

AUTOMATE

Advanced

60 MIN

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Build a smart onboarding agent in Copilot Studio.

Build a Copilot Studio agent that gives new hires personalized onboarding steps and answers their questions in real time, instead of a static checklist nobody updates.

MICROSOFT 365

SharePoint

WORKS WITH

Copilot Studio

Business Outcome

New hires with a responsive onboarding guide instead of a static document that goes stale after the first policy change.

Workflow Steps

Step 1: Map the onboarding steps that actually vary by role

SharePoint

Build two lists side by side: universal steps everyone does regardless of role (benefits enrollment, IT setup, company orientation) and role-specific steps that differ (tool access, team-specific training, shadowing).

The agent's actual value is in personalizing that second list correctly – if everything's treated as universal, you've built an expensive static checklist.

Step 2: Ground the agent in current HR policy and onboarding documents

Copilot Studio

Connect it to the actual current versions – an onboarding agent answering from outdated policy creates more confusion than a static document would.

Step 3: Define what it escalates to a person

Copilot Studio

In the agent's instructions, list the specific sensitive topics by name – benefits elections, accommodation requests, anything mentioning a personal or medical circumstance – and require it to route those directly to an HR contact rather than attempting an answer, confident or not.

Step 4: Pilot it with one onboarding cohort before full rollout

Copilot Studio

Have the pilot cohort's HR partner review what the agent got right and wrong before relying on it for every new hire.

✓ Check the work

- The agent's grounding documents are current, not a stale snapshot.
- Sensitive topics correctly escalate to a person instead of getting an automated answer.
- Pilot cohort feedback was reviewed and acted on before full rollout.

Expected Outcome

An onboarding agent new hires can ask questions directly, giving personalized steps and current answers.

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