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Guide to AI Agents for Operations Leaders

How to lead the automation revolution with intelligence and impact.

00 Introduction

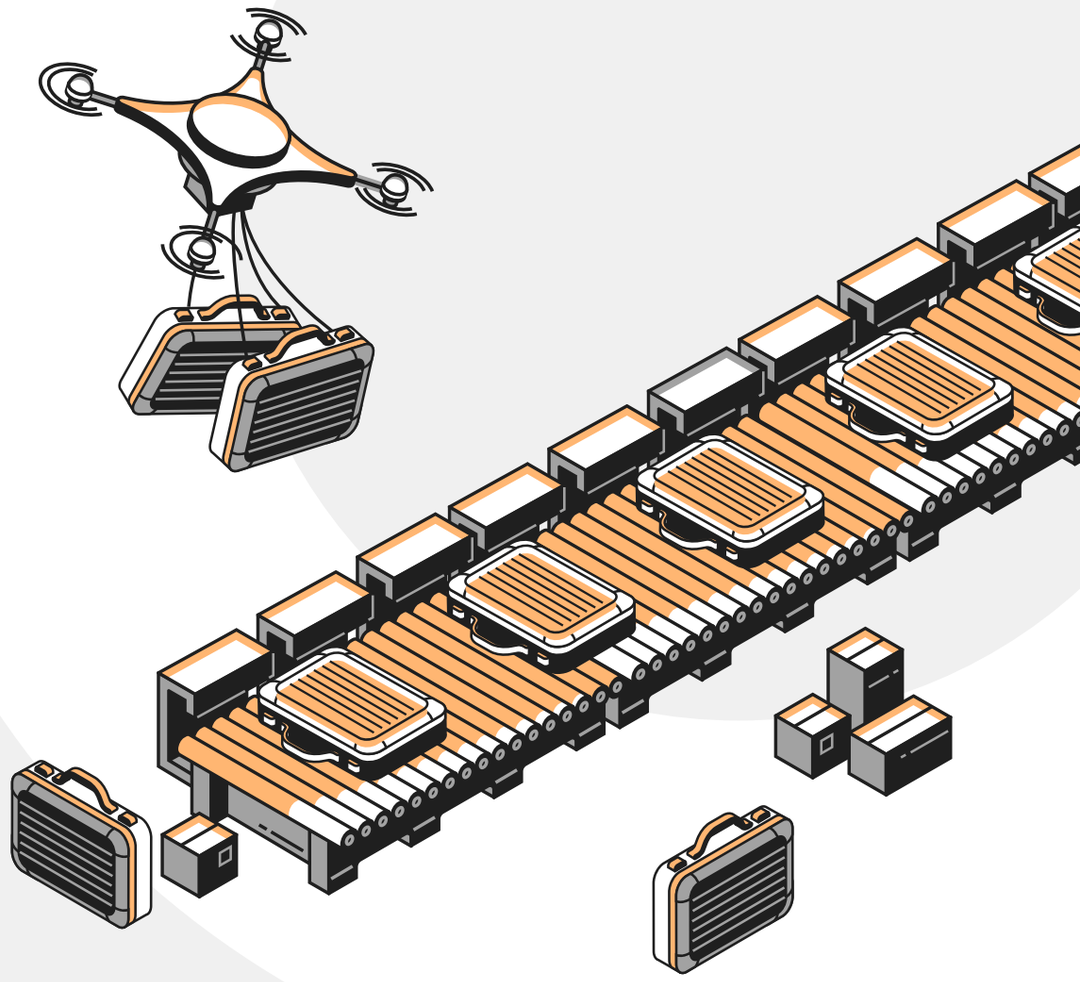
Modern leadership faces the constant challenge of balancing operational efficiency, innovation, and competitiveness.

In this dynamic landscape, **automation based on autonomous AI agents emerges as an indispensable tool,** transforming complex processes into strategic opportunities.

This guide was created for leaders who seek not only to understand trends but also to make informed decisions. Here, we will explore the disruptive potential of AI agents, their applications, and most importantly, how they can position your organization ahead in the market.

If you lead teams, manage processes, or seek innovation, **this is the guide you need to understand and adopt intelligent automation.**

01 The Landscape of Automation with Autonomous AI Agents



Automation is no longer a novelty.
It is deeply rooted in modern operations,
from production lines to large-scale data analysis,
but what we are experiencing now **is a new era.**

Autonomous AI agents represent intelligent automation, or **Automation 2.0**, where systems not only follow rules but also learn, make decisions, and evolve based on real-world data and scenarios.

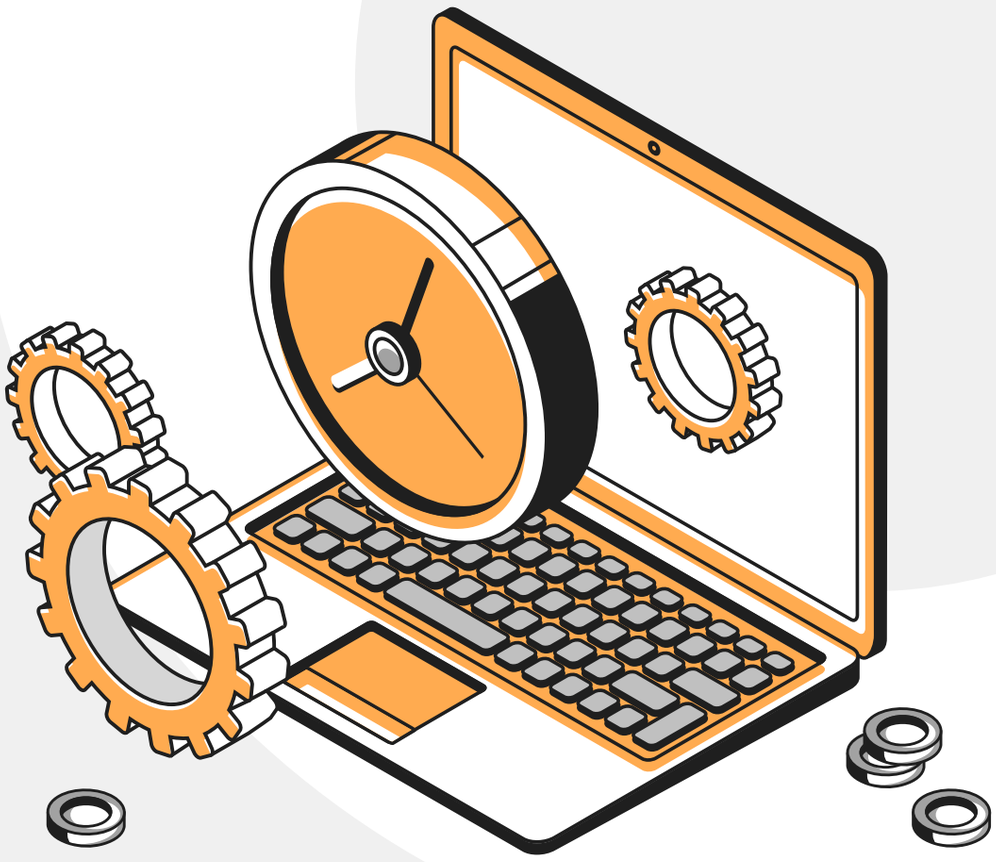
WHY DOES THIS MATTER?

According to Gartner, by 2028, at least 15% of daily work decisions will be autonomously made through agentic AI, up from 0% in 2024. Companies leading this adoption are already reporting significant gains in efficiency and competitiveness.

This transformation is no longer about doing things "faster." It's about doing things "better" and "smarter."

Source: Gartner, "Top Strategic Technology Trends for 2024".

02 Types of Automation



Automation has evolved in three major waves:

01 **TRADITIONAL AUTOMATION / RPA 1.0**

02 **INTELLIGENT AUTOMATION / AI WORKFLOWS / RPA 2.0**

03 **AUTONOMOUS AI AGENTS**

01

TRADITIONAL AUTOMATION (ROBOTIC PROCESS AUTOMATION 1.0 OR RPA 1.0)

Traditional Automation is more deterministic and focused on repetitive tasks based on clear rules, such as structured data processing and the generation of predefined outputs.

Examples of traditional automation include the automation of managerial processes, automatic updating and maintenance of systems and databases, file processing for integration, periodic report generation, among others.

02

AUTOMAÇÃO INTELIGENTE / AI WORKFLOWS / RPA 2.0

Examples:

CREDIT APPROVAL SYSTEMS

Used by banks and fintechs for predictive risk analysis, enabling fast, data-driven decisions.

LOGISTICS OPTIMIZATION

Applications for forecasting seasonal demand, optimizing transportation routes, and minimizing waste across the supply chain.

UNSTRUCTURED DATA PROCESSING

Systems can extract insights from unstructured data in real time, enhancing decision-making capabilities.

Intelligent Automation, also known as AI Workflow or RPA 2.0, involves **integrating AI processing within the workflow of a deterministic process.** This incorporation allows systems to process unstructured or subjective data and add intelligence to the process—something that is not possible with RPA 1.0.

Workflows can incorporate routing decisions within the process itself, based on **real-time AI-driven data interpretations.**

Predictive analytics mechanisms embedded in the workflow can anticipate behaviors and **identify complex patterns, optimizing critical processes and dynamically adapting to new data and contexts.**

Recent Studies Highlight the Positive Impact of This Technology:

GARTNER, "HYPERAUTOMATION TRENDS 2024":

Reports that intelligent automation tools can increase organizational efficiency by up to 30%, particularly in areas like finance, customer service, and logistics operations.

Source: www.gartner.com/en/articles/gartner-top-10-strategic-technology-trends-for-2024

MCKINSEY, "THE NEXT NORMAL IN OPERATIONS":

Highlights that adopting AI-powered intelligent workflows helps optimize processes such as credit approval and logistics management, achieving up to 20% reductions in operational costs.

Source: www.mckinsey.com/capabilities/operations/our-insights/rethinking-operations-in-the-next-normal?utm_source

03

AUTONOMOUS AI AGENTS

Autonomous AI agents establish a new level of automation, enabling systems to operate independently, make decisions based on continuous learning, and **adapt to new information in real time.**

Unlike previous approaches, they may not have rigid rules dictating how they should work but rather **broader guidelines on how specific tasks should be performed.** Autonomous AI agents operate in specialized ways and can be developed to work individually or in groups, known as Multi-Agents.

Autonomous AI agents are designated as professionals or members of a work team. For example, it is possible to create a Multi-Agent system that functions exactly like an advertising agency, consisting of a Marketing Director, Advertiser, Copywriter, Designer, Proofreader, and Coordinator. Each role in this team is represented as an Autonomous Agent with its own skills and functions. These agents receive tasks and are coordinated by the Coordinator. Each one contributes to a broader process—in this example, the team of agents would be capable of developing a complete marketing campaign.

An important feature is that tools, such as applications and systems, can be provided for the agents to use in executing their tasks.

Key Characteristics of Autonomous AI Agents

OPERATIONAL INDEPENDENCE

Using techniques such as generative AI models and memory, these agents can adjust their strategies based on market variables or changes in operational environments. They are specialists who receive a task and determine the best way to execute it.

CONTINUOUS LEARNING CAPABILITY

These systems leverage real-time data to learn and adjust their behavior without the need for manual reprogramming.

Examples of Use Cases

FINANCIAL ASSISTANTS

Tools from companies like Morgan Stanley that use AI to personalize investment strategies based on clients' objectives.

AUTONOMOUS SUPPLY CHAIN MANAGEMENT

Companies like Amazon and Walmart utilize agents to monitor inventory and automatically adjust deliveries, reducing waste and optimizing timelines.

ADVANCED CHATBOTS

Applications like ChatGPT are used for technical support, sales, and customer service at scale, providing personalized and rapid responses.

Research Validating Strategic Relevance

PWC,

"THE POTENTIAL OF AUTONOMOUS AGENTS IN BUSINESS":

Estimates that autonomous agents can increase productivity by up to 25%, directly impacting areas such as supply chain and finance.

Source: www.pwc.com/us/en/tech-effect/ai-analytics/ai-predictions.html

DELOITTE,

"AI AND THE FUTURE OF WORK":

Highlights how autonomous agents are being used in the financial sector to analyze portfolios in real time and provide personalized recommendations based on continuous learning.

Source: www.deloitte.com/global/en/services/consulting/research/generative-ai-and-the-future-of-work.html

These agents serve as strategic allies, allowing organizations to scale operations and quickly adapt to market changes while keeping competitiveness and innovation at the core of their strategies.

03 Opportunities for Modern Management with Autonomous AI Agents

Autonomous AI agents transform management by bringing intelligence and autonomy to processes, generating efficiency, accuracy, and agility. This technology expands strategic possibilities, keeping organizations competitive in an ever-changing market.
Below are some opportunities:

COST REDUCTION

Companies adopting automation report efficiency gains of up to 40% and operational cost reductions of up to 30%. AI agents extend these benefits to complex areas like customer service and logistics.

Source: www.mckinsey.com/capabilities/mckinsey-digital/our-insights/the-economic-potential-of-generative-ai-the-next-productivity-frontier

ERROR REDUCTION

Eliminating human errors in critical processes increases data security and reliability.

OPERATIONAL SCALABILITY

Scaling operations without a proportional increase in human resources is a **clear competitive advantage**, especially in dynamic markets.

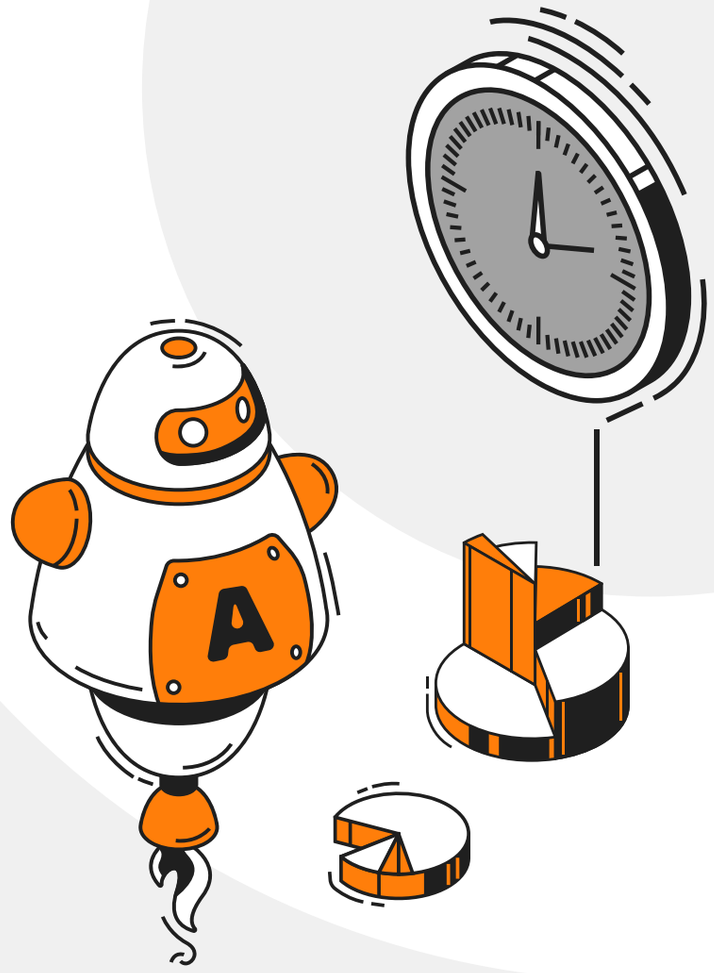
DATA-DRIVEN DECISION MAKING

AI agents enable **real-time analysis** and detailed insights, optimizing strategies and streamlining operations.

SPEED IN ADAPTING TO CHANGE

Automated companies can **quickly respond to market changes**, adjusting efficiently and precisely.

04 Why AI Agent Automation Cannot Be Ignored?



GLOBAL TREND

According to PwC, AI could add $15.7 trillion to the global economy by 2030, making it one of the largest drivers of economic growth

Source: www.pwc.com/gx/en/issues/analytics/assets/sizing-the-prize-regions_v2.png

MARKET DIFFERENTIATION OPPORTUNITY

Pioneering companies in intelligent automation have a unique window of opportunity to stand out in terms of efficiency and innovation.

COMPETITIVENESS AND INNOVATION

AI agent automation cannot be ignored because it directly impacts competitiveness, efficiency, and the ability to innovate, making it a critical success factor in today's digital transformation landscape.

05 The Automation Journey: How to Get Started

Implementing AI-based automation can be a challenging yet rewarding journey. To help organizations get started, it's essential to follow a structured and strategic approach.

Here’s a step-by-step guide to begin intelligent automation.

01 IN-DEPTH STUDY OF THE CURRENT LANDSCAPE

02 STRATEGIC ALIGNMENT AND GOAL SETTING

03 BRAINSTORMING AND INTERNAL ASSESSMENT

04 DEFINING TECHNOLOGIES AND APPROACHES THROUGH POCS

05 SOLUTION ENHANCEMENT

06 IMPLEMENTATION AND MONITORING

01

IN-DEPTH STUDY OF THE CURRENT LANDSCAPE

Before embarking on any automation journey, it’s crucial to conduct an in-depth study of the current landscape. This includes **identifying which AI agents are most relevant to your business** and emerging technologies that can be applied.

Market analysis and the selection of specific frameworks are essential to ensure that the solution meets the organization's needs.

According to McKinsey’s study on the impact of automation, **organizations should evaluate how their operations can be transformed by specific intelligent automation technologies.**

02

STRATEGIC ALIGNMENT AND GOAL SETTING

It’s crucial to align automation with the organization’s **strategic goals.** Set clear and measurable goals to understand how automation will contribute to improving **operational efficiency, cost reduction, and competitiveness.**

Gartner’s research emphasizes that companies that align their technological initiatives with strategic goals are more successful in implementing automation. This helps ensure that AI and automation solutions deliver tangible results for the business.

03

BRAINSTORMING AND INTERNAL ASSESSMENT

The next step is to **conduct brainstorming sessions** with the involved teams and perform an **internal assessment** to understand which processes can be automated.

The internal assessment should identify areas with the highest potential for improvement and automation, such as repetitive processes or those requiring data-driven decisions.

Collaboration among multidisciplinary teams and gathering information about existing operations helps identify weaknesses and opportunities for intelligent automation.

04

DEFINING TECHNOLOGIES AND APPROACHES THROUGH POCS

After analyzing the landscape and setting goals, **it's time to choose the right technologies.** Using Proof of Concepts (POCs) is a common strategy to test solutions before full-scale adoption. With POCs, you can assess the effectiveness of selected technologies, such as RPA (Robotic Process Automation), AI workflows, and autonomous agents.

POCs help companies validate their technology choices, allowing teams to identify potential challenges and adjust approaches before making a full commitment.

05

SOLUTION ENHANCEMENT

Once automation has been implemented, it's important to maintain an ongoing process of solution enhancement.
Automation should be regularly adjusted based on performance feedback, market evolution, and new technological opportunities. Continuous optimization helps maximize the long-term value and impact of automation.
The constant evolution of automation solutions is necessary to stay competitive and innovative. Companies that invest in continuous improvement ensure that their operations remain relevant and effective.

06

IMPLEMENTATION AND MONITORING

Implementation and continuous monitoring are key to ensuring the success of automation. The solution must be carefully monitored to ensure it's delivering the expected results. It's important to adjust automation based on performance and market changes.

According to PwC, studies, effective monitoring of AI and automation solutions helps companies quickly adapt to market condition changes and identify new improvement opportunities.

06 Agentes de IA para o Time de Operações

The operations sector is the foundation that supports the success of any organization. It is responsible for executing processes that ensure the efficient delivery of products or services to customers.

With the increasing complexity of operations, the volume of data generated, and the pressure for quick results, operations teams need innovative solutions to maintain their competitiveness. **AI agents become essential in this scenario, as they are capable of automating processes, anticipating needs, and optimizing decision-making**, providing a level of efficiency that simply wouldn't be possible with traditional solutions alone.

RELEVANCE TO THE SECTOR

AI agents play a crucial role in operations teams by **providing automation, agility, and intelligence** in managing operational processes.

By automating repetitive tasks and enabling real-time data analysis, **AI agents help reduce human errors and increase the company's ability to respond to changes in the market and operational conditions.**

They can also **offer valuable insights, identify bottlenecks, predict trends, and optimize resource usage**, resulting in a leaner, more agile, and more profitable operation.

Integrating AI agents into the operations sector not only enhances productivity but also **enables a smarter and more adaptive approach to tackling future challenges.**

USE CASES OF AI AGENTS FOR OPERATIONS TEAMS

AUTOMATION OF OPERATIONAL PROCESSES

AI agents can automate repetitive, rule-based operational tasks, such as inventory management, stock control, and monitoring production processes.

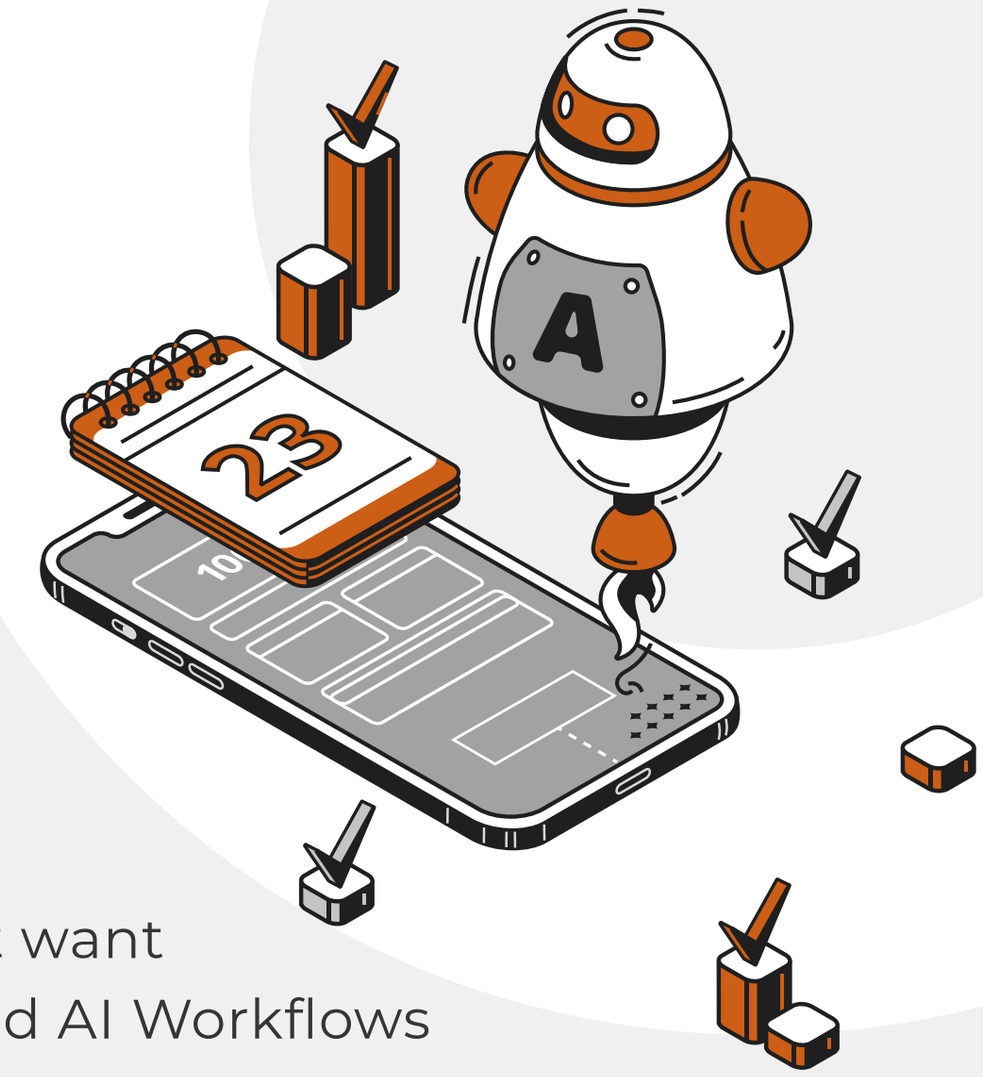
RPA (Robotic Process Automation) tools combined with AI allow these agents not only to execute tasks but also to learn from the data and autonomously optimize processes.

PREDICTIVE ANALYSIS FOR PROCESS OPTIMIZATION

AI agents can analyze large volumes of historical data to predict future trends, identify bottlenecks, and recommend improvements. This helps operations teams anticipate problems, improve resource allocation, and make better decisions.

RISK AND COMPLIANCE MANAGEMENT	AI can be used to help operations teams manage risks and ensure compliance with regulations. AI agents can be programmed to monitor operations in real-time, identify potential risks, and ensure that operational practices are within legal and regulatory parameters.
CUSTOMER SERVICE AND OPERATIONAL SUPPORT	AI agents, such as chatbots and virtual assistants, can be used by operations teams to provide customer support or resolve internal operational issues. They can act as the first line of service, answering frequently asked questions and solving simple problems, allowing human teams to focus on more complex matters.

07 Agentic Now: Softo's Solution for Autonomous AI Agents



Agentic Now is Softo's customized
AI agent factory for organizations that want
to implement Autonomous Agents and AI Workflows
in their operations, bringing intelligent automation to
complex processes, real-time decision-making, and greater
strategic efficiency.

This solution consists of four key stages designed to ensure
technological transformation in an agile, personalized, and
sustainable manner.

01 **CONSULTING, BRAINSTORMING, AND ASSESSMENT**

02 **DEVELOPMENT OF POCS (PROOFS OF CONCEPT)**

03 **FINAL SOLUTION DEVELOPMENT AND IMPLEMENTATION**

04 **OPERATIONAL SUPPORT**

agentic now The AI Agents Factory

01

CONSULTING, BRAINSTORMING, AND ASSESSMENT

The starting point for any autonomous AI agent initiative is a deep understanding of organizational needs and context. At this stage, we combine technical expertise with business insight to define a clear and effective roadmap.

STRATEGIC CONSULTING

Identifying critical areas where autonomous agents can add the most value.

STAKEHOLDER BRAINSTORMING

Collaborative exploration of ideas for applying autonomous agents, aligning business objectives with technological possibilities.

INTERNAL ASSESSMENT

A detailed analysis of processes, infrastructure, and available data, focusing on detecting bottlenecks and opportunities for intelligent automation.

02

DEVELOPMENT OF POCS (PROOFS OF CONCEPT)

POCs are essential for validating ideas before full development and implementation, reducing risks and ensuring the practical feasibility of proposed solutions.

PROTOTYPE CREATION

Small-scale tests to evaluate how autonomous agents perform specific functions within the company’s environment.

TECHNICAL AND BUSINESS VALIDATION

Collecting feedback from internal teams and evaluating initial results, such as error reduction, time savings, and ROI.

QUICK ADJUSTMENTS

Continuous refinement based on insights generated during the POC phase.

03

FINAL SOLUTION DEVELOPMENT AND IMPLEMENTATION

Based on the learnings from the POC, we develop and implement the full solution, ensuring maximum integration and scalability.

SOLUTION CUSTOMIZATION

Tailored AI models configured and trained with the organization’s data to meet the specific demands of the process.

INTEGRATION WITH EXISTING SYSTEMS

Autonomous agents interact seamlessly with existing platforms, processes, and workflows.

FULL-SCALE TESTING

Conducting robust tests to validate performance, security, and solution stability.

04

OPERATIONAL SUPPORT

After implementation, we offer continuous support to maximize results and ensure the solution evolves with the business needs.

TEAM TRAINING

Training employees to operate and extract maximum value from the implemented solution.

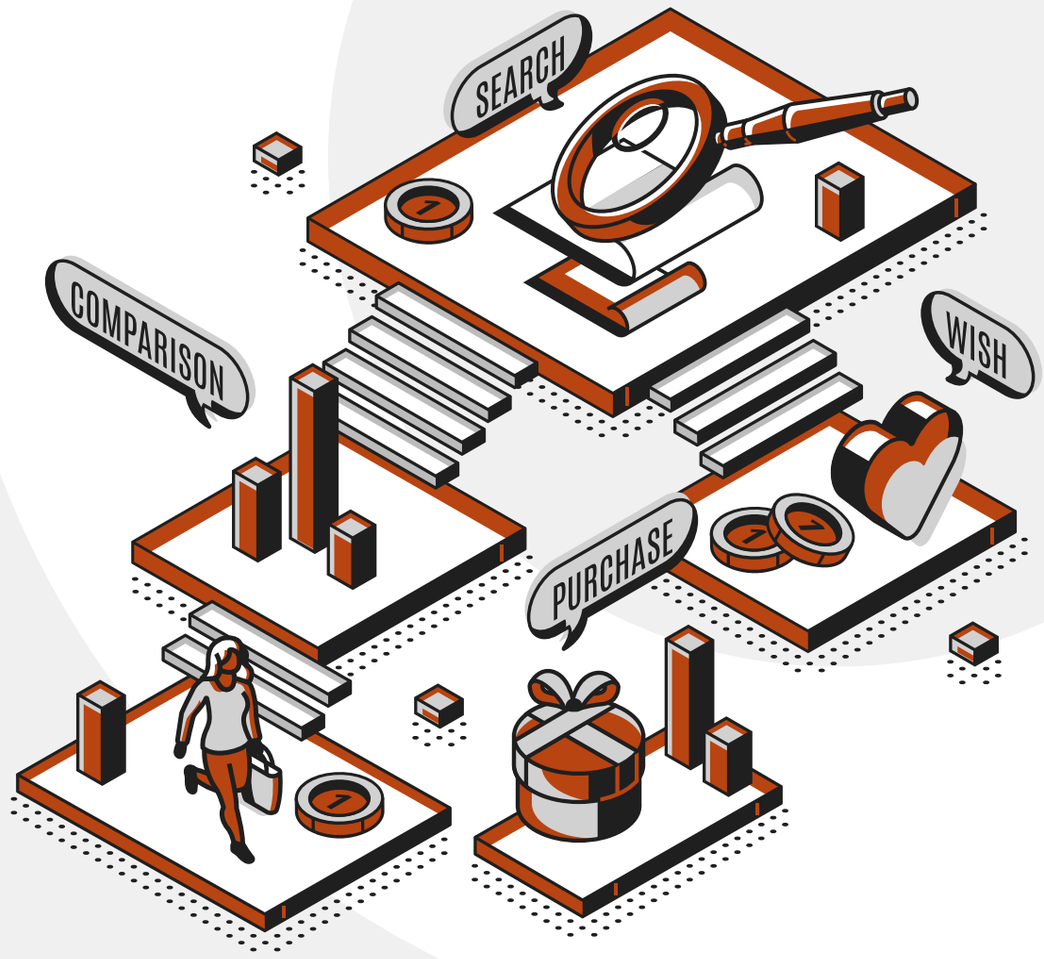
OBSERVABILITY, MAINTENANCE, AND UPDATES

Constant monitoring of autonomous agent performance, applying improvements and updates as needed.

EVOLUTION AND SCALABILITY

Identifying new opportunities for applying autonomous agents in other areas of the organization, expanding the solution's impact.

08 How to Measure the Results of AI Agent Implementation?



BUSINESS METRICS (HIGH-LEVEL KPIS)

COST REDUCTION

Analyze the before and after of adopting autonomous agents, considering labor costs, rework, or resources that were automated.

ADDITIONAL REVENUE OR SALES

Check if there was an increase in sales, upsell/ cross-sell, or conversion rates.

PRODUCTIVITY

Measure the number of tasks completed and error rates over a given period and compare with the previous scenario.

RETURN ON INVESTMENT (ROI)

Calculate whether the increase in revenue or cost reduction exceeds the expenses of implementing, maintaining, and evolving the agent.

SATISFAÇÃO DE USUÁRIOS INTERNOS E EXTERNOS

CUSTOMER SATISFACTION (NPS, CSAT)

If the autonomous agent interacts directly with the public (e.g., a chatbot or recommendation tool), Net Promoter Score (NPS) or customer satisfaction indices can be measured.

EMPLOYEE FEEDBACK

When the agent is used for internal support or direct interaction with the team, it's important to measure how much the teams feel the solution improves their daily tasks or aids in decision-making.

ADOPTION RATE

How many people actually use and trust the autonomous agent once it’s deployed?

PROCESS QUALITY AND RELIABILITY

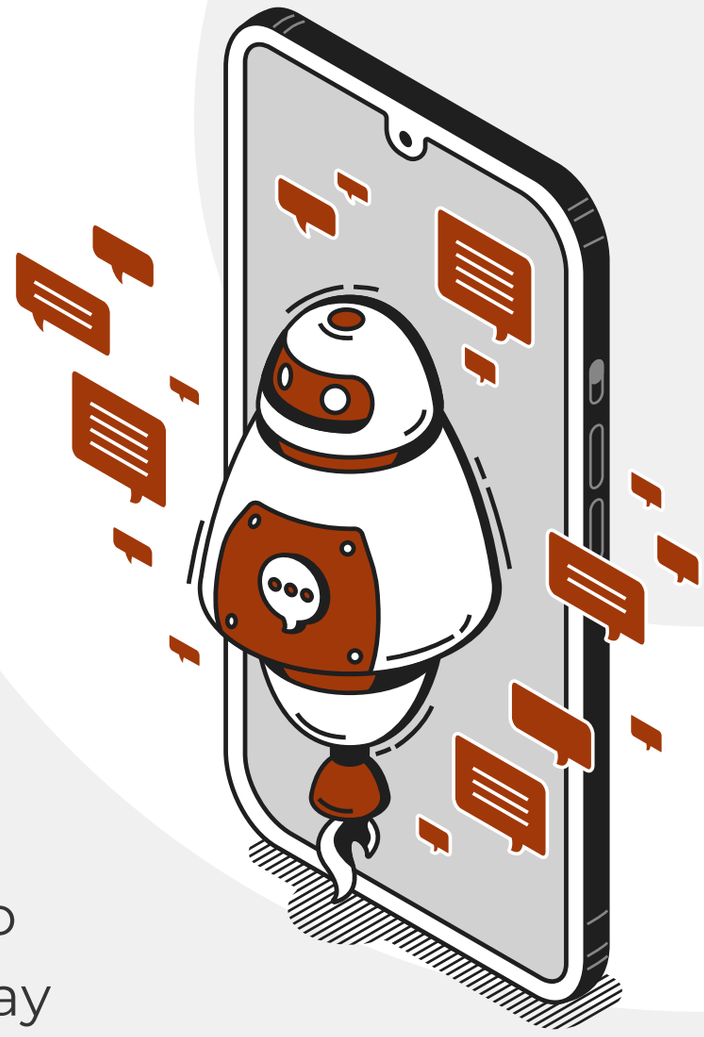
QUALITY OF RESULTS

In process automation tasks, how many exceptions or rework are necessary after the AI agent completes its part?

COMPLIANCE AND LEGAL CONFORMANCE

Monitor whether the AI agent operates according to regulations (LGPD, GDPR, etc.) and does not pose risks of penalties

09 The Future of Automation and Your Business



Automation, driven by AI agents, is becoming increasingly integrated into business processes, transforming the way companies operate.

DEEP INTEGRATION WITH AGENT SYSTEMS

The future of automation lies in creating Agent Systems, where **multiple autonomous agents work together to optimize complex operations**, potentially even reaching the level of strategic management within companies

These systems go beyond automating specific tasks; they will be **capable of interacting with each other and making real-time data-driven strategic decisions.** This will enable greater efficiency and adaptability.

RESKILLING AND CHANGING JOB PROFILES

As automation evolves rapidly, job profiles will undergo significant changes. **Professionals will need to reskill to handle advanced technologies**, focusing on higher-value strategic roles. Repetitive and manual tasks will be delegated to AI agents, **while human employees will concentrate on creative, analytical, and decision-making functions.**

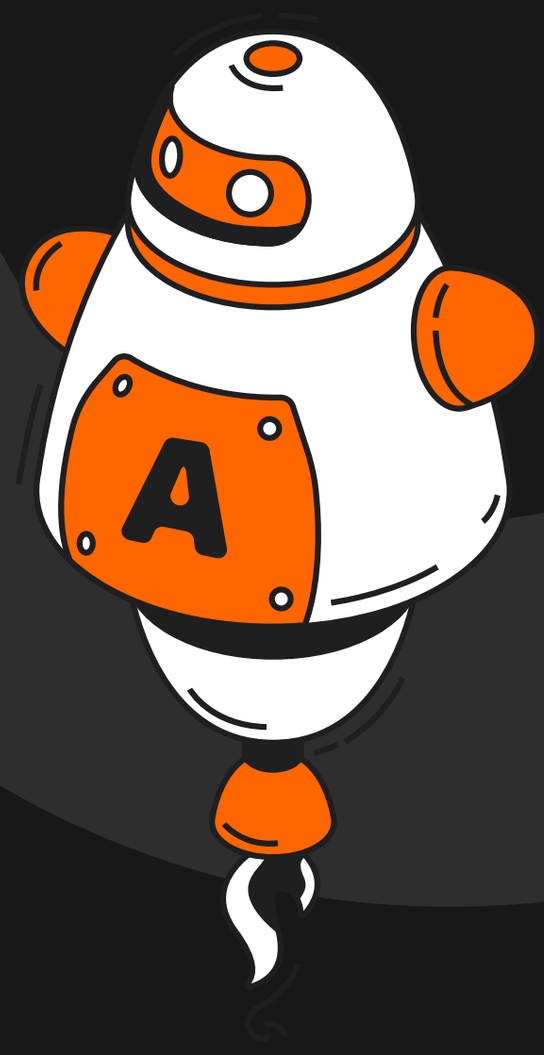
AUTOMATION AS A STRATEGIC FOUNDATION

AI and automation will no longer be seen as isolated, one-off projects; they will become **strategic foundations**, essential for innovation, competitiveness, and value creation. Companies that embrace this vision will be able to:

- Define new ways of working, integrating collaboration between humans and autonomous agents.
- Create sustainable value, developing customized solutions and enriching experiences for customers.
- Compete more efficiently in the market, using data and predictive analytics to make faster and more accurate decisions.

Organizations that adapt their strategies to include automation at their core will not only stay relevant but will also be one step ahead in the business world.

Unlock the Power of AI Agents to Thrive Your Business with Agentic Now!



At Softo, our AI experts are ready to offer customized solutions with artificial intelligence agents, designed to act as digital partners.

Leverage the potential of AI agents to:

01 AUTOMATE COMPLEX PROCESSES

02 GAIN REAL-TIME STRATEGIC INSIGHTS

03 INCREASE OPERATIONAL EFFICIENCY

04 MITIGATE RISKS AND PREDICT SCENARIOS

agentic now The AI Agents Factory

Prosper your business with Softo's Customized Solutions!

Softo is a software house specialized in developing tailor-made solutions. Combining cutting-edge technology, experts, and an agile approach, we help businesses transform complex challenges into impactful innovations.

Additionally, **we integrate AI agents to bring intelligence and automation to your solution**s, enhancing efficiency and creating new opportunities for your business.

Schedule a free consultation and discover how AI agents can become strategic allies for your business growth.

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