

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
 Robotic Process Automation (RPA)	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).
 Intelligent Automation	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).
 Agentic Automation	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.



DEVELOPING USE CASES

After identifying the ways in which agentic AI can transform your business, the next step is to identify likely use cases that support the vision and move the organizational metrics that matter. Start with narrowly defined, high-impact use cases—those that balance business value with implementation complexity and resource constraints. This narrow focus will help demonstrate potential ROI while mitigating the possibility of large-scale failure.



BUILDING A GOVERNANCE FRAMEWORK

A governance framework is essential for managing the complexities and risks associated with agentic AI, addressing not only technical concerns like data protection and security protocols, but also operational risks that could threaten business continuity. Compliance efforts must account for current laws and anticipate future requirements, as the landscape of AI regulations is complex and evolving.

And a [comprehensive governance](#) framework includes more than risk and compliance — it covers ethical and privacy considerations like fairness, transparency, and responsible use, as well as oversight of the technology. Particularly when using an autonomous technology like agentic AI, proper oversight is critical. Organizational leaders must assign decision rights, which dictate the decisions that can be undertaken by the AI and those that must be made by a human.



STEP 3: LAY THE FOUNDATION

Promote trust and responsible use through a comprehensive governance program.

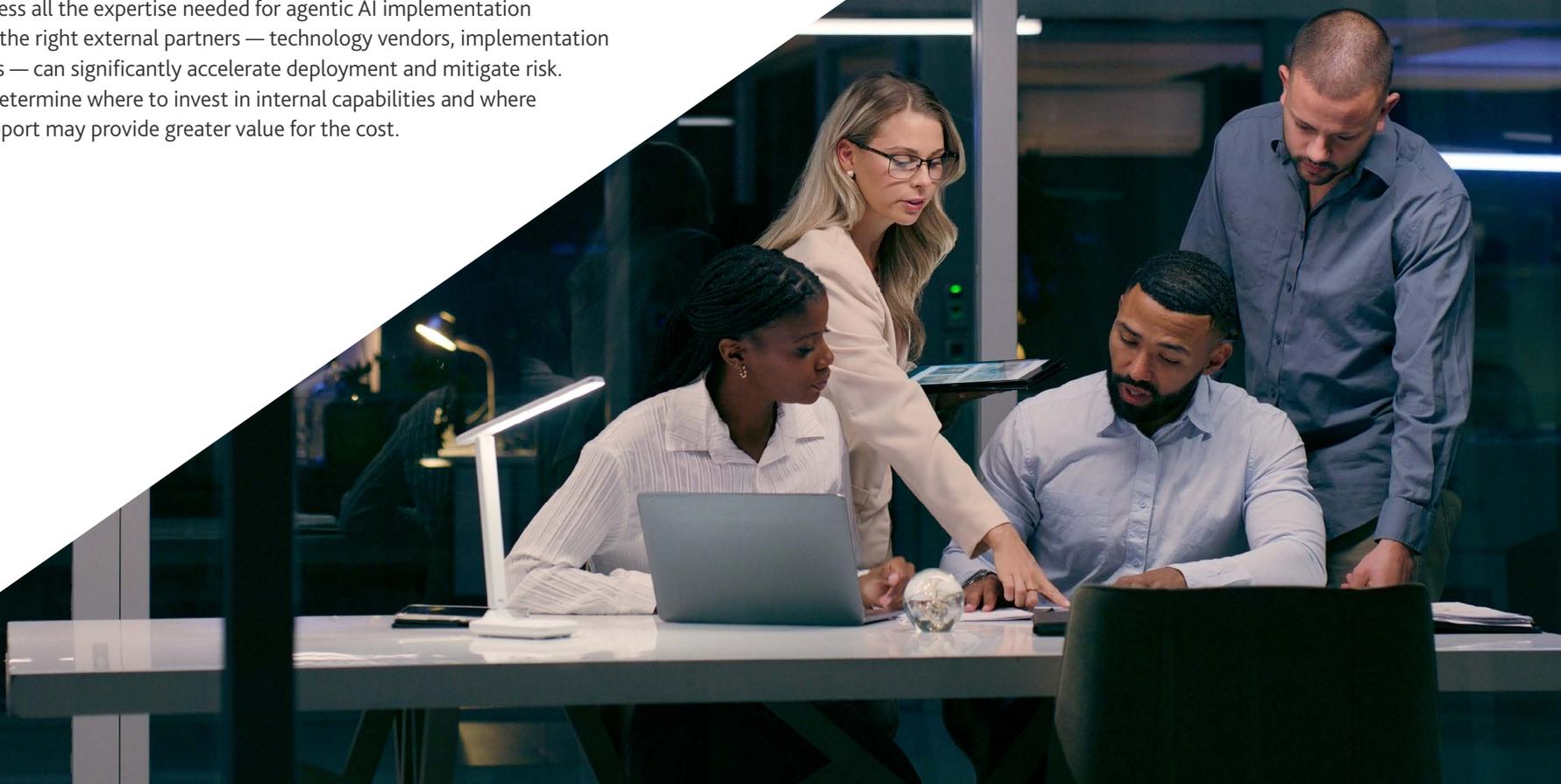


RESOURCE PLANNING

Effective resource planning means carefully assessing and allocating technological and human resources, while establishing the budgets needed to achieve your implementation plans. This means building the technological infrastructure to support your planned implantation and scale as your needs expand. Organizations should also prioritize integration capabilities to enable connection between AI systems and existing enterprise applications.

Despite agentic AI's autonomous capabilities, the human element remains crucial in successful implementation and operation. Organizations must identify the skills needed to develop, implement, and oversee agentic AI systems. A strategic approach to human capital will balance external recruitment with upskilling current employees, providing resources for AI literacy and empowering those who identify interest and potential aptitude in AI-related work.

Few organizations possess all the expertise needed for agentic AI implementation in-house, which is why the right external partners — technology vendors, implementation specialists, and advisors — can significantly accelerate deployment and mitigate risk. Organizations should determine where to invest in internal capabilities and where bringing in external support may provide greater value for the cost.



Agentic AI Implementation

PILOT PROGRAM

Successful implementation begins with a pilot program designed to demonstrate the feasibility and potential impact of your agentic AI strategy. Select a use case with high projected ROI, while remaining mindful of resource limitations and practical constraints.

The right pilot program will be a small-scale implementation that helps prove the technology's capabilities and demonstrates tangible value to stakeholders. It will test organizational readiness, validate implementation strategies, and uncover potential challenges that may not be apparent during the planning stages — all before committing to full-scale deployment.

SCALING AND INTEGRATION

After the pilot program, an expansion strategy is key to fostering successful implementation across the wider organization. A phased rollout approach allows for controlled scaling while limiting disruption to existing operations. As the agentic AI program scales, organizations must allocate the necessary resources and budget to promote sustainable growth while maintaining quality and security.

Success hinges on the AI system's ability to work seamlessly with existing technology systems rather than functioning as an isolated capability. This requires embedding AI capabilities directly into established workflows and making sure AI agents are compatible with legacy infrastructure. Perhaps most importantly, organizations must establish smooth information exchange between systems, as AI agents depend on access to high-quality, relevant data flowing across the enterprise to be effective.



STEP 4: PREPARE YOUR PEOPLE

Communicate both the “why” and “how” behind your approach, offering the clarity and resources to empower employee success.

WORKFORCE ADOPTION

Agentic AI implementation depends as much on people as it does on technology. A comprehensive approach to workforce adoption addresses four key dimensions: change management, skills development, cultural transformation, and ongoing support.



Change Management

- ▶ Transparent communication about the organization's AI vision and how it will impact employees' roles and responsibilities
- ▶ Employee involvement early and often in the planning process to transform potential resistance into valuable input
- ▶ Cultivate AI champions who understand agentic AI and how it fits into employee workflows, bridging the gap between technology and end-users

Skills Development

- ▶ Comprehensive upskilling strategy addressing both technical (data literacy, AI tool proficiency) and adaptive (critical thinking, creativity, emotional intelligence) skills
- ▶ Training and development programs that account for different roles, existing skill levels, and professional goals
- ▶ Experiential learning, such as workshops and simulation exercises, that allow employees to experiment without fear of making mistakes

Cultural Transformation

- ▶ Culture of continuous learning that defines success to recognize both human and AI contributions and promotes human-AI collaboration
- ▶ Information-sharing on use cases and best practices, shared across title levels and departments
- ▶ Empathy and honesty to address AI anxiety and assuage fears of job displacement by showcasing how AI is evolving, not eliminating roles, increasing job satisfaction, and creating new opportunities for meaningful work

Ongoing Support

- ▶ AI help desks to provide on-the-job support and guidance as the technology develops and new use cases arise
- ▶ Mentoring and community support that bring together employees with diverse experiences and skills to accelerate learning and innovation
- ▶ Regular feedback channels to address emerging challenges, capture employee sentiment, and gauge perceived value of AI systems

BRIDGE THE AI SKILLS GAP

Equip your team with the knowledge needed to leverage AI effectively and confidently. [Visit the BDO AI Academy.](#) ▶



ONGOING RISK MANAGEMENT

As agentic AI expands across the organization, regular technical and compliance audits can help ensure systems operate as intended. Security controls must be continuously updated to address both current and emerging threats, with clear protocols for resolving technical and operational issues as they arise.

Compliance monitoring should not only encompass internal policies and operations, but also those of all partners and external vendors. Compliance teams must also keep track of new and emerging regulations, as well as industry standards. This proactive approach helps organizations anticipate and adapt to changing requirements, rather than playing catch-up after new regulations are implemented.

CONTINUOUS IMPROVEMENT

Implementation doesn't end with deployment — it transitions to a phase of continuous improvement. From an infrastructure perspective, this means regular system maintenance and updates to support ongoing technical performance, as well as targeted performance improvement initiatives to improve efficiency, mitigate risk, and achieve greater business outcomes.

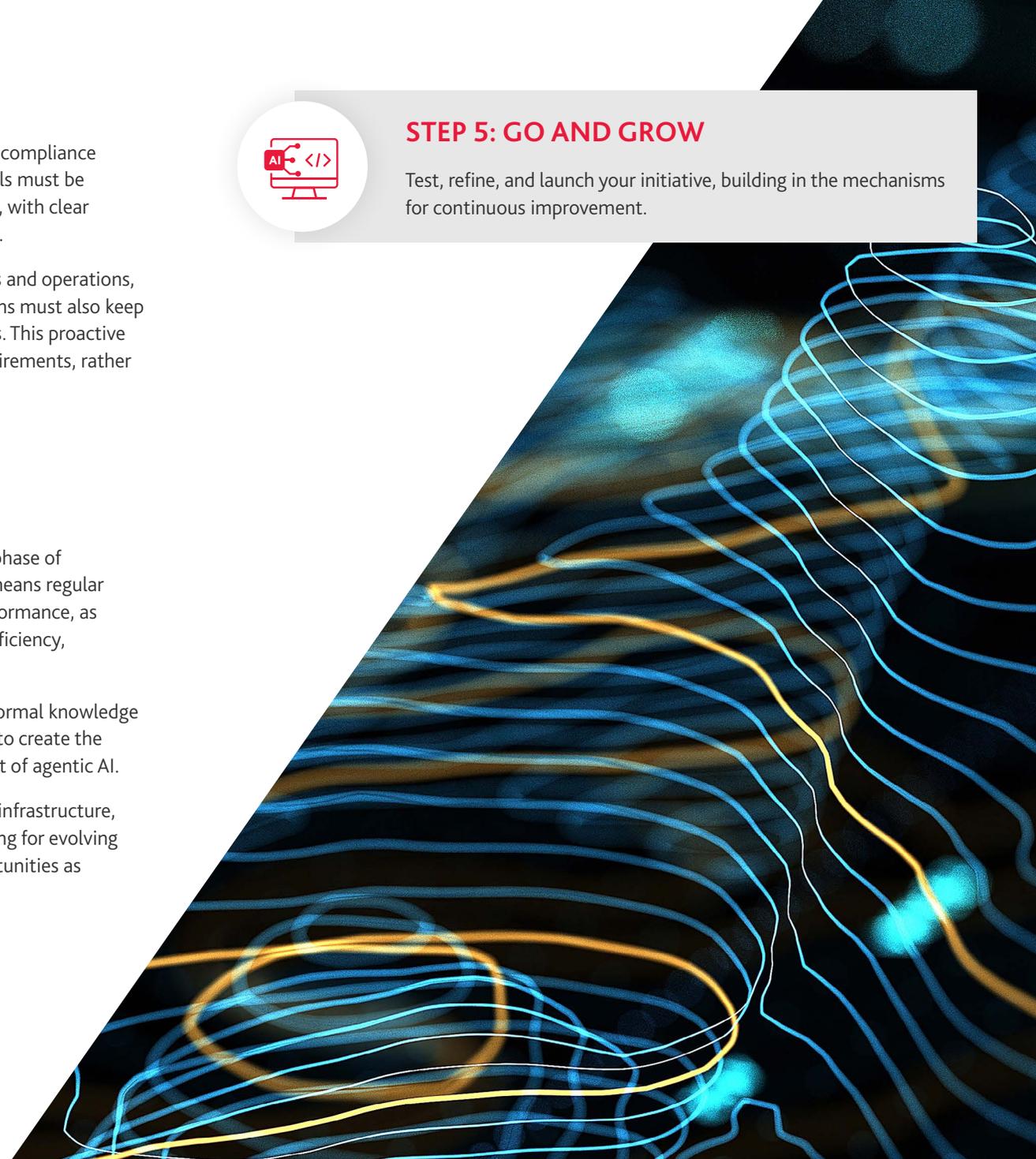
For the workforce, continuous improvement is unlocked through a formal knowledge management program, which captures learnings and best practices to create the resources and training programs that help employees make the most of agentic AI.

Continuous improvement requires organizations to regularly assess infrastructure, workforce, and operational performance. By anticipating and planning for evolving AI capabilities and needs, organizations can quickly seize new opportunities as agentic AI evolves into the future.



STEP 5: GO AND GROW

Test, refine, and launch your initiative, building in the mechanisms for continuous improvement.



Conclusion

Agentic AI represents the next frontier in business transformation — autonomous systems that can make decisions and execute complex workflows with minimal human intervention. Organizations must approach this powerful technology with strategic vision and responsible governance, developing AI agents that create business value while retaining human values at their core.

A strong foundation of people, processes, technological infrastructure and governance is essential to agentic AI implementation. The adopters who can sustain their competitive edge will be those who treat agentic AI as an ongoing journey, not a one-time project, laying out the roadmap and resources that set up their organizations for continuous improvement and long-term success.





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