, or emerging skill-gap indicators. The People Agent initiates matching workflows, manages cadence, and enforces coaching availability and HR consent policies. The Employee handles only exceptions, escalations, or delicate mentoring decisions.</p>
<p>Cumulative Success Metrics <small>(measured at workflow or overall process level; former useful for tracking but latter a better indicator of actual process improvement)</small></p>	<p>Usage</p> <ul style="list-style-type: none"> • Collaborator Search Time: From search prompt to shortlist surfaced • Meeting Prep Time: From meeting request to user-assembled materials • Expert Recommendation Accuracy: Correct expert matches • Skill Profile Summary Accuracy: Validated correct skill attributes 	<p>KPIs Impacted</p> <ul style="list-style-type: none"> • Collaborator Match Relevance Score: Weighted score of proficiency, recency, & contextual match • Skill Brief Completion Throughput: Skill briefs generated • Mentoring Match Suitability Score: Expertise match, availability & experience relevance • Approval Rate of People Recommendations: Accepted recommendations 	<p>Workflow Automated</p> <ul style="list-style-type: none"> • Proactive Collaboration Suggestion Rate: Agent-initiated suggestions • Auto-Initiated Outreach Ratio: Automated outreach events • Skill Brief Auto-Update Frequency: Autonomous refreshes • Exception Handling Rate: Suggestions requiring human override

*Assumes custom agent orchestration built on People Skills signals. This pattern represents an aspirational future state of Copilot-enabled workflows. The capabilities shown are not available in product today and are intended to illustrate long-term direction.

Learning Agent for Employees and L&D Augmentation

	PATTERN 1	PATTERN 2	PATTERN 3*
	Human uses Copilot	Human uses agent, reviews, and approves output	Humans set direction and agents run entire workflows
Identify Learning Needs	The Employee manually searches for learning content (e.g., "courses on strategic communication") using Copilot Chat . Copilot surfaces general results, but the Employee must manually refine relevance and applicability.	The Employee uses the Learning Agent to receive tailored learning suggestions based on their role, recent work patterns, and identified skill gaps. The Employee reviews and approves recommended modules before starting.	The Learning Agent automatically detects repeated learning signals from approved data sources (e.g., work artifacts, meetings, documents), updates the skill graph, and refreshes learning recommendations without prompting. The Employee intervenes only to adjust data categories or scope.)
Curate Learning Paths	The Employee manually compiles learning modules from SharePoint, LinkedIn Learning, and internal wikis. Copilot Chat summarizes content, but the Employee assembles and manages the learning path themselves.	An L&D Manager uses the Learning Agent to automatically assemble curated learning paths from enterprise content sources (SharePoint, LinkedIn Learning, Microsoft Graph). The L&D Manager reviews and approves paths before rollout to individuals or teams.	The Learning Agent refreshes curated learning paths on a recurring basis using new content, learner progress, performance gaps, and enterprise priorities. Humans intervene only for exceptions or strategic overrides.
Deliver "Tip of the Day" & Micro-Learning	The Employee asks Copilot Chat for tips (e.g., "How can I use Microsoft 365 more effectively?"). The output is generic and must be manually filtered for relevance.	The Learning Agent delivers context-aware "Tip of the Day" guidance based on the Employee's ongoing work (files opened, apps used, meeting preparation). The Employee chooses whether to act on or save the suggestion.	The Learning Agent proactively identifies upcoming work (e.g., meetings, tasks, role changes) and delivers just-in-time micro-learning, role-play guidance, and practice content automatically.
Skill Gap Assessment + Readiness	The Employee manually completes assessments or browses LMS content for "basic" or generic skills. Copilot Chat summarizes results but does not personalize recommendations.	The Learning Agent prompts the Employee to complete targeted assessments. Based on results, the Employee reviews and approves personalized learning modules to close identified skill gaps.	The Learning Agent continuously monitors the employee's evolving skill profile, refreshes recommended content based on assessments and skill drift, and adjusts readiness indicators automatically. Human review occurs only for exceptions.
Cumulative Success Metrics <small>(measured at workflow or overall process level; former useful for tracking but latter a better indicator of actual process improvement)</small>	Usage <ul style="list-style-type: none"> Learning Discovery Time: Faster identification of relevant learning content through assisted search Learning Curation Effort: Reduced time spent assembling learning paths manually Learning Content Relevance: Improved clarity and usefulness of summarized learning options 	KPIs Impacted <ul style="list-style-type: none"> Learning Path Adoption Rate: Increased uptake of agent-generated learning paths Skill Gap Closure Velocity: Faster progress toward closing identified skill gaps Planning Cycle Time Reduction: Reduced time to design & approve learning programs 	Workflow Automated <ul style="list-style-type: none"> Autonomous Learning Coverage: Share of workforce receiving continuously refreshed learning paths Just-in-Time Learning Activation Rate: % of learning interventions triggered automatically Enterprise Readiness Lift: Improved workforce readiness for priority capabilities (e.g., AI, leadership, digital skills)

*Assumes custom agent orchestration built on People Skills signals. This pattern represents an aspirational future state of Copilot-enabled workflows. The capabilities shown are not available in product today and are intended to illustrate long-term direction.

Workforce Insights Agent for HR | Workforce Planning

	PATTERN 1	PATTERN 2	PATTERN 3
View Team Structure, Level Mix, & Skills Distribution	<p>Human uses Copilot</p> <p>The Leader prompts Copilot Chat with questions such as “Show me the structure of my team.” Copilot Chat summarizes team composition, level mix, and skill distribution as static snapshots, which the Leader manually interprets to identify potential risks and opportunities.</p>	<p>Human uses agent, reviews, and approves output</p> <p>The Workforce Insights Agent automatically generates team intelligence packets that include organizational structure, confidence scores, data freshness timestamps, level-mix signals, skill distribution, and density of critical roles. The Leader reviews and approves the summaries for planning and reporting.</p>	<p>Humans set direction and agents run entire workflows</p> <p>The Workforce Insights Agent continuously monitors organizational changes, including team shifts, skill evolution, and level mix. The agent proactively surfaces insights, alerts, and risks such as skill gaps, leadership imbalances, and overload signals. The Leader intervenes only for major strategic decisions or anomalies.</p>
Identify Team Members with Specific Skills to Inform Project Assignments	<p>The Leader asks Copilot Chat questions such as “Who on my team knows skill X?” Copilot Chat returns employee profiles and inferred skills, and the Leader manually matches skills to project roles.</p>	<p>The Workforce Insights Agent matches team skills to upcoming project requirements, generates ranked staffing recommendations using proficiency scoring and capability maps, and proposes assignments. The Leader reviews and approves recommended staffing moves.</p>	<p>The Workforce Insights Agent proactively evaluates upcoming project demand and team capacity, automatically proposing role assignments, backfills, and cross-skilling recommendations. The Leader intervenes only for sensitive staffing or performance-critical decisions.</p>
Identify Actionable Organizational Insights for Workforce Management	<p>The Leader asks Copilot Chat for workforce trends, such as emerging skill gaps or workload risks. Copilot Chat produces point-in-time summaries, and the Leader manually determines appropriate actions.</p>	<p>The Workforce Insights Agent analyzes organizational patterns over time and drafts insights on talent bottlenecks, succession gaps, over- or under-skilled areas, and internal mobility opportunities. The Leader reviews insights and approves actions before execution.</p>	<p>The Workforce Insights Agent autonomously identifies workforce opportunities and risks, such as rising attrition signals or declining skill density, and triggers workflows for mobility, learning prescriptions, or restructuring. The Leader sets direction while the Workforce Insights Agent manages execution.</p>
<p>Cumulative Success Metrics (measured at workflow or overall process level; former useful for tracking but latter a better indicator of actual process improvement)</p>	<p>Usage</p> <ul style="list-style-type: none"> Time to Retrieve Org Insights: Faster insight through assisted summaries Manual Analysis Effort: Reduced time spent compiling workforce & skills data Workforce Visibility: Clearer snapshots of structure, level mix, & skill distribution 	<p>KPIs Impacted</p> <ul style="list-style-type: none"> Insight Packet Quality: Higher confidence in validated team & skills summaries Staffing Recommendation Fit: Better alignment of suggested assignments to role & capability needs Planning Cycle Time Reduction: Faster workforce planning cycles with agent-assisted analysis 	<p>Workflow Automated</p> <ul style="list-style-type: none"> Continuous Org Monitoring Coverage: Share of org tracked with real-time structure & skills signals Autonomous Staffing Suggestion Rate: Increased share of staffing moves proposed automatically Workforce Risk Detection Latency: Faster detection of emerging risks (skill gaps, attrition, imbalance)

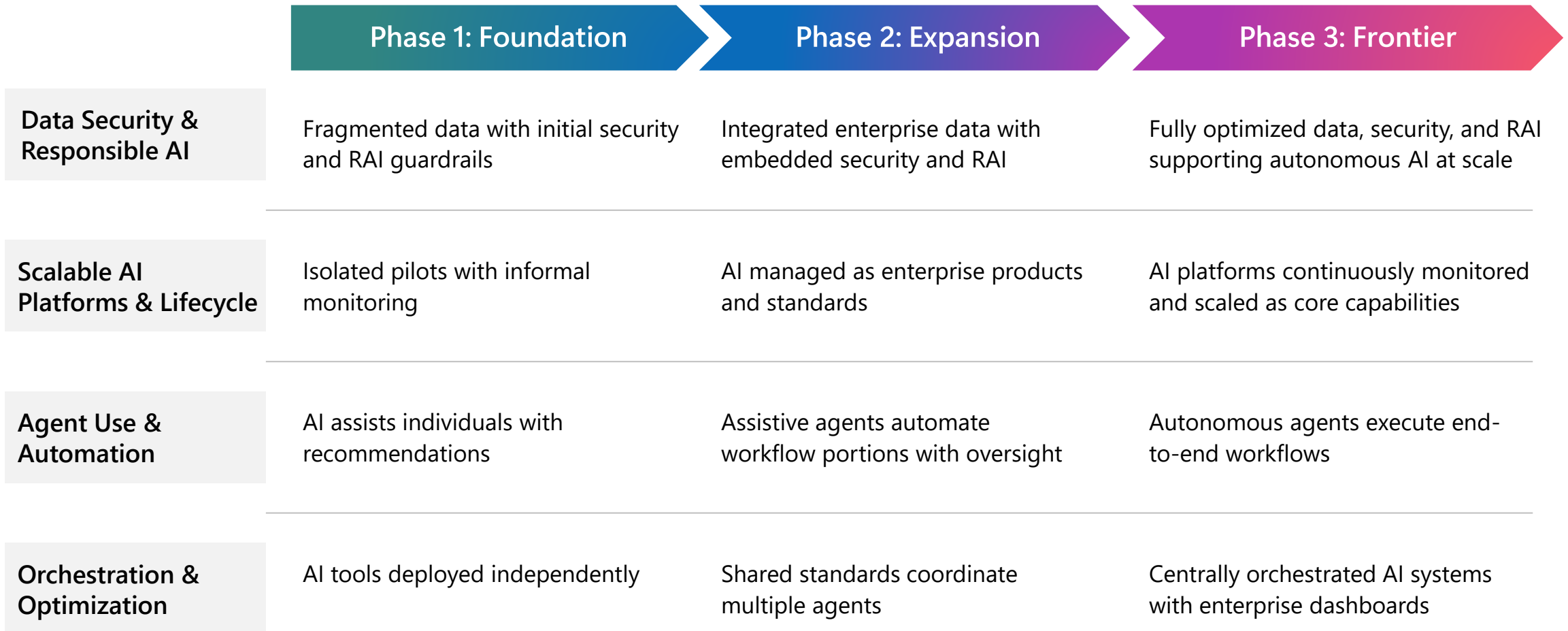
Employee Self Service Agent (ESS)

	PATTERN 1	PATTERN 2	PATTERN 3*
	Human uses Copilot	Human uses agent, reviews, and approves output	Humans set direction and agents run entire workflows
Answer Policies & Knowledge Questions	Employee asks Copilot Chat about policies (“What’s our parental leave policy?”). Copilot Chat searches documents but may surface generic content requiring manual review. Copilot may surface inaccurate or outdated information if documentation is not up to date or duplicated.	Employee asks ESS Agent and retrieves verified, policy-aligned answers from approved sources (HRIS, SharePoint, SOP libraries). Summaries include confidence indicators and links. Employee gets the right answers faster from official knowledge sources.	ESS Agent proactively surfaces policy updates, eligibility changes, and compliance reminders. Answers are auto-validated and version-controlled. Only exceptions or sensitive topics require human approval.
Fix My HR/IT Issue & Troubleshoot	Employee manually asks Copilot Chat for help (“Why can’t I access payroll?”). Copilot gives guidance, but employee must navigate multiple systems, follow instructions, or submit a ticket themselves.	Employee asks ESS Agent to diagnose common HR/IT issues using structured troubleshooting flows (Workday, M365, identity, device, payroll). It drafts a fix, or pre-populates a ticket. Employee reviews and approves.	ESS Agent detects issue signals (login failures, missing access, incomplete tasks), runs automated troubleshooting, and executes fixes or opens tickets automatically. Human only reviews anomalies or high-risk changes.
Submit & Track Requests (HR, IT, Facilities, Access)	Employee uses Copilot Chat to draft a request manually (“Help me request a monitor”). Still must locate correct form/system and submit it themselves.	Employee asks ESS Agent for help to order a new monitor. ESS responds with correct HR/IT form, pre-fills the request, and submits it after employee approval. Employee can ask ESS agent for status updates and agent responds with latest details.	ESS Agent predicts routine requests (expiring access, onboarding needs, equipment refresh), initiates forms automatically, and updates workflow status without user action. Exceptions routed to employee or manager for review.
Manage Employment & Personal Data Changes	Employee asks Copilot Chat how to change personal info (address, tax forms, bank info) but still navigates systems manually.	Employee asks ESS Agent to change personal info. The Agent completes the action on behalf of the employee, without them ever having to leave the flow of the conversation.	ESS Agent detects life-event triggers (name change signals, location changes, org moves) and automatically drafts updates across HR, payroll, IT systems. Humans approve regulatory or cross-system exceptions.
Cumulative Success Metrics (measured at workflow or overall process level; former useful for tracking but latter a better indicator of actual process improvement)	<ul style="list-style-type: none"> Faster answers vs. searching portals or documents Time savings from Copilot summarizing policies, instructions, troubleshooting steps Reduced confusion navigating HR, IT, and facilities systems Improved self-service confidence (employees feel supported, even though they still submit requests manually) Lower barrier to adoption (easy entry point to AI) 	<ul style="list-style-type: none"> Substantial reduction in manual effort Ticket deflection increases Higher process consistency Reduction in errors Shorter cycle times Improved employee sat Trust increases Employees begin to rely on the agent as the primary entry point for HR/IT support 	<ul style="list-style-type: none"> High levels of automation (<70–90% of requests) Proactive issue detection ESS fixes problems without employee friction Seamless cross-system execution Operational efficiency surge Experience personalization Enterprise-level consistency & governance Policies always up to date Workflows always compliant Drift or errors automatically corrected

*Assumes custom agent orchestration built on People Skills signals. This pattern represents an aspirational future state of Copilot-enabled workflows. The capabilities shown are not available in product today and are intended to illustrate long-term direction.

Technology Transformation

Read the in-depth strategies for transforming your Technology in the Frontier Playbook: aka.ms/frontierfirmplaybook



Measuring Success

Evaluating the success of individual AI solutions tells part of the transformation story, but Frontier Firms must also focus on the bigger picture, using a blend of telemetry and employee sentiment-based measures to assess how they are maturing along the journey, and using KPIs and financial indicators to assess the business impact of transformation.

	Phase 1: Foundation	Phase 2: Expansion	Phase 3: Frontier
How people work (telemetry) Copilot Analytics	<ul style="list-style-type: none"> ✓ Adoption ✓ Time savings ✓ Tasks assisted 	<ul style="list-style-type: none"> ✓ Adoption and agent landscape ✓ Capacity augmentation ✓ Business metrics 	<ul style="list-style-type: none"> ✓ Autonomous agent twins or agent bosses ✓ Work redesign
How people feel (sentiment) Viva Glint Viva Pulse Viva Engage MS Forms	<ul style="list-style-type: none"> ✓ AI Skilling ✓ Culture ✓ Communication ✓ Change readiness ✓ Change adaptation ✓ Innovation potential ✓ Process barriers ✓ Psychological safety ✓ Strategic alignment 	<ul style="list-style-type: none"> ✓ Collaboration norms ✓ Decision making ✓ Empowerment ✓ Learning 	<ul style="list-style-type: none"> ✓ Strategy ✓ Culture ✓ Innovation and creativity

For more details, see [Frontier Firm Playbook](#).