



# Guide to Agentic AI

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# Introduction

Agentic artificial intelligence (AI) is more than a technological upgrade — it's a fundamental shift in operations, with the potential to impact every facet of business, from customer interactions to internal workflows. Unlike traditional automation, which follows predefined, rules-based workflows, agentic AI can understand context, learn from interactions, and take independent actions to achieve business objectives.

Successful implementation of agentic AI requires organizations to balance innovation with responsibility, building systems that create business value while protecting data privacy, security, and promoting ethical use.

This guide provides a roadmap for organizations looking to harness the power of agentic AI. From strategy development through implementation, learn how agentic AI can help your organization unlock new efficiencies, enhance decision-making, and grow your competitive advantage in an increasingly AI-driven world.

**Here are 5 steps that BDO recommends for an AI-empowered organization.**



## STEP 1: EDUCATE

Understand AI and what it can do — its practical applications, risks, and limitations.






# What is Agentic AI?

Agentic AI is characterized by systems that can make decisions independently and execute complex workflows with minimal human intervention. These autonomous agents go far beyond traditional automation by interpreting complex business objectives, making contextual decisions, learning from outcomes to adjust strategies, and coordinating with other systems.

Traditional automation focuses on streamlining specific, repetitive tasks through predetermined workflows based on simple “if-then” logic. In contrast, agentic AI employs a more sophisticated “understand-decide-act” process, making autonomous decisions based on data analysis and defined objectives.

By enabling systems to operate with greater independence and intelligence, agentic AI represents the next evolution in automation — one that promises to reshape how organizations operate, innovate, and deliver value.

## AUTOMATION LEVELS

	How it works	What it's best for
 <b>Robotic Process Automation (RPA)</b>	Rules-based software robots (“bots”) mimic human action by following predefined, structured paths.	Repetitive, rules-based tasks (e.g., data entry and transfer, form filling and processing, IT system health checks and installations).
 <b>Intelligent Automation</b>	RPA is combined with AI and machine learning (ML) capabilities, enabling it to analyze unstructured data and adapt to process variations.	Complex processes that involve decision-making support (e.g., customer service, maintenance scheduling, inventory management, and demand forecasting).
 <b>Agentic Automation</b>	Autonomous AI agents harness generative AI to recognize patterns, plan actions, make decisions, and collaborate with other agents and humans.	Multi-step problem solving and strategic decision-making (e.g., competitive and market analysis, resource allocation optimization, risk assessment and mitigation).

## AGENTIC AI VS. GENERATIVE AI

Agentic AI is not separate from generative AI; rather, it harnesses generative AI capabilities alongside decision-making frameworks, creating powerful agents designed to handle complex, multi-step problems.



# Agentic AI Strategy

## EXECUTIVE VISION AND OBJECTIVES

Before strategy development can begin, organizations must clearly define their executive vision — both incremental goals and long-term objectives — that will support the broader business. The executive vision should also clearly articulate the value proposition of your investment by [calculating projected ROI](#), factoring in operational efficiencies, cost reduction, and revenue growth opportunities.

Leaders should define success across various business functions, with clear metrics and benchmarks like improved customer experience and employee productivity. This approach drives accountability, provides a framework for evaluating progress, and cultivates stakeholder buy-in by clearly identifying the ways in which the investment is bearing fruit.

## CURRENT-STATE ANALYSIS

A thorough assessment of the current environment is key to identifying opportunities for enhanced automation and improved decision-making. This analysis should address potential risks and implementation challenges such as data security, compliance, and user adoption.

The current-state analysis must also gauge organizational readiness to uncover gaps that must be closed before implementation can proceed. This includes not only technical infrastructure and data management capabilities, but also workforce needs such as AI literacy and new skillsets.



## STEP 2: DEFINE YOUR AI VISION, JOURNEY, AND IMPACT

Align your vision with your organizational goals, ethical principles, and sustainability practices.

