

MEET **Advanced** 45 MIN · UPDATED 2026-09-30

Generate a project workback schedule from a meeting transcript.

Have the Planner agent pull decisions and deadlines from a kickoff transcript and turn them into a schedule with dependencies.

MICROSOFT 365

Planner

Teams

WORKS WITH

Copilot

Business Outcome

A project schedule with real dependencies exists the same day as kickoff, instead of days later once someone manually builds it.

Workflow Steps

Step 1: Capture the planning meeting transcript

Teams

Get the transcript from the kickoff or planning session where milestones, deliverables and rough dates were discussed.

Step 2: Ask the Planner agent to build the workback schedule

Copilot

Hand the Planner agent the full transcript rather than a summary of it – the specific wording around sequencing ("we can't start the migration until the audit finishes") is exactly what it needs to catch to infer a real dependency, and a paraphrase tends to lose that connective detail.

PROMPT

Build a workback schedule from this kickoff transcript. Identify each deliverable, the target date mentioned, and what has to finish before it can start. Flag any deliverable with no stated dependency or owner.

Step 3: Fill in the gaps the agent flagged

Teams

For deliverables with no clear owner or dependency in the transcript, go back to the project lead rather than guessing – a wrong dependency chain compounds into a wrong schedule.

Step 4: Sanity-check the dependency chain

Planner

Walk through the schedule end-to-end and confirm the sequencing makes sense – a task the agent placed as dependent on another may actually be able to run in parallel.

Step 5: Publish to Planner and share

Planner and Teams

Push the confirmed schedule into Planner with owners and dates, then share the board link in the project's Teams channel.



✓ Check the work

- Confirm every date in the schedule traces back to something actually said in the transcript, not inferred typical timelines.
- Verify dependency order with the task owners before treating it as fixed.
- Check that no deliverable is missing an owner in the final Planner board.

Expected Outcome

A Planner workback schedule with tasks, dependencies and target dates derived from the kickoff decisions.

Want help rolling this out across your team? [Go to Liminals.Tech](#) ■