



## The transformative power of Agents

# From HR to sales, finance to R&D, AI agents can transform how your team's work

Think of AI agents as apps for businesses that use AI. Agents can be off the shelf or tailor-made to automate a wide variety of complex tasks. At their most effective, agents can help you to eliminate data silos, quickly extract insights from large volumes of organizational data, interact with third-party applications and accelerate routine tasks so people can focus more time and energy on valuable work.

Using Microsoft 365 Copilot and Copilot Studio to create agents for specific tasks, departments, or functions, you can transform how your teams operate across almost every area of business.

### Finance

If your business is in financial services, you can integrate agents into your fraud detection tools to enhance safety for your customers. These agents can monitor account activity based on individual customer parameters and automatically send personalized notifications to customers when they spot signs of potential fraud. You can also create agents to identify financial risks, scan for errors, flag different kinds of transactions to comply with regulations and provide around-the-clock support services for banking customers.

### Human resources

Your HR team can streamline processes and even incorporate agents as virtual team members, using them to manage the initial screening of CVs or write job descriptions. You can also improve the new hire experience by creating onboarding agents that respond to natural-language queries to help people find answers to questions about company policies and workplace practices. Or deploy agents to support training for customer service employees – for example, they can autonomously coach employees through role-playing exercises by responding as different customer personas. Other agents can help to resolve employee problems with pay issues, automatically process and approve requests for time off, or verify compliance matters for the HR team.



## Research and development

Whether you work in pharmaceuticals or consumer goods manufacturing, IT services or sports and leisure, your R&D teams can deploy agents to better understand your customers' product and service demands, identify potential new market opportunities, and accelerate innovation. For example, your beauty business might create an agent to analyze trends across your own sales data as well as across customer feedback, social media, industry reports and more. Using those insights, your R&D team can zero in on the new products and services that customers are likely to want most. And if you're in healthcare, you can quickly launch agents to scour the latest academic research for findings that are relevant to your product line or that identify potential new markets.

## Sales

Agents can help your sales team close deals faster while also freeing them to spend more time with customers and less time on research, lead identification, meeting preparation, and other labor-intensive tasks. By automatically drawing insights from CRM data, emails, past sales materials and online market trends and developments, AI agents can quickly arm your sales professionals with the information they need. For instance, they can query agents to learn more about what a key customer's biggest business concerns are, which pending deals have the greatest risks and what kinds of products a customer entering new markets is most likely to need. You can also create multiple agents that work together to retrieve data from both internal and online data sources to produce highly specific, up-to-date and targeted sales proposals for individual prospects.

## Supply chain

You can deploy agents to help your organization manage complex global supply chains with automated support for sorting and tracking supplier quotes, analyzing supplier invoices for billing errors or monitoring emails and other notifications to confirm orders and deliveries. These solutions can even be integrated into public-facing chatbots so your customers can automatically follow their shipments in real time. Agents can also keep track of weather forecasts and reroute shipments or send alerts in near-real time to notify truck drivers, ships, and air deliveries about potential risks.

As your business keeps growing in AI maturity, and as agentic AI technologies become increasingly powerful, you'll find even more potential benefits in the months and years to come. By embracing the power of agents today, you'll be building a stronger foundation for your future competitiveness.



**Want to learn more about how Microsoft 365 Copilot agents can help to increase productivity, enhance customer experience and empower your users? Get in touch with us today to discuss the possibilities or arrange an [envisioning workshop](#).**

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