THE BUSINESS LEADER'S

Agent Handbook

Your Practical Guide to Navigating AI AGENTS and Automating Success for Any Business

Chapters

Introduction

Why AI Matters to Your Business

Artificial Intelligence (AI) is transforming industries and redefining how businesses operate, compete, and grow. By 2030, AI

is expected to contribute $15.7 trillion1 to the global economy, making it essential for businesses to adopt AI to stay competitive.

Companies integrating AI are already outpacing their competitors, with firms that invest in AI significantly seeing a 20% increase in revenue2 compared to those that haven't embraced

the technology.

This guide simplifies AI for business leaders, offering clear, actionable steps to leverage AI effectively.

Purpose of This Guide

Designed for business leaders, this guide covers the fundamentals of deploying Ai agents, assessing your organization's readiness, and the best strategies for integrating Agents into your operations. By the end, you'll be much better equipped to execute successful AI implementations.

What is AI?

Artificial Intelligence (AI) refers to machines' capability to perform tasks that typically require human intelligence. This includes processes like learning, reasoning, problem-solving, under- standing natural language, and perception. AI encompasses a variety of technologies, including machine learning (ML), natural language processing4 (NLP), computer vision, and robotics. The AI market is growing at an unprecedented rate, with its global value projected to surge from $86.9 billion in 2022 to $407 billion by 2027.

This rapid growth underscores the increasing adoption of AI across various industries, from healthcare and finance to retail and logistics. At its core, AI is designed to help us make better decisions, automate repetitive tasks, and solve complex problems. Unlike traditional software, which follows predefined instructions, AI can learn from data through the process of model training. This means that AI is able to adapt to new information and even improve its own performance over time.

Agents vs. Traditional Software

One key distinction between AI and traditional software lies in how AI processes information and makes decisions. Traditional software operates based on explicitly programmed instructions: If Event X happens, execute Operation Y. This rigid framework limits the software's ability to handle unexpected situations or adapt to new data without human intervention.

In contrast, Agent based systems, particularly those are designed to recognize patterns in data, as well as user inputs and make decisions based on those patterns and input. For example, consider the difference between a rule-based customer service chatbot (traditional software) and an AI-powered Agentic Agent chatbot. The rule-based bot can only respond to specific commands it was programmed. In contrast, the Agentic Agents can understand and respond to a wide range of queries by drawing on its training data and learning from each interaction.

This allows AI to handle more complex tasks; automation and intendent decision making like Appointment scheduling in healthcare, resolving tickets in IT or helping a new employee onboarding in HR.

Chapter 1

The Business Case for Agents in the Enterprise

Some business leaders have dismissed Agents as a passing fad: They don't see value in AI's more flashy applications, like resolving customer questions or handling patient queries. Most of the hype has settled around Chat GPT ascendance and the ability to handle consumer queries. However, AI is much more than ChatGPT. Enterprise AI offers transformative benefits across industries, enabling businesses to automate tasks, optimize operations, and make data-driven decisions. McKinsey estimates that AI could automate approximately 30% of the tasks currently performed in about 60% of occupations.[7] Enterprises across every industry are already seeing major impacts of AI agents on a daily basis.

First, consider areas with repetitive tasks and workflows that require a lot of manual labor and manual data manipulation:

Healthcare (Patient Experience):

- Appointment Scheduling
- Billing & Payments
- Health Insurance
- Symptom Check & Triage
- Medication Management
- Health Insurance
- Lab & Test Results, and
- MyChart Support

HR, IT, Procurement (Employee Experience):

- Time-Off Management
- Benefits Navigation
- Travel & Expenses
- Employee Onboarding
- Payroll
- Procure-to-Pay
- Talent Acquisition

Customer Service (Customer Experience):

- Accounts & Membership
- Products & Services
- Sales Concierge
- Billing & Payments
- Customer Support
- Orders & Shipping
- Appointment Scheduling

These are some areas where AI Leaders profess to have the most value realization.Companies that successfully integrate Agents into their operations can expect a significant competitive advantage. According to a study by Boston Consulting Group, companies that are leaders in AI adoption dedicates an average of 4% of their revenue to AI initiatives, compared to just 2.7% by lagging competitors. This investment pays off, as AI leaders see up to a 20% increase in overall revenue.

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7 McKinsey Global Institute, "Generative AI and the Future of Work in America," McKinsey & Company, https://www.mckinsey.com/mgi/our-research/generative-ai-and-the-future-of-work-in-america

Chapter 2

Preparing for Agents

Studies have shown that businesses benefit from Agents, but many implementation attempts fail due to improper prep work. Understanding your specific needs and uses lays the groundwork for success.

Elements of Agent Readiness

Agent readiness involves evaluating several key factors, including your technological infrastructure, data quality, workforce capabilities, and organizational culture.

Prepping your Data

AI functions by ingesting existing data and using it to make informed decisions in a range of situations.

Thus, high-quality data is the foundation of any successful Agent initiative. When preparing for Agent deployment, you must assess where your data is stored, how it's organized, and whether it's easily accessible. Inconsistent or poor-quality data can lead to inaccurate Agent outputs and suboptimal outcomes. High-quality data is the foundation of AI. You must understand the two main types of data you possess:

Structured Data: Highly organized data found in spreadsheets and databases (hierarchical and relational). Accessing data in fields along with the related schemas (shapes) that data is part of will be essential to using it here.

Unstructured Data: Everything else is the "messy" data, including web pages, emails, PDFs, chat logs, call recordings, and much more, accounting for the majority of enterprise information. There can be dozens to hundreds of sources, from file shares like SharePoint to Knowledge Bases in Salesforce, ServiceNow, Workday, and many others.

Assessing your Voice Infrastructure

When deploying Voice Agents, your telephony infrastructure needs to hold up its part of the chain. This means reliable, low-latency connections (SIP trunking) to help ensure the Agent can respond instantly, preventing the "awkward silence" of delays or interrupted conversations that can confuse and frustrate callers.

Workforce Preparedness

Successful Agent implementation requires a skilled team that understands AI technologies. Assess your current workforce for any gaps in AI and data science knowledge, and consider

offering training programs to bridge these gaps. Another method is to collaborate with your Agent vendor to build the initial AI solution and have them train your workforce.

Organizational Culture for Agent Adoption Success

Incorporation of Agents into your workforce is as much about cultural readiness as it is about technology. Organizations that embrace innovation and are open to change tend to succeed with new technologies, and AI is no exception. Reflect on your team's adaptability and leadership's commitment to Agent adoption, as cultural resistance can significantly hinder AI implementation and adoption.

For instance, your business may encounter resistance from employees who fear that Agents could replace their jobs or who lack a clear understanding of the new technology's purpose. This lack of understanding and fear can lead to low engagement, ultimately resulting in an ineffective launch.

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AI Agents: AI workforces with human-like intelligence. Transforming employee support, workforce management, and healthcare.

Emily - Customer Support Agent

Emily Farr
Incoming

Nico - Human Resources

AvaamoHR
Welcome to the team Helen! What can I set up for you?

Claudia - Medications and testing

Avaamo Health
Our records indicate you are due for a mamogram. Would you like to schedule an appointment?

Emily | Customer Support

Our CX agent workforce learns from every call, reasons, and personalizes your customer relationships around the clock.

Nico | Employee Support

Our IT and HR agents provide proactive, personalized assistance to streamline your workforce management.

Claudia | Healthcare

Our Healthcare Agents provide 24/7 personalized care assistance throughout the entire patient journey.

Step-by-Step AI Readiness Assessment

Follow these steps to prepare for your Agent implementation.

STEP 1

Identifying ROI Opportunities

Before deciding what Agent solution to right for you, companies must understand where Agents can help the most. Look at your current processes and where your employees spend their time.

First, consider areas with repetitive tasks and workflows that require a lot of manual labor and manual data manipulation:

Healthcare (Patient Experience):	HR, IT, Procurement (Employee Experience):	Customer Service (Customer Experience):
• Medication Management • Health Insurance • Lab & Test Results • MyChart Support	• Benefits Navigation • Travel & Expenses	• Customer Support • Orders & Shipping • Appointment Scheduling

Next, identify tasks that require quick and easy scaling. These are some areas where AI Leaders profess to have the most value realization.

Healthcare (Patient Experience):	HR, IT, Procurement (Employee Experience):	Customer Service (Customer Experience):
• Appointment Scheduling • Billing & Payments • Health Insurance • Symptom Check & Triage • Medical Records	• Time-Off Management • Employee Onboarding • Payroll • Procure-to-Pay • Talent Acquisition	• Accounts & Membership • Products & Services • Sales Concierge • Billing & Payments

STEP 2

Current Legacy Data Infrastructure Analysis

Agents and data are closely interconnected; Agents rely on data / existing workflows to learn. Depending on your customer's, employee's, or supplier's questions, Agents make decisions to retrieve information from your data, autonomously execute your existing workflows and log completed information in your systems of record (SoR).

Partnering with an Agent specialist vendor can help you thoroughly assess your data: They will help examine the quality and accessibility of your data, identify its sources, evaluate its overall condition.

Assess your APIs from your systems of Record like EPIC, Salesforce, ServiceNow, and others and analyze how data flows through your organization. Your Agent platform specialist can also suggest improvements to optimize your data processes.

If feasible, you should collaborate / map your data architecture to identify what is working well and where improvements are needed.

A regional healthcare provider deployed a pre-built MyChart Support agent that successfully automated 63% of the MyChart Password Reset and MyChart Activation requests that were previously going to outsourced live agents. This resulted in a starting expected monthly value of $90,000 saved.

STEP 3

Plotting Feasibility and Effort Compared to ROI

After assessing your capabilities and opportunities, compare the required effort and feasibility against the potential return on investment (ROI) for each outcome.

1. Create a list of opportunities ranked by their expected ROI.

2. Eliminate those that are not currently feasible, or set them aside for reassessment at a later time.

3. Next, evaluate the amount of effort needed for each feasible opportunity.

For example, adopting Agent tools available in the market might be quickly actionable and deliver cost or efficiency benefits. On the other hand, developing a custom AI solution may require more time and resources

Prioritize options that are both feasible and provide the greatest value with the least effort. Start by focusing on tasks /workflows that are easier to implement but offer high returns.

Chapter 3

Types of AI Implementations

After completing your readiness assessment and audit, you have two primary options:

Option 1:
Leveraging readily available Agent technologies, or

Option 2:
Developing custom Agent solutions tailored to your specific needs.

Each option has its strengths, and the best choice depends on your business goals, resources, and the urgency of your AI journey

Leveraging Existing Agent Technologies: Quick and Effective

For many businesses, leveraging existing out of the box Agent platforms offers a faster and more cost-effective

path to adoption. These technologies are often developed by industry leaders and can be implemented quickly, providing immediate benefits without needing in-house development. One of the major drawbacks of using off-the shelf tools is that they can be difficult to customize; that said, current AI tooling from specialized platforms is quickly surmounting this issue.

Custom AI Solutions: Tailoring to Your Needs

Building your own AI solutions allows you to create technology that is precisely suited to your business. This approach offers complete control over the development process, ensuring that the AI integrates seamlessly with your operations and evolves as your needs change.

However, this route demands significant investment in time, money, and expertise, and is best suited for larger businesses with dedicated AI teams where tooling, infrastructure and skillset and technology investments are committed to long-term optimization goals.

Making the Right Choice

Deciding whether to leverage existing Agent technologies or build custom Agent solutions depends on your business's specific needs. If your challenges are unique and require a specialized solution, or if you want to prioritize long-term cost savings, custom Agents might be the way to go. If speed and initial costs and speed-to-value are your priorities, leveraging pre-built, out-of-the-box AI software products/technologies could be the best choice.

The Benefits of Partnering with an Established Agent Provider

The advantages of "Been there, done that"

Scaling an AI solution is a complex process that often requires specialized expertise and resources.

This is where partnering with your vendor of choice who not only understand the complex interactions of your workflows, domain, and legacy data infrastructure can get you off to a faster start.

Specialist Agent vendors can provide significant advantages:

Expertise and Experience

Ai is still new and mitigating risk by partnering with Agent platforms that have experience scaling solutions across your industry and can anticipate potential challenges before they arise.

Access to Resources

These companies can provide access to advanced tools, technologies, and skilled professionals like Forward Deployed Engineers (FDEs) that may not be available in-house. This can accelerate the scaling process and ensure that the AI solution is built using best practices.

Cost Efficiency

While it may seem costly to hire your software company for implementation instead of a Systems Integrator, the nature of Ai, speed of advancement, the long-term benefits often outweigh the initial investment. They can help avoid costly mistakes, streamline the development process, and ensure that the solution is scalable, reliable, and efficient and you have one throat to choke for both the software and successful deployment

Ongoing Fine Tuning

AI is not like other software; it's not a software install and everything works on Day 1. There continues to be an ongoing need for fine tuning, managing outputs, and ensuring accuracy. After the solution is deployed, the chosen Agent vendor provides different levels of support can provide ongoing support and maintenance, ensuring that the Agent system continues to operate smoothly and evolves alongside your business needs.

Using a pre-built Care Scheduling Agent, deployed with the assistance and guidance of an FDE, a major healthcare provider quickly achieved over 50% end-to-end automation both for confirming and cancelling appointments.

BONUS: It also successfully assisted live agents on over 80% of the Scheduling and Reschedule calls by collecting contextual information to shorten handle times.

Chapter 4

The Real Work Begins Measuring Agent Success

After implementing an Agent solution, the real work begins—ensuring it delivers on its Goals and continues to align with your business goals. Measuring the success of your Agent initiatives isn't just about numbers. it's about understanding how the technology integrates into your operations and contributes to your overall strategy.

Understanding Key Performance Indicators (KPIs)

To evaluate the effectiveness of your Agent-based solution, you need to establish clear, meaningful Key Performance Indicators (KPIs). These metrics are your guideposts, helping you monitor the system's performance and its impact on your business.

Think of **Accuracy** as the foundation of any Agent. Whether it's responding with accuracy to user queries, resolving issues, or processing language, accuracy determines how well the Agent is doing its job. But accuracy alone isn't enough.

Efficiency is another critical metric—how much time or

other resources is the Agent saving you? This could mean faster processing speeds, fewer manual tasks, or more efficient resource allocation. Quantifying these savings is key to objective evaluation.

High Adoption Rates and Positive User Feedback indicate that the Agent is not just working but adding real value. And then there's the bottom line: Cost savings. Measuring how much money the Agent is saving your business, whether through reduced labor costs, fewer

errors, or streamlined operations, gives you a direct line to understanding its financial impact.

Finally, **Scalability** is key as you expand the Agent's role in your business. Can the solution handle more data, more users, and more tasks without faltering? Monitoring how well your Agent scales ensures it remains a robust tool as your business

Typical Metrics to measure include:

Experience Metrics

- Containment Rate

- Average Time-to-Response

- Interruption Handling Rate

Infrastructure Metrics:

- End-to-End Latency

- Error Rates & Timeouts

- Call Transfer Reliability

- System Uptime

Value Realization

- Task Completion Rate

- Pre-Authorization Success Rate

- Data Capture Quality,

- Live Agent Average Handle Time (AHT) Reduction

Deploying Agents is Not a Software Install

The Importance of Continuous, Iterative Fine Tuning

Deploying Agents isn't a set-it-and-forget-it solution. To truly harness its potential, you need to engage in ongoing evaluation and refinement.

Regular reviews are essential—these are opportunities to analyze those Experience, Infrastructure, and Value Realization KPIs

It's important to gather user feedback to help identify areas where the Agent could be improved; this is where iterative improvements come into play.

Based on your reviews, you might retrain the Agent with new data, refine algorithms, or optimize workflows to enhance performance. It's also crucial to ensure your Agent remains aligned with your business goals.

As your company evolves, so should your AI strategy. This could mean expanding the Agent's capabilities in phases:

START	**START**	**START**
Patient Experience (PX)	**Employee Experience (EX)**	**Customer Experience (CX)**
1. Frequently Asked Questions	1. Frequently Asked Questions	1. Frequently Asked Questions
2. Find a Doctor	2. New Hire Onboarding (HR & IT)	2. Orders & Shipping
3. Schedule An Appointment	3. Time Off Requests (HR)	3. Accounts & Membership
4. Get Test Results	4. IT Support – Troubleshooting (IT)	4. Sales Concierge
5. Medication Management	5. Ticket Management (HR & IT)	5. Appointment Scheduling
6. Billpay, etc.	6. Payroll (HR)	6. Billpay, etc.
	7. Purchasing (Procurement)	

Evolving advancements or changes in regulations, can also impact your Agent. Staying informed about these developments allows you to adjust your strategy proactively, keeping your Agent competitive and compliant.

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Avaamo is an advanced multimodal Agentic AI platform empowering global enterprises to automate and deliver outstanding self-service experiences. Our patented AI technology spans voice transcription, natural language understanding, generative AI, and call center automation. Avaamo supports self-service interactions across Healthcare, HR, IT, and customer service for leading global companies. Facilitating over 2 billion interactions annually in 114 languages, Avaamo seamlessly integrates with 200+ common enterprise applications. Visit avaamo.ai to witness how Avaamo is shaping the future of Agentic-enabled enterprise. Join us at the forefront of innovation!

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