Building your AI Business Case

Charting the Path to Value

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Brian Haydin

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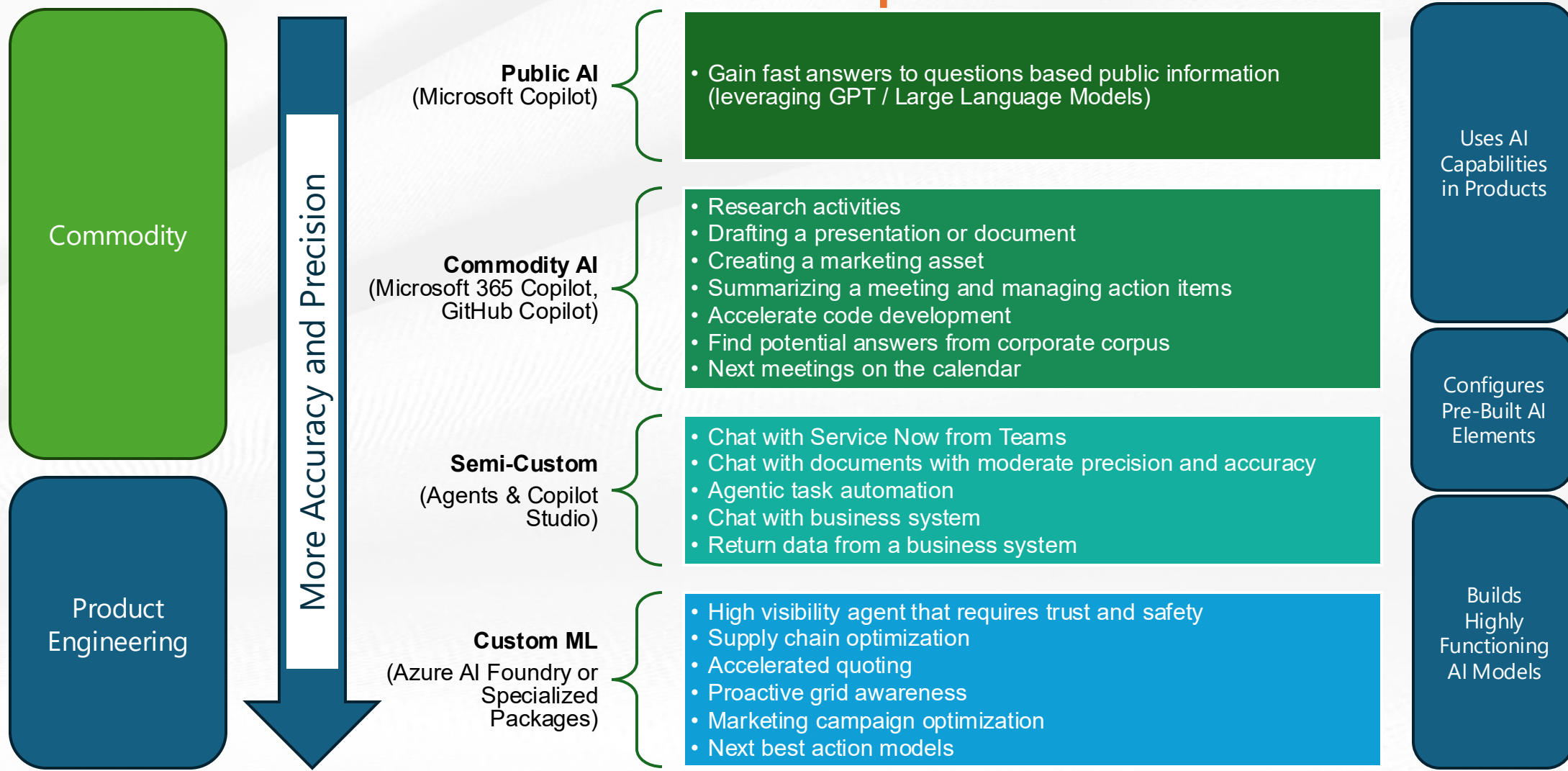# Domains of Impact to Consider

Commodity

(creating impact from AI products, such as M365 Copilot or Copilot Studio)

Product Engineering

(creating direct ROI from data-enabled journeys with direct payoff)

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Places for AI and Example Use Cases

More Accuracy and Precision

Commodity

Product Engineering

Public AI
(Microsoft Copilot)

- Gain fast answers to questions based public information (leveraging GPT / Large Language Models)

Commodity AI
(Microsoft 365 Copilot, GitHub Copilot)

- Research activities
- Drafting a presentation or document
- Creating a marketing asset
- Summarizing a meeting and managing action items
- Accelerate code development
- Find potential answers from corporate corpus
- Next meetings on the calendar

Semi-Custom
(Agents & Copilot Studio)

- Chat with Service Now from Teams
- Chat with documents with moderate precision and accuracy
- Agentic task automation
- Chat with business system
- Return data from a business system

Custom ML
(Azure AI Foundry or Specialized Packages)

- High visibility agent that requires trust and safety
- Supply chain optimization
- Accelerated quoting
- Proactive grid awareness
- Marketing campaign optimization
- Next best action models

Uses AI Capabilities in Products

Configures Pre-Built AI Elements

Builds Highly Functioning AI Models

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Unprecedented Momentum

Current and Planned Use of GenAI, 2023 versus 2024
(Percentage of respondents)

55%

75%

2023

2024
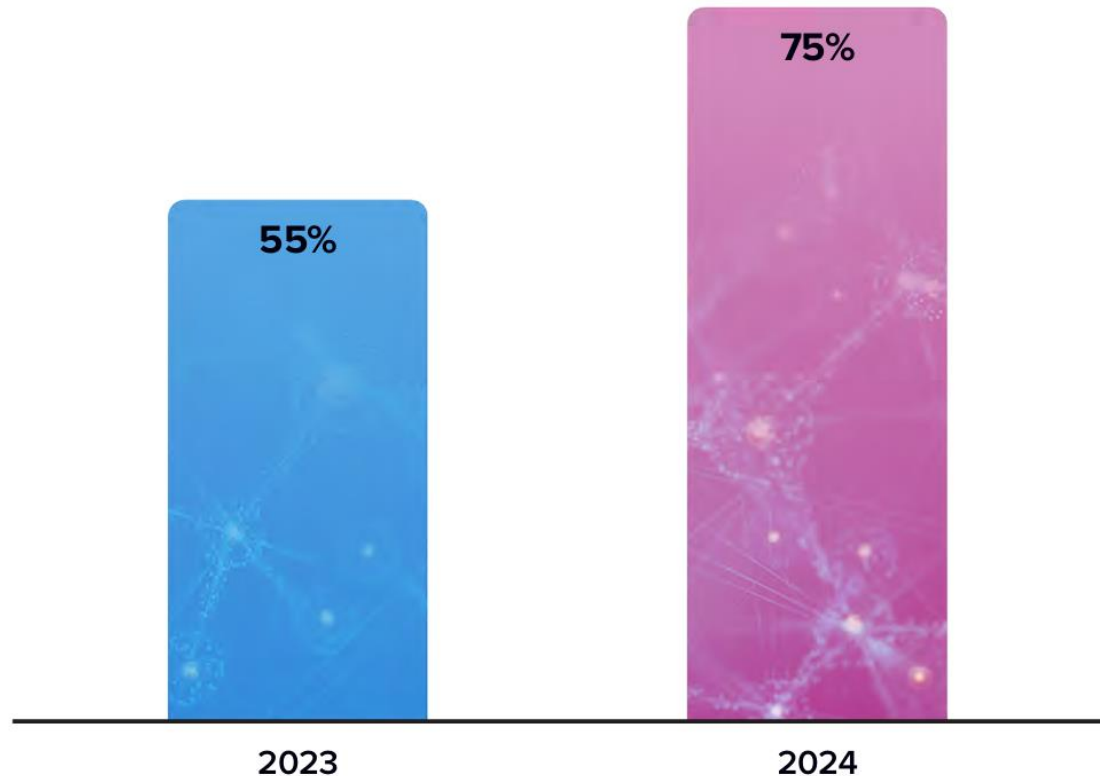
Companies are achieving on average $3.70 in returns for every $1 invested

Top performers (the top 5%) even seeing $10 to $1

The message is clear:

AI is delivering real value at scale

and we're just getting started!

High-performing organizations are extracting **4× more value** from AI than those in early stages and executing projects far faster.

AI is Strategic Imperative

"Top performing companies will move from chasing AI use cases to using AI to fulfill business strategy."

Dan Priest
PwC US Chief AI Officer

"AI is the defining technology of our times. It's augmenting human ingenuity and helping us solve some of society's most pressing challenge."
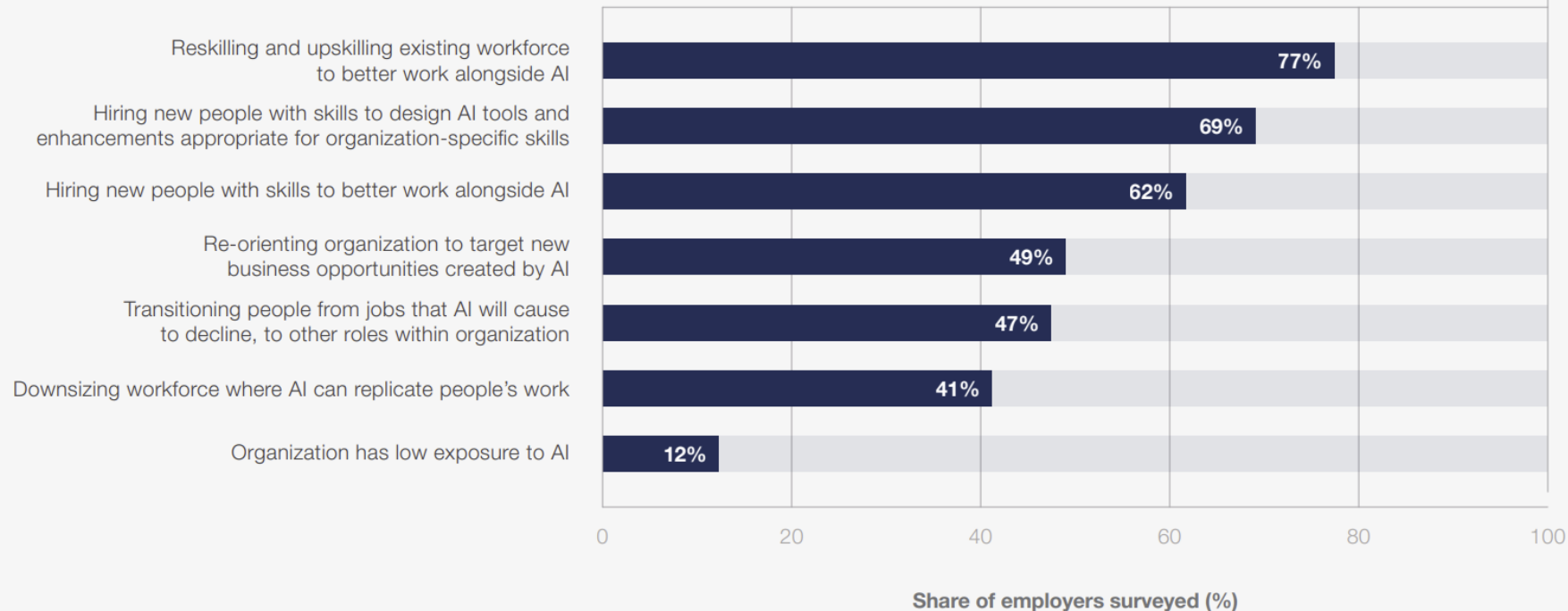
Satya Nadella
CEO of Microsoft

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World Economic Forum Jobs Report

FIGURE 4.14 | **Workforce strategy in response to AI, 2025-2030**

Share of employers surveyed planning to implement the stated strategy in response to AI's increasing capability and prevalence.

Strategy	Share
Reskilling and upskilling existing workforce to better work alongside AI	77%
Hiring new people with skills to design AI tools and enhancements appropriate for organization-specific skills	69%
Hiring new people with skills to better work alongside AI	62%
Re-orienting organization to target new business opportunities created by AI	49%
Transitioning people from jobs that AI will cause to decline, to other roles within organization	47%
Downsizing workforce where AI can replicate people's work	41%
Organization has low exposure to AI	12%

Share of employers surveyed (%)

Source
World Economic Forum, Future of Jobs Survey 2024.

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Exhibit 9

Organizations are increasingly using AI in multiple functions.

Business functions at respondents' organizations that are using AI,[1] % of respondents

● 2021 ●— 2022 ●— 2023 ●— First half of 2024 ●— Second half of 2024
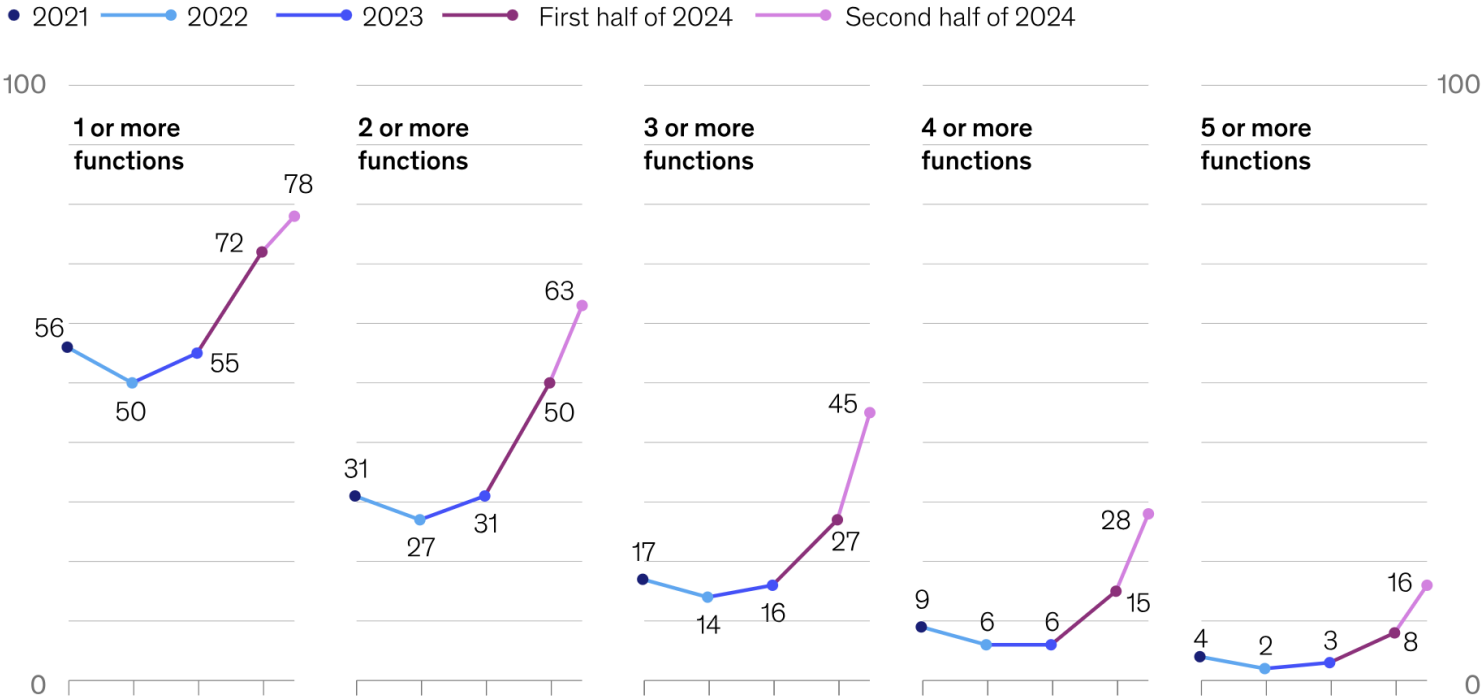
[1] In 2021, n = 1,843; in 2022, n = 1,492; in 2023, n = 1,684; in Feb–Mar 2024, n = 1,363; in July 2024, n = 1,491. The survey question asks about 11 functions: HR; IT; manufacturing; marketing and sales; product and/or service development; risk, legal, and compliance; service operations; software engineering; strategy and corporate finance; supply chain/inventory management; and other corporate functions (eg, knowledge management).
Source: McKinsey Global Surveys on the state of AI, 2021–24

McKinsey & Company

AI Use for Job Functions

Leveraging Gen AI across at minimum 1 job function is already well over the majority

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Opportunities & Responsibilities

With great power comes great responsibility

- efficiency gains

- new business models

- transformed customer experiences

- fairness

- security

- compliance

"Broad social acceptance for AI will depend on ensuring that AI creates new opportunities for workers, respects enduring values, and addresses its impact on resources,"
Brad Smith
Microsoft Vice Chair and President

The Vision

Empower you to lead your organizations up this mountain safely and ambitiously, ensuring quick wins along the way and a durable strategy for the long haul.

- Critical Areas to Focus on:
- People, processes, and culture
- Business and technology modernization
- Security
- Governance and Responsible AI

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Start with Business Pain Points & Goals

- Ground your AI initiatives in concrete business needs.

- Ask *"Where are we trying to go as a business, and what obstacles can AI help overcome?"*

- **Top** use cases often target
  - Increased customer satisfaction
  - Efficiency gains
  - Revenue growth
  - Risk reduction

Purchase Order Matching

Automating Quoting

- Requests come in through email for various parts

- Sales rep previously would search, validate SKU, availability, and create quote

- Automation saves hours per quote by finding part, validating availability, and creating quote

Organizing Strategy and Opportunity Mapping

#1. Strategy and Opportunity Mapping

- **Actions**
  - Executive Envisioning
  - Ideation and Mapping
  - Strategy and CoE

- **Best For**
  - Don't know the WHY or the WHAT
  - Just getting started
  - Need to align business and tech

Case Study – Fox World Travel

Provided organization-wide brainstorming and engagement that lead to the creation of "Colby", a multi-function customer-facing agent that interacts with the core travel management business system

Workshop #1
CoE Kickoff and Strategic Team

- Executive Leadership Message
- State of the State
- State of AI in the Industry
- Examples of Value from Similar Businesses
- Action to Form Functional Team(s)
- Homework Assigned to Teams (offline)

Workshop #2
Brainstorming for Each Functional Domain*

- Establish alignment goal to be achieved
- Each attendee brings value creation opportunities
- Context of value creation is around possible futures
- Capture of ideas and building of idea registry
- Rough prioritization of ideas from each session

Deep Dive Workshops #3

- Deep dive into each prioritized idea
- Includes Solution Architect from Concurrency

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Example Output from Envisioning Session

Category	Idea	Notes	Impact	Lane	Value	Effort	Calc
Operations	Meeting Summarization	Clear benefit on optimizing meeting outcomes	Take action from meetings, summarization, etc.	Copilot	3	1	3
Engineering	Meeting transcription & summaries	Creates a record while allowing focus on participation	Focus on output from meetings	Copilot	3	1	3
Manufacturing	Meeting Summarization	Clear benefit on optimizing meeting outcomes	Record and take actions on meetings	Copilot	3	1	3
Sales and Quoting	Meeting Summarization and follow up actions	Clear benefit on optimizing meeting outcomes	Enable all sales people with meeting summarization and actions	Copilot	3	1	3
Customer Service	Meeting Summarization	Clear benefit on optimizing meeting outcomes	Meeting summarization	Copilot	3	1	3
Customer Service	Tech and Customer Service Agent	Reduce phone calls and talk times with internal use. Current team could increase bandwidth for other sales/service related tasks.	Can we drive excellent customer service?	Copilot Studio	4	2	2
Human Resources	HR Chat function	Consistent and efficient benefit question answering	Easy answers to HR questions and ramping new employees in the HR team, maintaining reliable body of knowledge	Copilot Studio	4	2	2
Human Resources	Creating forms and letters for various tasks	Consistent and efficient forms distribution for benefits and term packets	Automate forms and letters to distribute information as necessary	Copilot Studio	4	2	2
Sales and Quoting	Sales data analytics by product	Understanding trends and areas not easily seen - call to action	Create sales action plan based on framework	AI Analytics	4	2	2
Sales and Quoting	Sales data analytics by customer	Helping to understand unseen opportunities/chainging the game with our customers	Create sales action plan based on framework	AI Analytics	4	2	2
Sales and Quoting	Sales data analytics by buying group	Seeing the bigger picture	Create sales action plan based on framework	AI Analytics	4	2	2
Sales and Quoting	Contract Review	Saving time on contract review	Automate contract review	Copilot Studio	4	2	2
Human Resources	HR Internal Agent	Quickly answer HR related question based on all our plan/policy documents.		Copilot Studio	4	2	2
Human Resources	Policy, JD,and job posting Creation	Consistent and Efficient creation of these documents	Accelerate HR job posting activities	Copilot	2	1	2
Sales and Quoting	Creating effective presentations	Saving time, making our presentations more impactful	Accelerate presentation creation	Copilot	2	1	2
Demand and Inventory	Forecasting	Use AI to evaluate historical information and create forecasts for sales and cash. Currently this is a manual exercise for all.	Better understand estimated cash forecast	AI Analytics	5	3	1.666666667

Understanding Types of Implementations
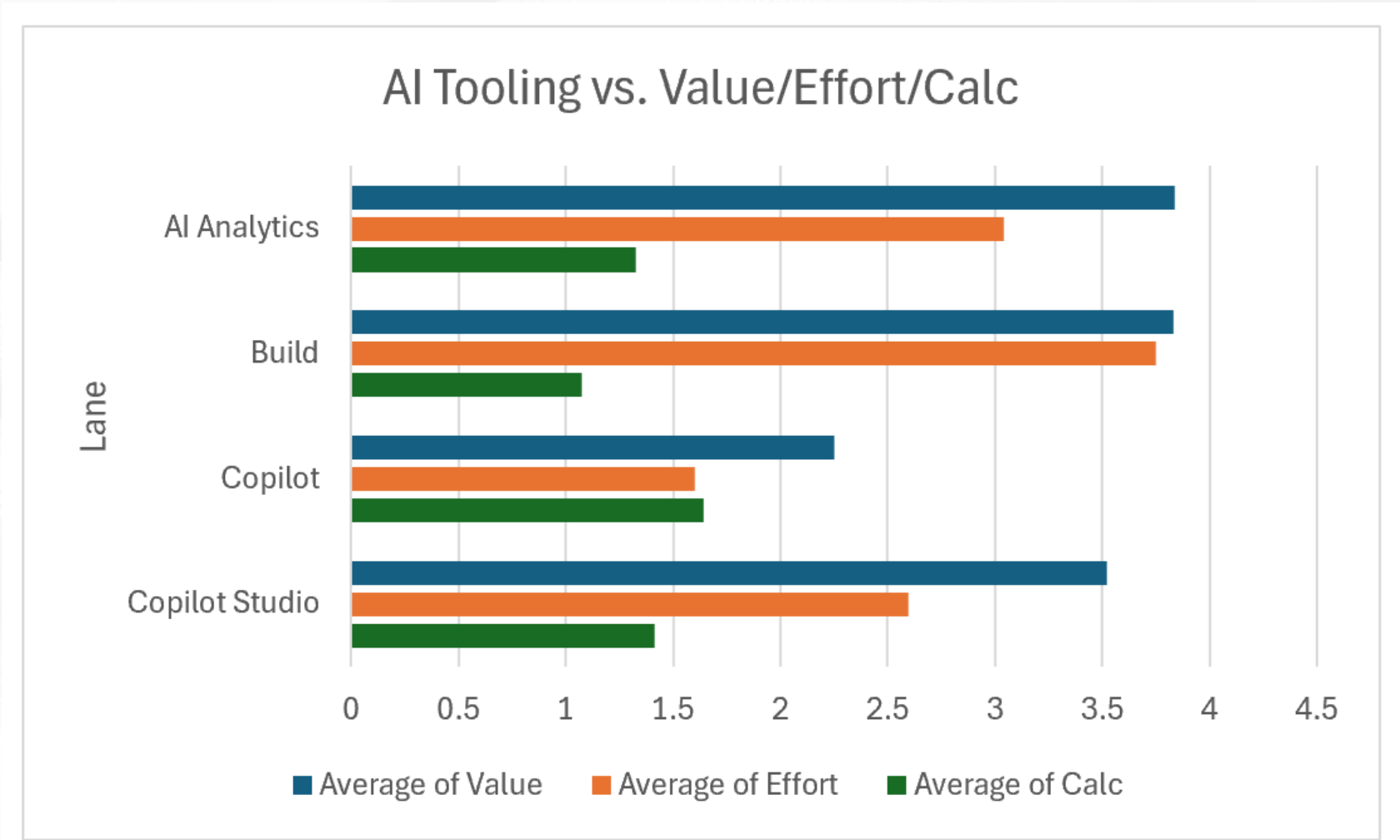
Use a Prioritization Framework

BXT Lens:

- Examine **Business** Value

- e**X**perience
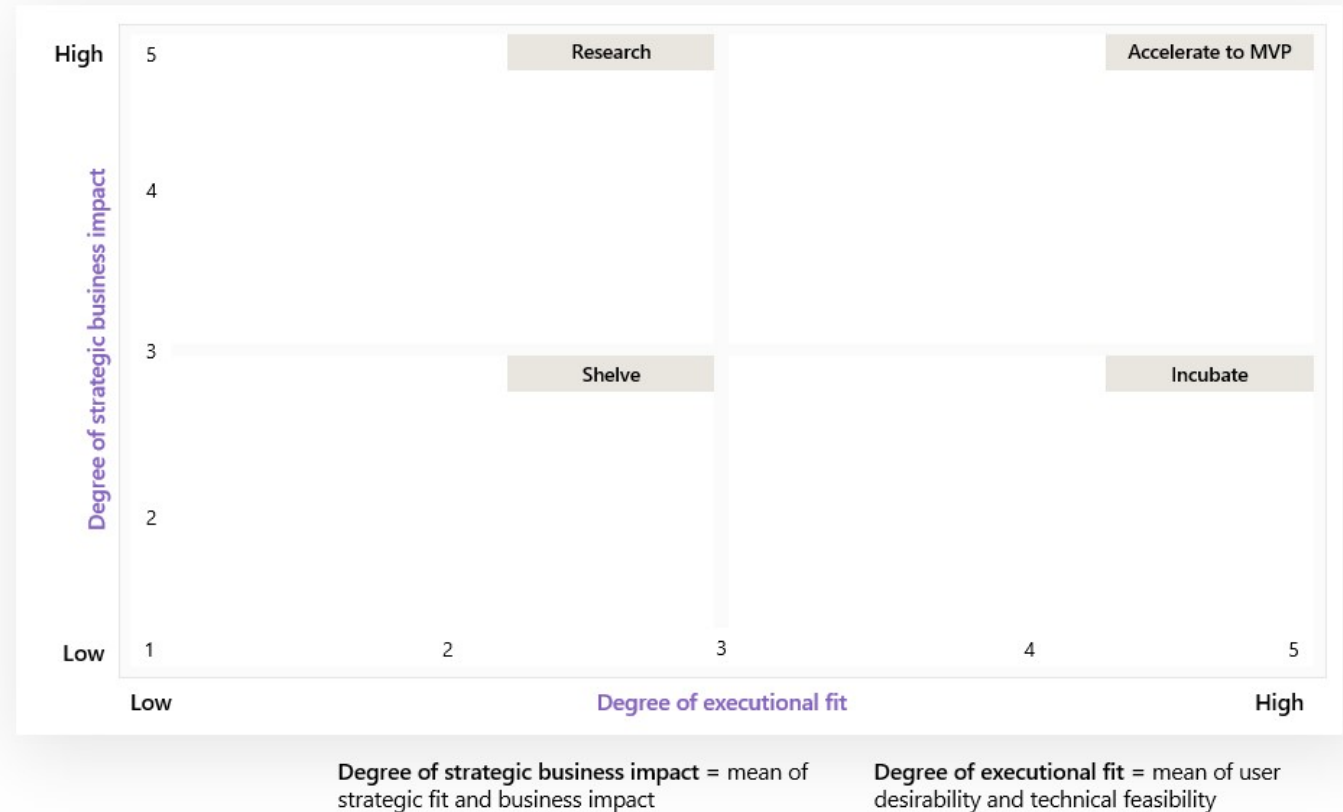
- **Technology** feasibility

Figure: Example AI use-case prioritization matrix (each project mapped by strategic business impact vs. executional fit)

Focus on High-Impact, Feasible Uses

- Select a balanced portfolio of use cases.

- Quick-win projects in the *Accelerate* quadrant can demonstrate value fast.

- Build momentum and support.

- Leading firms will not just chase cool use cases, but ensure AI directly **fulfills business strategy**.

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Example – Prioritization in Action
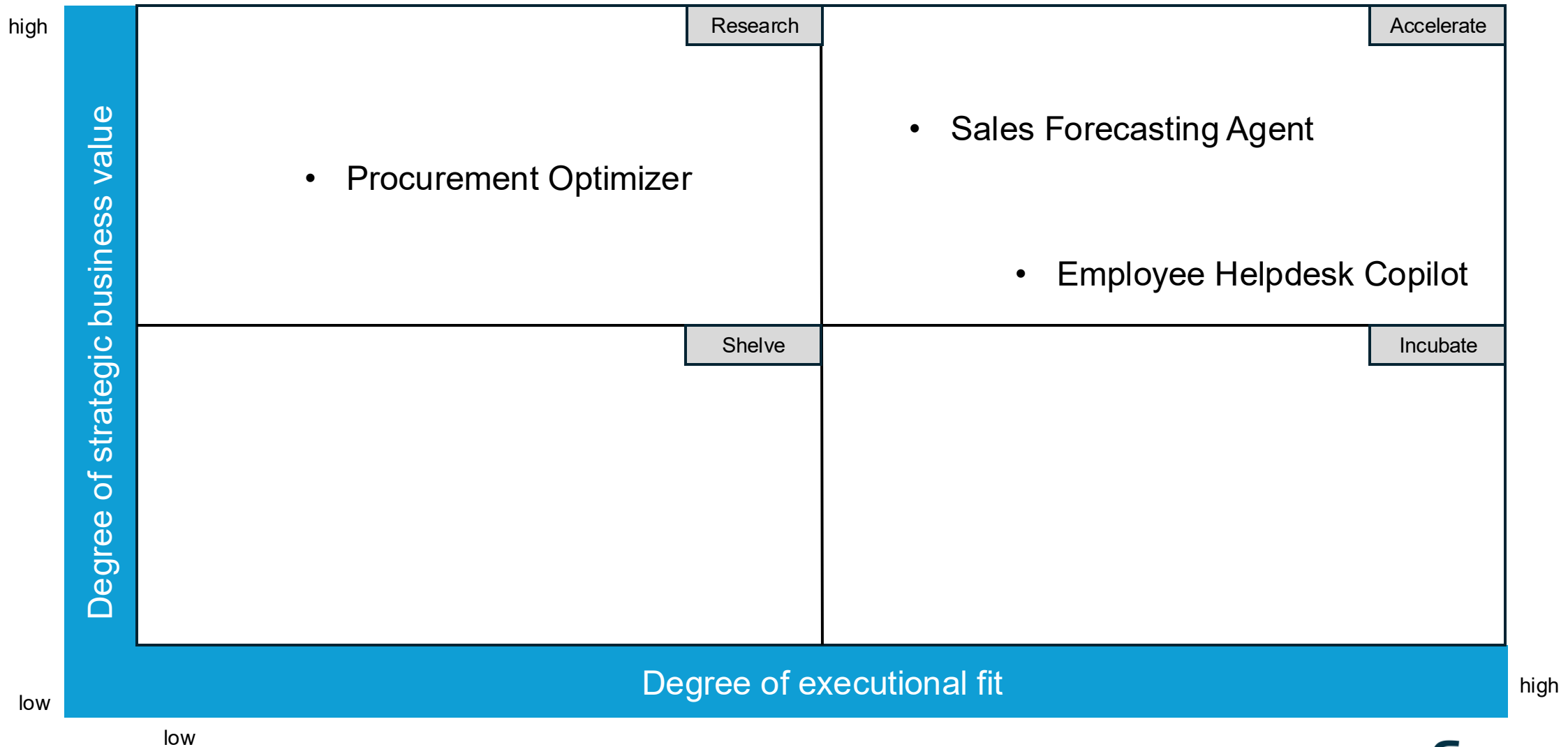
Align with Strategy and Stakeholders

The "Executive Story"

- North Star Hook
- Strategic Context
- Pain Clearly Stated
- Outcome Vision
- Solution Snapshot
- Value Proposition & ROI
- Credibility Proof
- Risk & Governance Guardrails
- Clear Ask & Next Step

Executive Brief: Empowering Data-Driven Heroes with Microsoft Fabric

North Star Hook
Imagine a world where your data isn't a tangled web but a **lightning-fast web** of insights—like a superhero swinging through the city, saving the day with precision. With **Microsoft Fabric**, we're transforming your data strategy into a superpower that drives growth and innovation.

Strategic Context
In today's digital landscape, businesses are drowning in data but starving for **actionable insights**. The rise of AI and multi-agent systems demands a unified data platform that can scale, integrate, and deliver real-time value. Microsoft Fabric, built on Azure's robust ecosystem, positions us to lead this charge, leveraging modular, multi-agent patterns for maximum impact.

Pain Clearly Stated
Your current data systems are like fishing in the Great Lakes with a broken net—**fragmented, slow, and costly**. Siloed data lakes, inconsistent analytics, and manual processes are stunting growth, delaying decisions, and inflating costs. You're missing the big catch: **real-time, AI-driven insights**.

Outcome Vision
Picture your team as a pack of hunters, equipped with the sharpest tools, tracking insights with precision. With Fabric, you'll achieve a **unified data ecosystem**, where every department collaborates seamlessly, AI agents deliver predictive analytics, and decisions are made in real-time—driving **30% faster time-to-insight** and cutting operational costs.

Solution Snapshot
Microsoft Fabric integrates your data into a single, AI-powered platform:

- **Data Integration**: Unify data lakes, warehouses, and analytics with Fabric's OneLake.
- **Multi-Agent AI**: Deploy Semantic Kernel-powered agents for automated insights.
- **Real-Time Analytics**: Leverage Power BI for instant, actionable dashboards.
- **Scalability**: Built on Azure, it scales effortlessly with your growth.

Visual Suggestion: A diagram showing data flowing into OneLake, processed by AI agents, and visualized in Power BI.

Value Proposition & ROI

- **Cost Savings**: Reduce data management costs by **25%** through unified infrastructure.
- **Revenue Growth**: Enable **15% faster product launches** with predictive analytics.
- **Future Impact**: Position your business as an AI-driven leader, ready for the next wave of innovation.
  Trade-Off: Initial migration effort vs. long-term efficiency gains—worth the investment for a **3x ROI** within 18 months.

Credibility Proof

- **Proven Success**: Concurrency has implemented Fabric for 20+ enterprises, delivering **40% faster analytics pipelines**.

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Building the AI Business Case:

Packing for the Expedition

Framework for Calculating ROI for Agentic Apps

1.**Define Objectives and KPIs:** Metrics such as cost savings, revenue increase, productivity gains, customer satisfaction, and error reduction.

2.**Establish a Baseline:** Establish a baseline for the KPIs before implementing the agentic AI app.

3.**Estimate Revenue Gains and Cost Savings:** Analyzing historical data, conducting surveys, and consulting with industry experts.

4.**Identify and Assess Costs:** Includes development costs, data acquisition costs, infrastructure costs, and ongoing maintenance costs.

5.**Determine Intangible Benefits:** Improved decision-making, enhanced brand reputation, and increased employee satisfaction. Difficult to quantify.

6.**Set a Realistic Timeframe:** Consider the time it takes to develop, deploy, and fully integrate the app into the business.

7.**Develop a Current State Scenario:** Goal: Compare the performance of the business with and without the app.

8.**Calculate the ROI:** Calculate the ROI of the agentic AI app using the ROI formula.

9.**Monitor and Adjust:** Adjust the app and its implementation as needed to optimize its effectiveness and maximize ROI.

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Craft a Data-Driven Story

Structure your business case presentation like:

- **Problem/Opportunity** →
  - **Solution (AI use case)** →
    - **Benefits & ROI** →
      - **Investment Required** →
        - **Risk Mitigation** →
          - **Projected Outcomes/Next Steps**

- Example:
  - "Currently it takes 5 days to turn around a customer quote; with an AI-driven system, we target 1 day, which in pilots could win us 15% more deals."

- By painting a picture of achievable value, you make the decision a no-brainer for approvers.

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Quantify Value (ROI) and Cost

Show the math

Example Breakdown

- 22,000 invoices (per annum)
- 15 min / invoice
- 12,000 * .25 = 5,500 hours
- 3,000 hr = 2.75 FTE
- Loaded cost / FTE = $105k
- Labor Savings:
  - $288k

What Key Performance Indicators (KPIs) will the AI solution improve?

- Reduce operating costs by $X
- Increase sales by Y%
- Save Z hours of manual work per month
- Focus on
  - Cost savings
  - Revenue gains

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Include Intangibles and Strategic Value

- Examples of **Intangible benefits**
  - improved decision quality,
  - faster time-to-market,
  - better customer experience,
  - enhanced brand reputation
- Consider the **cost of inaction** –
  - Do we risk falling behind competitors
  - Missing a critical efficiency improvement?

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Emphasize Three Key Business Case Factors

Cost Savings

Revenue/Value Upside
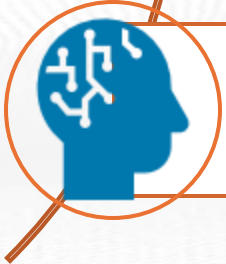
Competitive Advantage

"Investing $X in this AI solution over 12 months will likely yield $Y in net benefits in year 2 (ROI of Z%), strengthen our customer loyalty, and free up our teams for more strategic work – positioning us as a leader rather than a follower"

Risks and Governance

Risk Category	What Could Go Wrong	Typical Executive Symptoms
Data Quality & Access	Incomplete, siloed, or low-trust data poisons model outputs; integration overruns.	"Dashboards don't match finance numbers."
Model Bias & Ethical Harm	Discriminatory outcomes, reputational damage, regulatory fines.	"Why did our resume screener reject 70 % of one demographic?"
Security & Privacy	Breaches, IP leakage, elevated insider-threat surface (prompt injection, jailbreaks).	"Customer PII showed up in ChatGPT logs!"
Hallucinations & Accuracy	LLM invents facts, jeopardizing decisions and contracts.	"Copilot cited a policy that doesn't exist."
Regulatory & Compliance Drift	New global AI acts (EU AI Act, U.S. AI Bill of Rights) outpace internal controls.	"Legal can't sign off; rules changed last quarter."
Model Drift & Technical Debt	Performance degrades as data patterns evolve; retraining backlog grows.	"Support tickets spiked—model accuracy dropped 15 %."
Vendor Lock-In & Cost Creep	Over-reliance on one cloud/model; surprise token bills or per-user license hikes.	"Inference spend doubled this quarter—why?"
Change-Management Failure	Workforce resistance, low adoption, shadow-IT workarounds.	"Only 12 % of staff use Copilot after launch."
Skill Gaps & Talent Scarcity	Shortage of AI engineers, MLOps, or SME champions to own solutions.	"Our one data scientist is on PTO—project stalled."
Strategic Misalignment	Cool tech disconnected from P&L; pet projects starve ROI initiatives.	"We automated the wrong process—savings are negligible."

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Mitigation Snapshot

- **Data Basecamp**: Fabric/OneLake governance policies, data quality checkpoints.

- **Responsible-AI Gear**: Bias testing, explainability dashboards in Azure ML; ethics committee sign-off.

- **Security Ropes**: Zero-trust identity, Azure OpenAI private networks, prompt-filtering gateways.

- **Drift Beacons**: CI/CD + MLOps pipelines with automated retraining triggers.

- **Cost & Flexibility Plan**: Multi-model architecture (OpenAI + SLM fallback), reserved-instance budgeting.

- **Enablement Oxygen**: AI Academy, champion network, incentive-aligned KPIs.

- **Governance Trail Map**: Quarterly compliance reviews, policy versioning, executive steering committee.

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Bring the right tools

Experience layer
Copilots Agents

AI layer
Azure OpenAI

Data layer
Fabric OneLake

Equipping for Success

Microsoft's ecosystem serves as a reliable toolkit and map.

These technologies are designed to work together, providing a secure, scalable foundation so you can focus on innovation over integration.

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Microsoft Fabric: Unified Data & Analytics

Azure AI Foundry:

Cutting-Edge AI Models with Enterprise Safety

- *What it is*: Azure OpenAI is Microsoft's managed service providing access to OpenAI's advanced models (GPT-4, etc.) in the Azure cloud, complete with enterprise-grade security, scalability, and integration capabilities.

- *Why it matters*: It allows you to infuse **pre-trained generative AI** into your applications – from chatbots to document analysis – without starting from scratch.

- Because it's on Azure, you get **secure, compliant infrastructure** (critical for sensitive business data) and the ability to **ground the AI on your own data**.

- The key benefit is **speed and quality**: drastically shortening development time for AI solutions.

- **Integration:** Azure OpenAI plugs into the rest of the ecosystem – you can feed it data from Fabric, orchestrate it with Power Platform or custom apps, and monitor usage with Azure's tools.

Microsoft Copilot and Copilot Studio

Agentic Patterns

ReAct Agent

A reasoning and acting framework where an agent alternates between reasoning (using LLMs) and acting (using tools like Google or email).
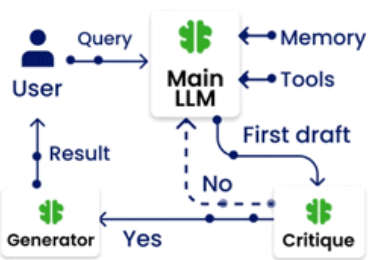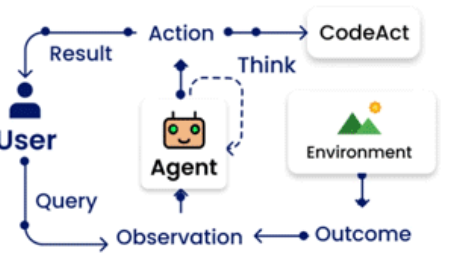
Used by: Most AI Agent Products

CodeAct Agent

The CodeAct architecture by Manus AI allows agents to autonomously execute Python code instead of using JSON, enabling them to handle complex tasks more efficiently.
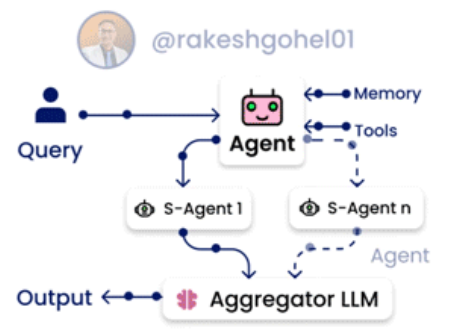
Used by: manus

Modern Tool use

Enables agents to leverage tools like Kagi Search, AWS and others using MCP for enhanced functionality with very little code execution.

Used by: CURSOR

Self-Reflection

Self-Reflection or Reflexion involves self-evaluating outputs, using feedback to identify errors, and iteratively improving via learning or critiques, enabling adaptation.

Used by: Open Serve AI

Multi-Agent workflow

A Multi-Agent Workflow is a collaborative system where multiple specialized agents work together to build a compressive output with greater precision than single architectures.
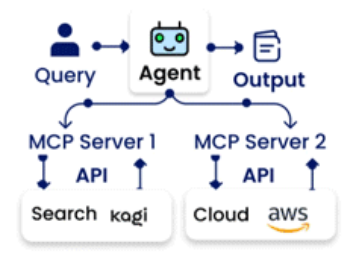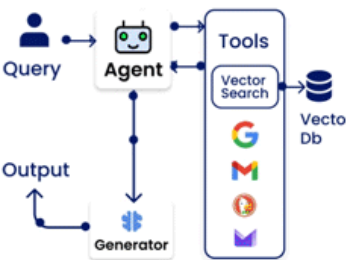
Used by: Gemini Deep Research

@rakeshgohel01

Agentic RAG

Agentic RAG involves AI agents retrieving and evaluating relevant data to generate context-aware and well reasoned output using memory and tools.

Used by: perplexity

Pattern	What It Does	Business Payoff
ReAct (Reason-and-Act)	Agent "thinks" about next step, calls a tool/API, then reflects on result in a tight loop.	Fast experimentation—great for chatbots that must fetch live data or trigger workflows.
Planner → Doer	One agent decomposes a user goal into tasks; specialist agents execute each task.	Handles multi-step (e.g., quote-to-cash) while maintaining auditability.
Reflection / Self-Critique	Agent reviews its own output, spots errors, retries.	Boosts accuracy—reduces hallucinations before results
Multi-Agent Orchestration ("Crew")	Coordinator agent assigns jobs to multiple peer agents (researcher, writer, validator) and merges results.	Parallelizes complex work—e.g., proposal creation in minutes, not days.

Rakesh Gohel
@rakeshgohel01

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Quick Wins & Early Milestones

- Leverage Low-Hanging Fruit
- Deploy Copilots to Empower Teams
- Pilot in One Area, Then Scale Out
- Celebrate and Publicize Early Wins
- Learn and Refine

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Long-Term Vision

- Think in Platforms and Building Blocks
- Plan for a Multi-Agent World
- Cultivate AI Talent and Culture
- Maintain Responsible AI and Governance at Scale
- Envision the "AI-Empowered Enterprise"

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Era of Opportunity
    Similar to the early internet era
    Proactive and strategic actions define future market
    leaders
Tools and Knowledge
    Partnerships with companies like Microsoft
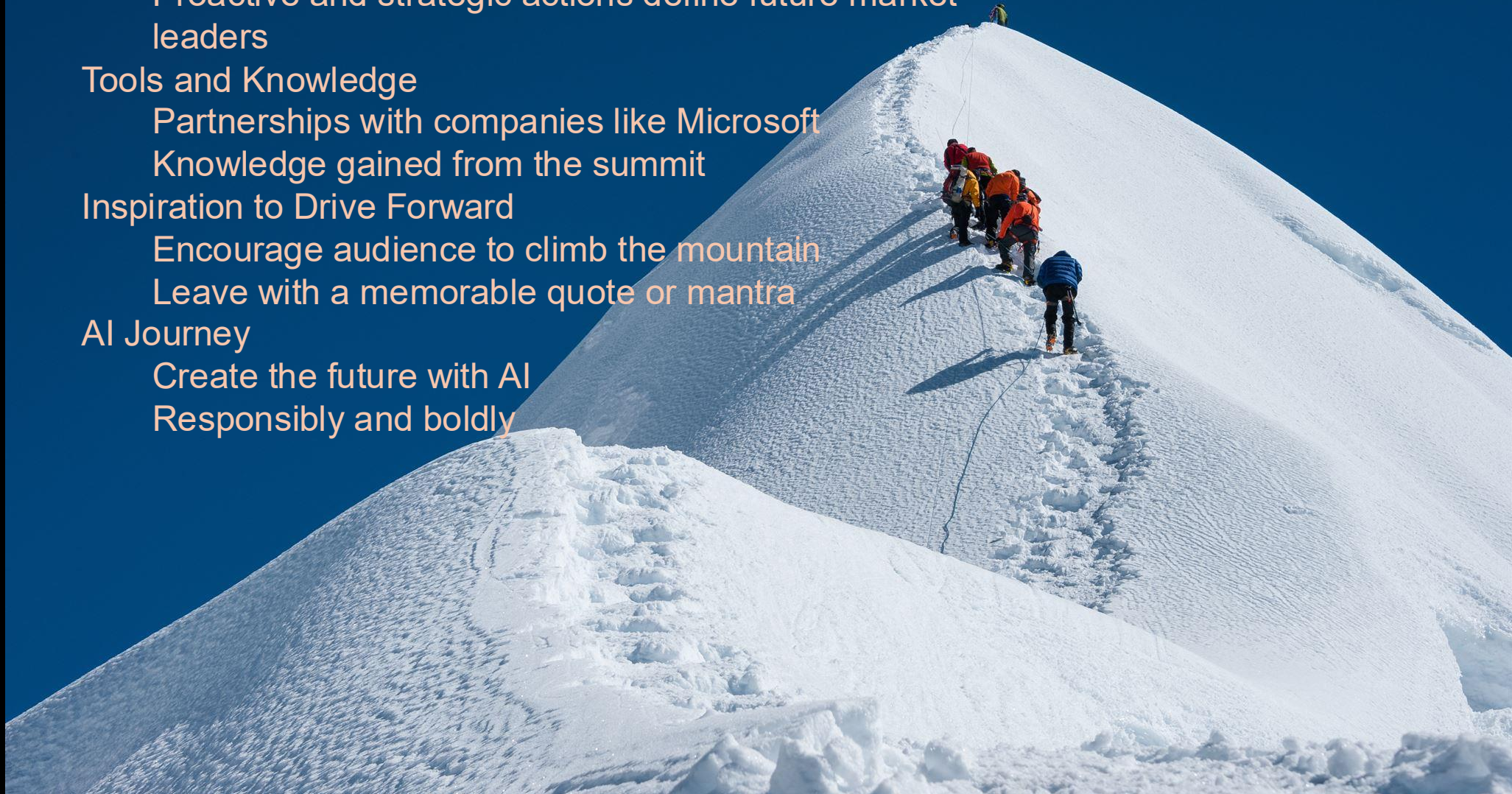   Knowledge gained from the summit
Inspiration to Drive Forward
    Encourage audience to climb the mountain
    Leave with a memorable quote or mantra
AI Journey
    Create the future with AI
    Responsibly and boldly

How we can help:

- **Secure AI for Everyone: Copilot Adoption and Momentum Assessment**

- **Anatomy of an Agent: Copilot Studio, Agent or Multi-Agent Discovery Session**

- **Executive AI Envisioning Session**

- **Bring the Event to You!** – We will present any topic/topics from our event at your organization.

Virtual AI Momentum Summit 2025

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Thank you!

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