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COMMUNITY CONFERENCE

# Operationalizing Agents At Scale: The Agentic COE Playbook

Saurabh Pant, Amer Kaleem

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**Saurabh Pant**

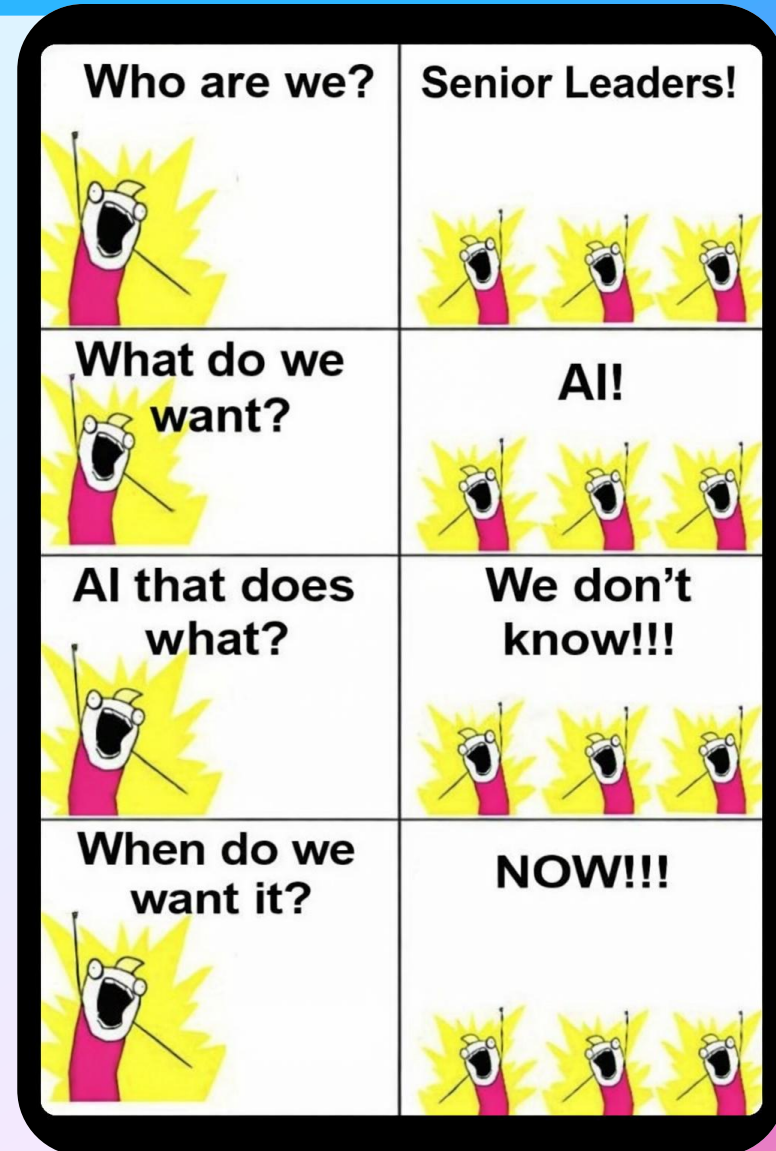
General Manager, CAPE  
/sgpant



**Aamer Kaleem**

Principal PM Manager, CAPE  
/akaleem

# Why transform with AI?



# What is driving your AI agenda?



# What is driving your AI agenda?



Supercharge  
your people



Wow your  
customers


# What is driving your AI agenda?



Supercharge  
your people



Wow your  
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Automate the  
back office  
end-to-end

# Frontier Transformation Patterns

Different agents, different rules. Frontier firms make this explicit by categorizing agent work into a small number of repeatable transformation patterns.

## Enrich

employee experiences

### Employee AI Enablement

- Make people more capable
- Every employee uses capable AI assistants

### Business Expert Empowerment

- Scale SME judgment
- Expert's knowledge scaled to the org.

## Reinvent

customer engagement

## Reshape

business processes

## Bend the curve

on innovation

# Business Expert Empowerment



**Chris Ullmann**

Executive Director, AI Transformation



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- Customer and partner agents
- Agents serving external stakeholders

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# External Engagement



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## Reshape

business processes

### Workplace & IT Services

- Run internal services
- Self-service IT and workplace operations

### Core Business Processes

- Transform workflows
- Agents woven into business-critical flows

## Bend the curve

on innovation

These are design choices, not stages. Most organizations run 2–3 simultaneously.

# Workplace & IT Services

**KANTAR**

**John Dicken**

Senior Director, AI People Solutions



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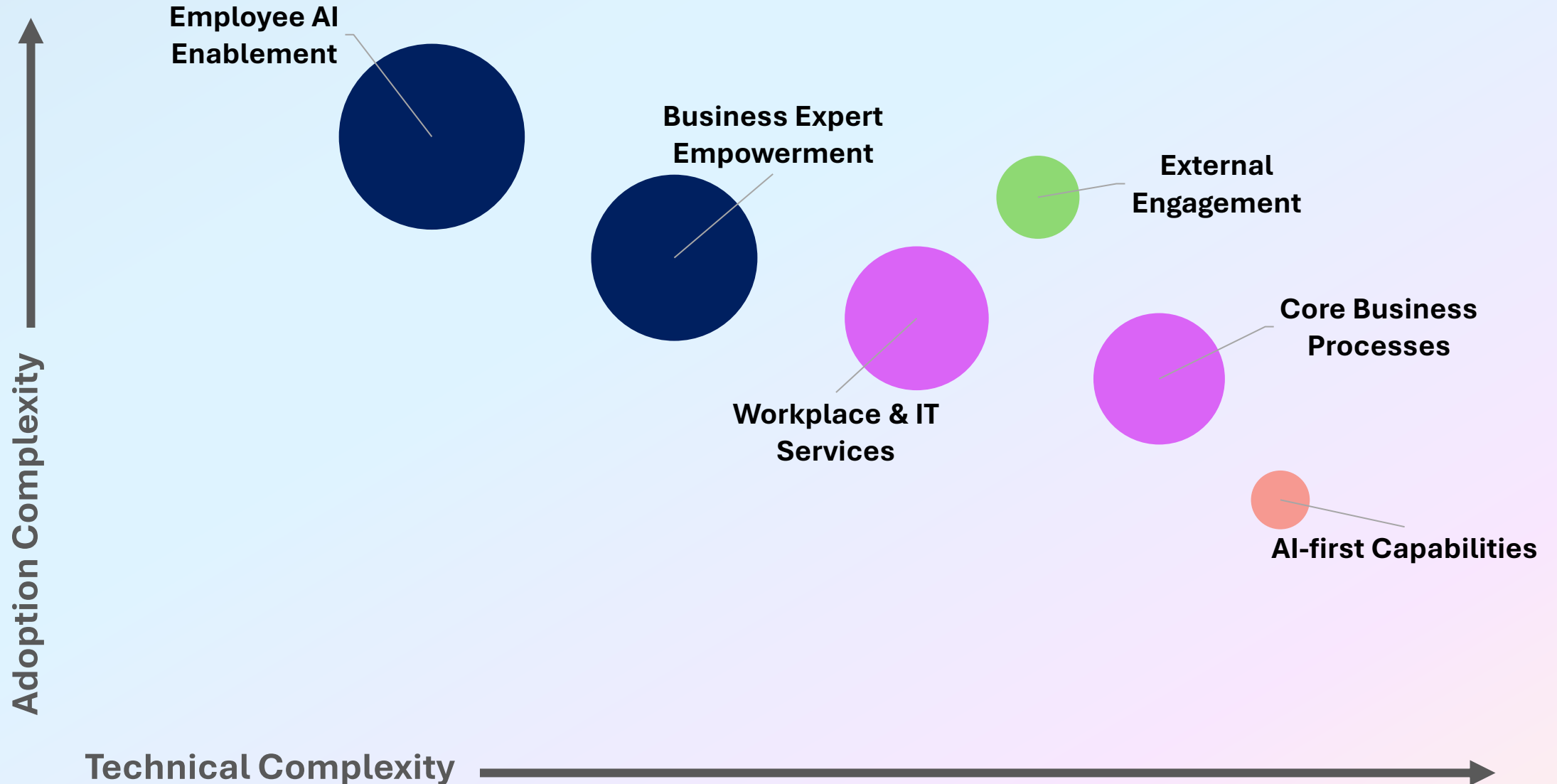
on innovation

### AI-first Business Capabilities

- Net new capabilities
- Things that weren't possible before AI

These are design choices, not stages. Most organizations run 2–3 simultaneously.

# Ease of adoption vs Technical complexity



NEW

# Agentic Transformation Patterns Playbook

The complete playbook for operationalizing AI agents at scale. Covers the six Frontier Transformation Patterns, the Agentic AI Maturity Model, and the Center of Excellence framework — everything we discussed today in one actionable guide.

- ✓ Six adoption patterns with roles, governance, and ownership models
- ✓ Maturity diagnostic to find your scale-breaker
- ✓ CoE design — structure, decision rights, and anti-patterns
- ✓ Risk-tiered governance framework
- ✓ 90-day play to go from pilots to production



**Download the playbook**

Launching today

[aka.ms/AgenticTransformationPatterns](https://aka.ms/AgenticTransformationPatterns)



Scan or visit the link to get your copy

# Agentic AI Maturity Model

*From promising pilots to reliable business impact. The operating capabilities behind scalable agents.*



## AI Strategy & Experiences

---

Where AI fits in your priorities



## Business Strategy

---

How AI connects to business outcomes



## Governance & Security

---

What agents are allowed to do



## Technology & Data

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Whether your foundation supports scale



## Organization & Culture

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Whether people are ready to change

# The maturity model is a diagnostic, not a scorecard

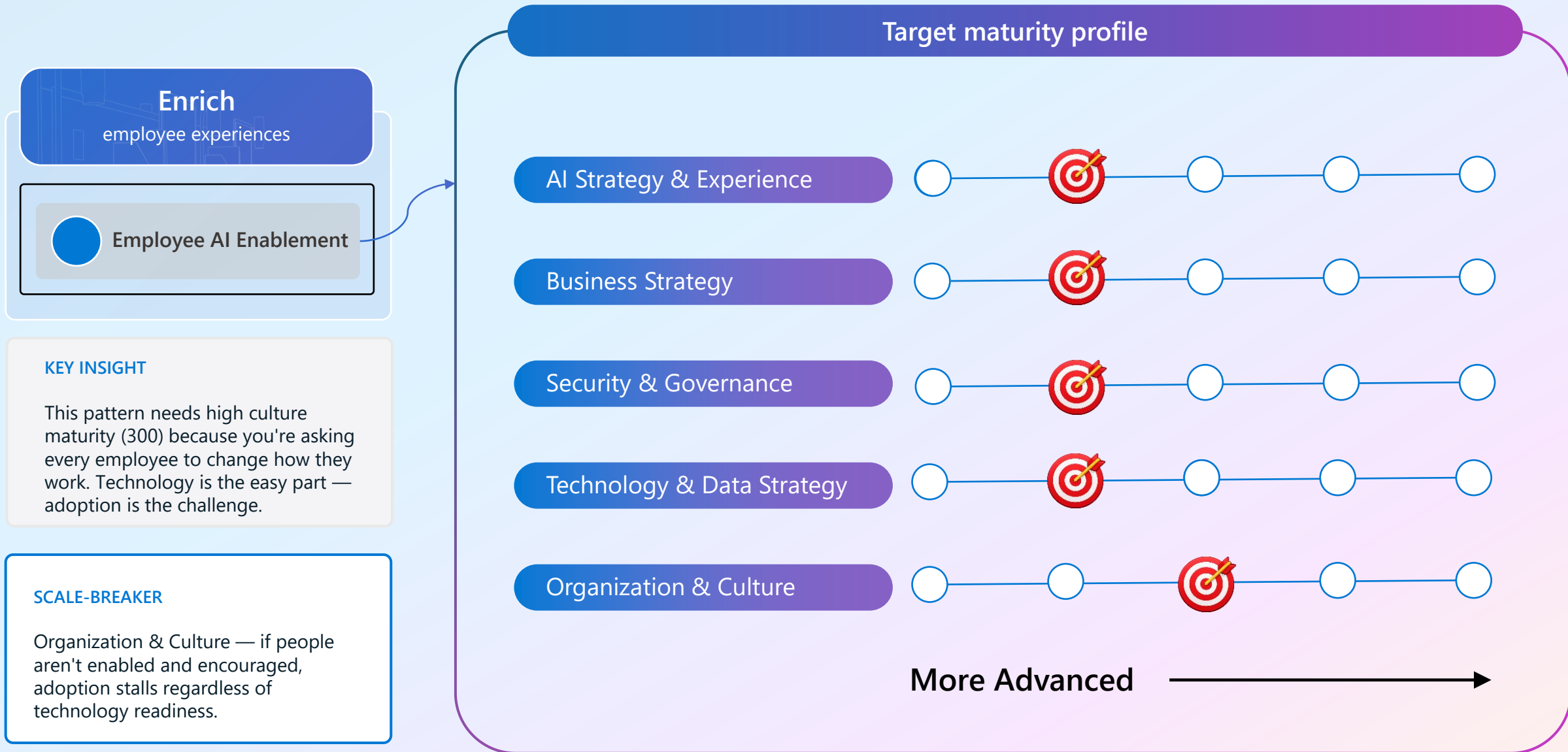
MATURITY LEVEL	AI STRATEGY & EXPERIENCE	BUSINESS STRATEGY	AI GOVERNANCE & SECURITY	TECHNOLOGY & DATA	ORGANIZATION & CULTURE
100 — Initial	No AI/agent strategy or vision	Human-only workflows, siloed and opportunistic	No governance, risks unmanaged	Fragmented tooling, no standards	No training, isolated enthusiasts
200 — Repeatable	Early vision forming, limited alignment	Pilots improve single workflow steps	Early policies, reactive reviews	Basic environment, partial reuse	Sporadic training, community forming
300 — Defined	Formal AI strategy, exec sponsor in place	Human-agent teaming in priority domains	Documented governance model, formal reviews	Standardized architecture, ALM practices	Formal onboarding, active maker community
400 — Capable	AI integrated in enterprise planning	Cross-system orchestration, BU-led transformation	Proactive governance, automated monitoring	Scalable foundations, automated deployments	Champions embedded, broad upskilling
500 — Optimized	AI-first culture, continuous iteration	Adaptive, autonomous processes	Predictive risk mgmt, continuous compliance	Advanced multi-agent, self-improving systems	Self-sustaining community, learning culture

**KEY INSIGHT**

This organization is strong on Governance and Technology (400) — but AI Strategy and Business Strategy are at 200. The **200 is the ceiling**. No amount of technical maturity compensates for a missing strategy.

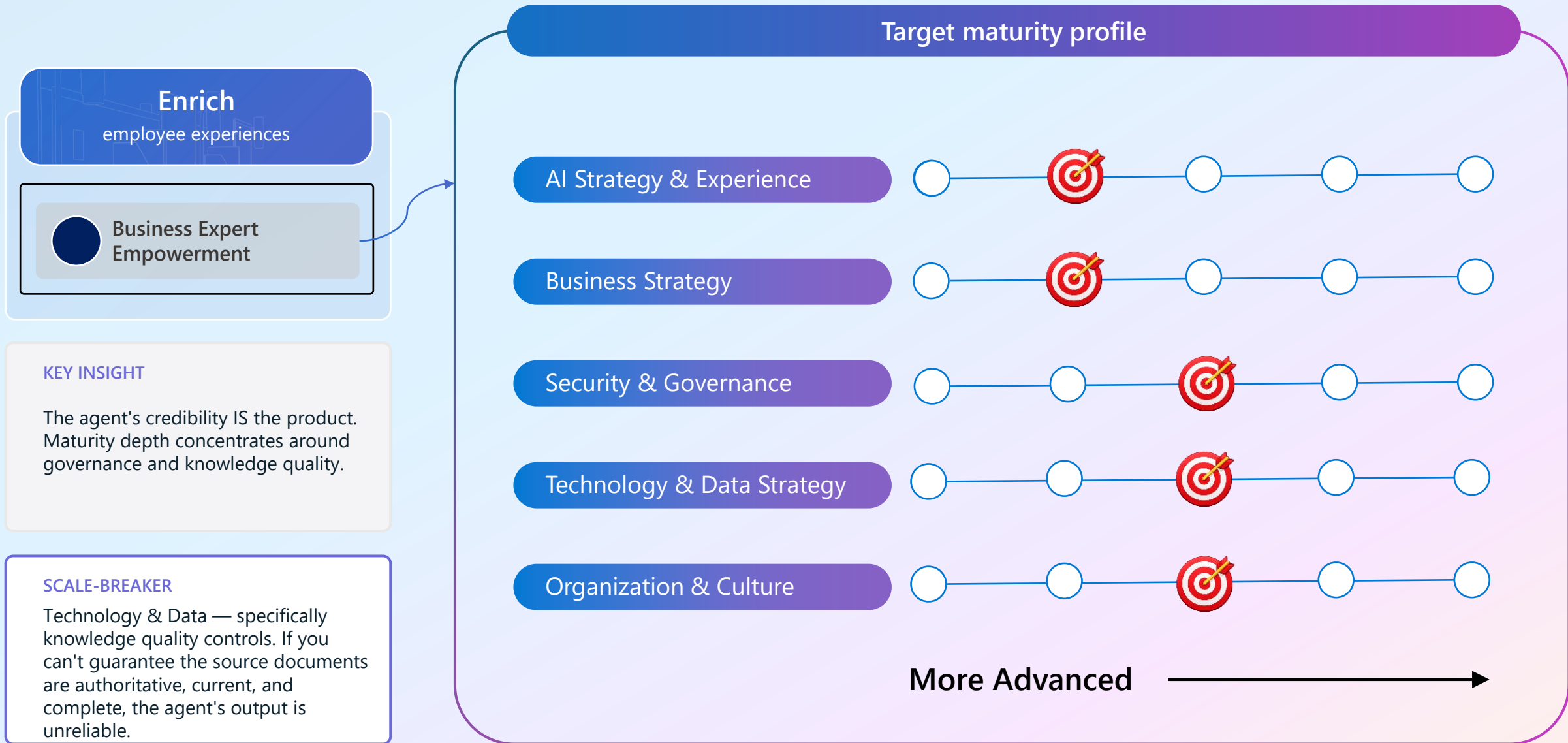
# Employee AI Enablement

Employees use AI agents to research, analyze, draft, and automate personal workflows — while people remain accountable for decisions and outcomes.



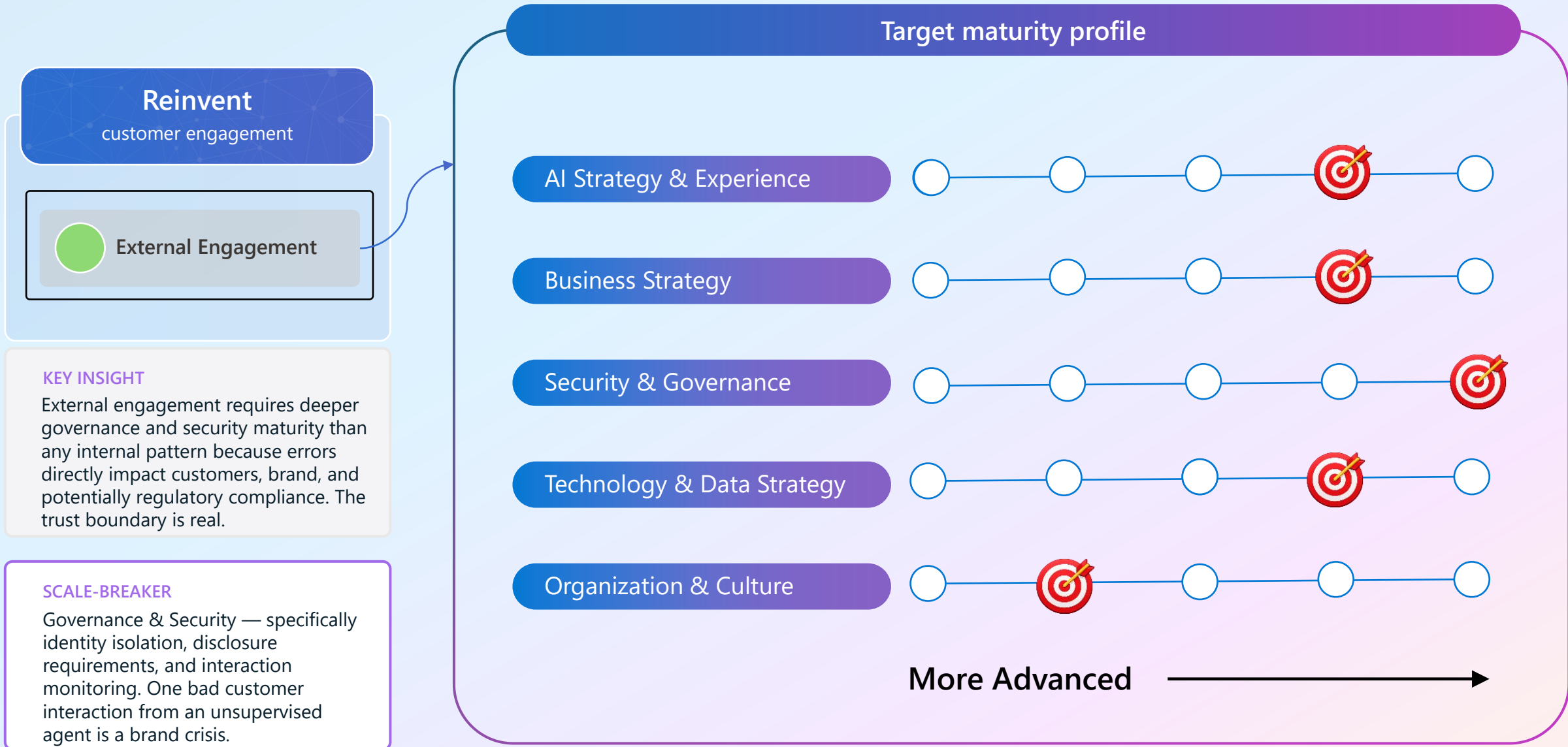
# Business Expert Empowerment

Use AI agents to capture, apply, and scale expert knowledge across the organization — without automating decisions or removing human judgment.



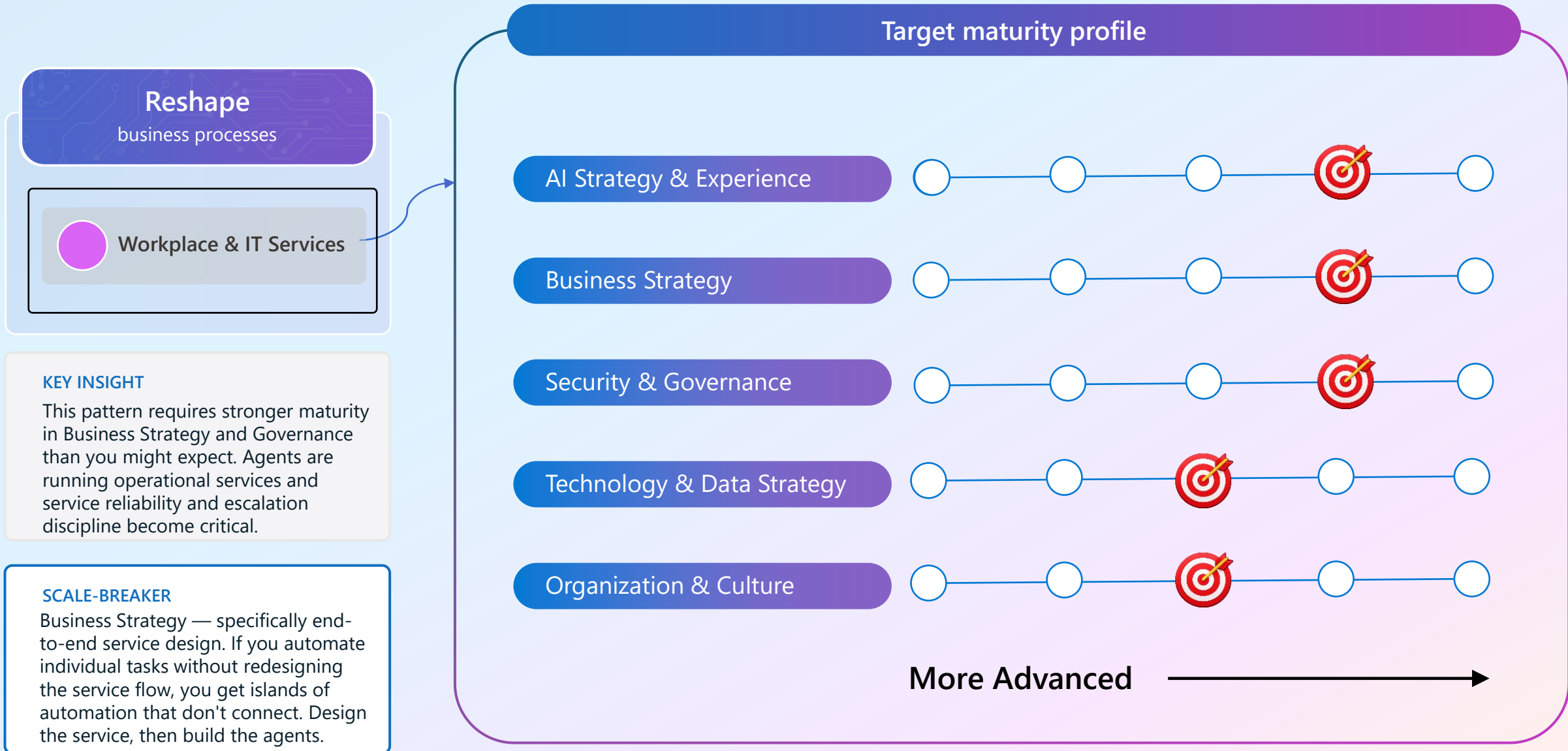
# External Engagement

Use AI agents to engage customers, partners, and ecosystems directly — delivering differentiated experiences at scale while maintaining trust, control, and accountability.



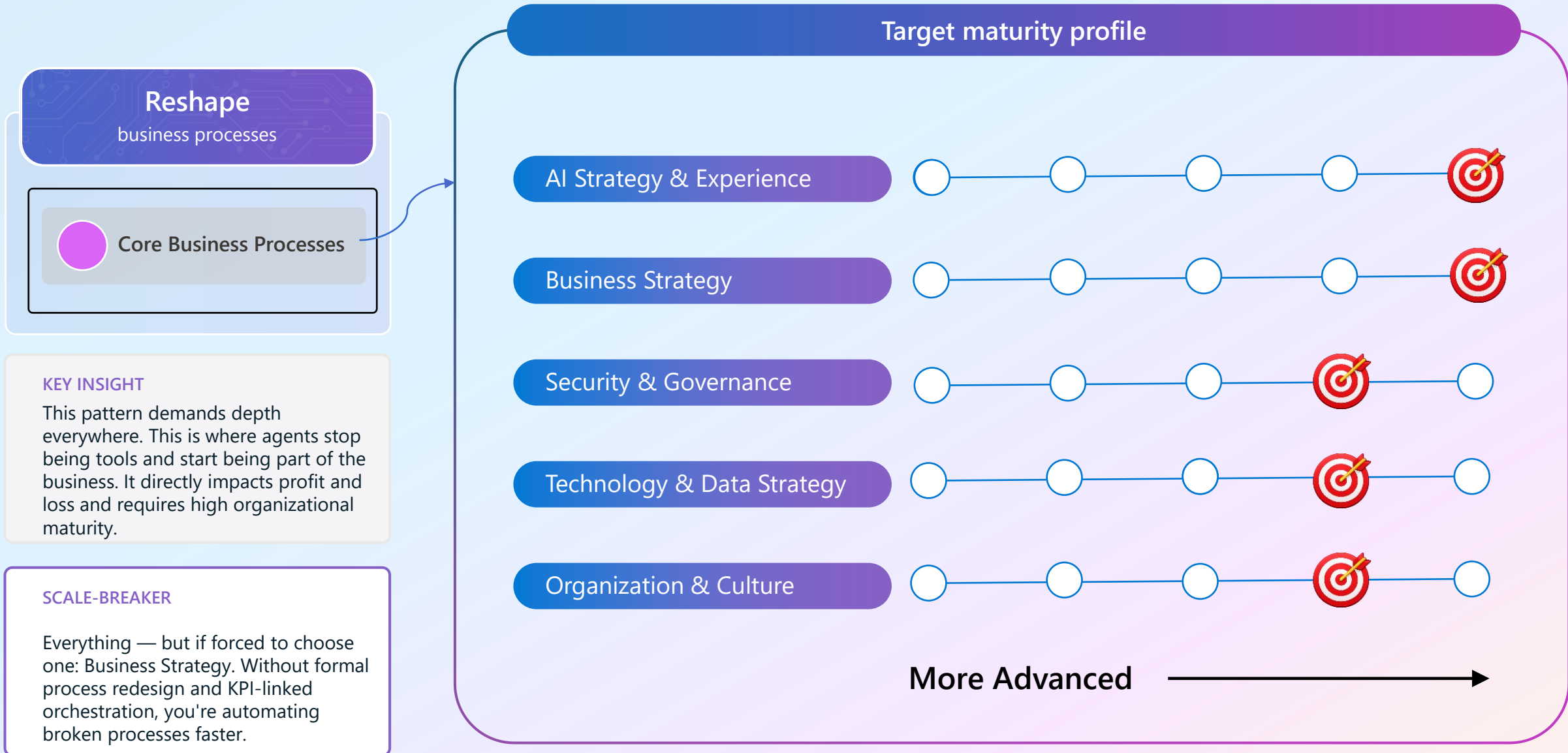
# Workplace & IT Services

Use AI agents to operate core workplace and IT services end-to-end, improving reliability, speed, and employee experience



# Core Business Process Transformation


Use AI agents to run end-to-end core business processes across the enterprise, delivering step-change improvements in speed, quality, and resilience



# AI-first Business Capabilities

Create entirely new business capabilities by designing AI agents as core building blocks — not add-ons to existing processes.

**Bend the curve**  
on innovation

 AI-first Business Capabilities

## KEY INSIGHT

There's no existing process to compare against, no baseline to measure improvement from, and no incumbent workflow to guide design. Everything must be built — including how you measure success.

## SCALE-BREAKER

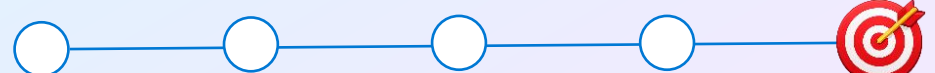
Technology & Data — specifically multi-agent orchestration, real-time telemetry, and learning infrastructure. Without a robust technical foundation, autonomous capabilities become unpredictable.

Target maturity profile

AI Strategy & Experience



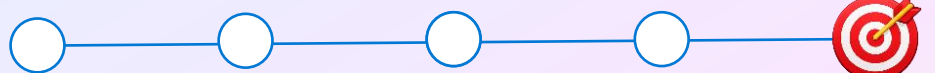
Business Strategy



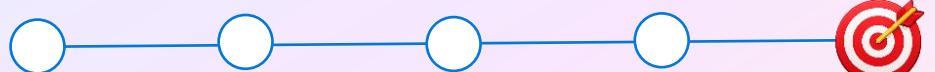
Security & Governance



Technology & Data Strategy



Organization & Culture



More Advanced 

# Business Expert Empowerment

Finance SMEs get the same questions every day – ‘Which policy applies?’, ‘What’s the right code?’ An agent trained on institutional knowledge handles routine queries, escalating edge cases to humans.

Download Report




See your own assessment  
<https://aka.ms/adoptionpulse>

Assign clear ownership and accountability for each deployed agent

Implement basic logging, usage tracking, and feedback channels

# Center of Excellence

# The typical approach

- 
- An illustration of an iceberg. The tip of the iceberg, which is above the water line, is light blue and white. The much larger part of the iceberg, which is below the water line, is a darker blue. A horizontal line represents the water surface, separating the visible tip from the hidden base.
- ✓ 12 agents built
  - ✓ Great user feedback
  - ✓ Executive sponsorship

## What you share with your leadership team

### What nobody talks about

- ✗ 3 have no owner
- ✗ No monitoring on any
- ✗ 2 are returning stale data
- ✗ 1 auto-approved something it shouldn't have
- ✗ Nobody knows the full inventory

**It's a Tuesday. Nobody's watching.**

---

**Agents don't scale  
through technology.**

**They scale through people,  
ownership, and  
operating discipline.**

You don't need a bigger model.  
You need a better operating model.

# Center of Excellence



# EISNERAMPER



**Dave O'Brien**

Senior Manager, AI and Data Governance

# The Frontier Center of Excellence (CoE)

The missing operating system for scaling agents



An Agentic CoE turns strategy and intent into repeatable, trusted execution.

# A CoE is not what you think it is

## What you hear

at

- ✗ A committee that meets monthly
- ✗ Approvals that slow you down
- ✗ A silo that hoards control

## What it actually is

- ✓ Guardrails that accelerate teams
- ✓ Golden paths that make speed safe
- ✓ A lifecycle engine the whole org uses

# Your 90-day play

From pilots to production — start Monday

## Days 0–30

WHAT & WHERE

Foundation

- Pick 1–2 adoption patterns
- Name an owner for each
- Run the maturity diagnostic
- Find your top scale-breaker

## Days 30–60

BUILD & GUARD

Stand Up

- Define minimum governance guardrails
- Stand up CoE rhythm
- Deliver 1–2 agents to production
- Start monitoring from day one

## Days 60–90

RUN & DECIDE

Scale

- Treat agents as production services
- Measure outcomes — not just usage
- Report value to leadership
- Decide what scales next

**You don't need a bigger model.**

**You need a better operating model.**

# Resources

Continue your journey with these tools and assets

## Agentic AI Maturity Model

Self-assess your organization across five capability drivers. Use the detailed descriptors in this playbook to place yourself on each level.

[aka.ms/AgentMaturityModel](https://aka.ms/AgentMaturityModel)

## Agent Transformation Stories

Real customer stories. Real agent impact. Discover how organizations across industries are transforming their business with agents and find inspiration for your own AI journey.

[aka.ms/CopilotAgentStories](https://aka.ms/CopilotAgentStories)

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## Microsoft Copilot Acceleration Team

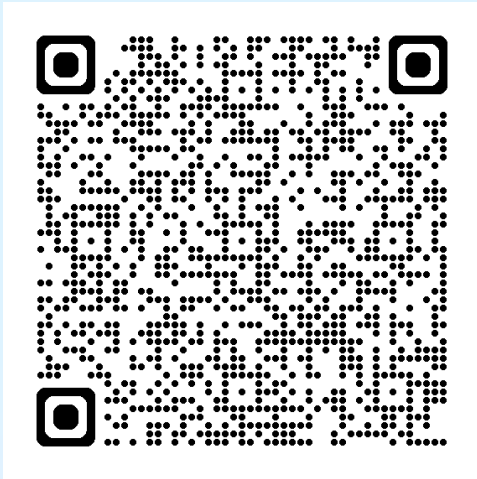
Other resources from the Copilot Acceleration Team (CAT), part of the Copilot Studio engineering team at Microsoft. Our mission is to accelerate the adoption and success of Microsoft 365 Copilot and Copilot Studio.

[aka.ms/WeAreCAT](https://aka.ms/WeAreCAT)


# Share your AI story

We ❤️ highlighting your success:

- Conferences, webinars
- Written stories and videos




[aka.ms/ShareYourSuccessStory](https://aka.ms/ShareYourSuccessStory)



**Agent transformation stories**

Microsoft 365 Copilot, Microsoft Copilot Studio, Dynamics 365, Power Platform, and Agent 365.







Real customer stories. Real agent impact. Discover how organizations across industries are transforming their business with agents and find inspiration for your own AI journey.



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 <p><a href="#">NFP Scales Risk Management with AI</a></p>	 <p><a href="#">Pioneering the Future of Home Transformation Through AI Excellence</a></p>	 <p><a href="#">Singapore Civil Defence Force implements digital solutions using Power Platform and Copilot Studio</a></p>
 <p><a href="#">The Estée Lauder Companies and Microsoft Copilot Studio transform intelligence</a></p>	 <p><a href="#">Amgen builds agent in 6 weeks with Copilot Studio to help accelerate R&amp;D   Microsoft Customer Stories</a></p>	 <p><a href="#">UNSW use Microsoft Copilot Studio to transform the student experience</a></p>

Discover stories at: <https://aka.ms/AgentStories>

**Q&A**

# Whova

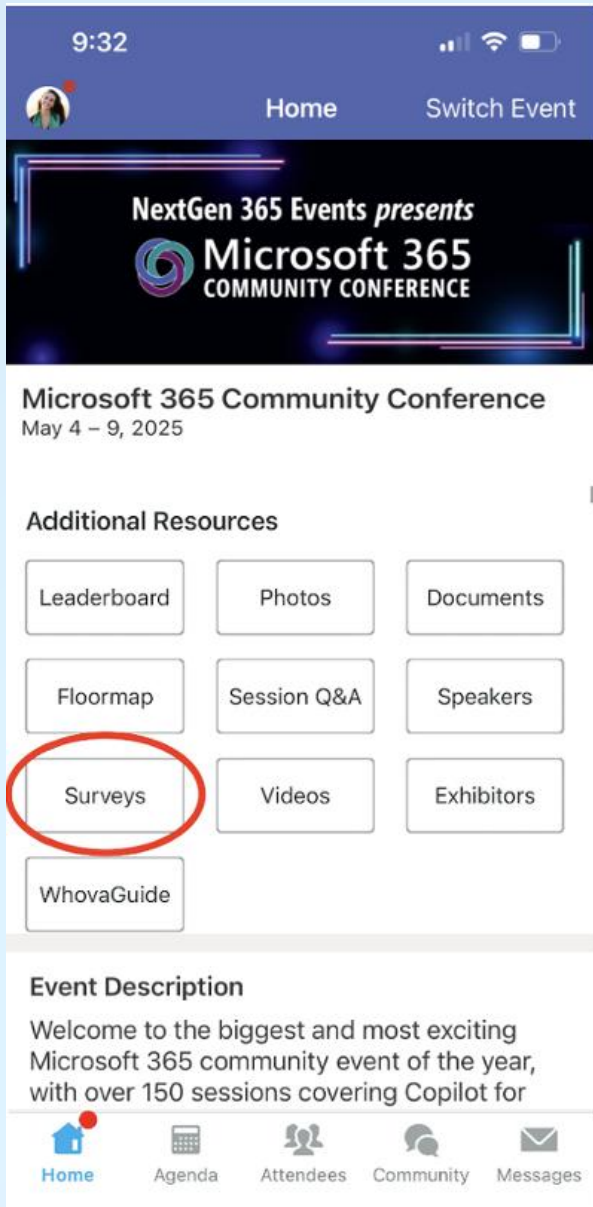


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- Click Session Feedback.
- Scroll down to find this session title.
- Complete the session feedback survey.
- Finally, click 'Submit'.

It's just that easy!

**We have an  
exciting future ahead.**

---

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Technical expertise via  
our FastTrack partners

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### Microsoft 365 Copilot

Deliver value and employee satisfaction with our tools for Microsoft 365 Copilot deployment and adoption. This powerful technology combines the power of large language models (LLMs) with your organization's data – all in the flow of work – to turn your words into one of the most powerful productivity tools on the planet.

Microsoft 365 Copilot Chat and in-app experiences provide real-time intelligent assistance, enabling users to enhance their creativity, productivity, and skills.

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#### Copilot Success Kit

Our Success Kit empowers you to achieve rapid value with Copilot while enabling your progressive skilling journey with AI tools.

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#### Copilot Chat and agent starter kit

This new kit includes guidance on IT controls, setup, and resources to help prepare your tenant and enable your users to create and use agents.

[Explore the kit >](#)

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The Microsoft 365 Copilot community is your hub for the official blog, latest news, and discussions.

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