

COMMUNICATE

Intermediate

35 MIN

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Stand up a benefits and HR self-service chatbot.

Build a Copilot Studio agent that answers employee benefits and policy questions directly from HR SharePoint content.

MICROSOFT 365

SharePoint

WORKS WITH

Copilot Studio

Business Outcome

HR fields fewer repetitive benefits questions, and employees get accurate answers instantly instead of waiting on an email reply.

Workflow Steps

Step 1: Audit the SharePoint source content first

SharePoint

Open the library's file list sorted by Modified date and remove or archive anything superseded — old plan-year PDFs, draft policies, duplicate copies with different version numbers in the filename.

An agent can't tell a current document from an outdated one just by looking at it; it will cite whichever one it finds with the same confidence either way.

Step 2: Scope the agent to the HR site

Copilot Studio

In Copilot Studio, point the agent at the specific SharePoint site or library holding benefits and policy documents, and restrict it from pulling in unrelated content.

PROMPT

When answering a benefits question, cite the specific policy document and section you're drawing from. If a question falls outside what's covered in the source documents, say so and route to an HR contact instead of guessing.

Step 3: Test it against real employee questions

Copilot Studio

Run the agent through a batch of actual questions HR gets asked often — enrollment deadlines, dependent coverage, leave policy — and check each answer against the source document it cites.

Step 4: Set the escalation path

Copilot Studio

Configure what happens when the agent can't answer confidently: route to a named HR contact or ticket queue rather than letting it guess at a policy detail.

Step 5: Launch and monitor early usage

Copilot Studio

Publish it to one department or office location first, and use Copilot Studio's analytics/transcript view to read a sample of real conversations each week.

Look specifically for the agent answering confidently on something not actually in its source documents, and tighten its instructions or add the missing document before expanding access.

✓ Check the work

- Spot-check answered questions against the actual policy document cited — confirm the citation is real and accurate.
- Confirm the escalation path actually fires when a question falls outside the source content.
- Recheck the source SharePoint content periodically so answers don't go stale after a policy update.

Expected Outcome

A working chatbot that answers common benefits and policy questions, sourced and cited from your HR SharePoint content.

Want help rolling this out across your team? **Go to Liminals.Tech** 📄