

AUTOMATE **Advanced** 75 MIN · UPDATED 2026-09-30

Orchestrate multiple agents for customer onboarding.

Coordinate specialized Copilot Studio agents across entity identification, provisioning, welcome sequencing, and engagement monitoring to run onboarding end-to-end.

MICROSOFT 365

SharePoint

Teams

Outlook

WORKS WITH

Copilot Studio

Business Outcome

Consistent, fast onboarding at scale without a person manually shepherding every new customer through each stage.

Workflow Steps

Step 1: Map the stages before building agents

SharePoint

Draw this out as an actual flowchart or numbered list in a SharePoint document — each discrete stage (verify the account/entity, provision access, send the welcome sequence, monitor early engagement), what "done" looks like for each, and what gets passed to the next stage.

Treat this document as the spec the orchestrator in step 3 is built against, not something worked out improvisationally while wiring agents together.

Step 2: Build or reuse a scoped agent per stage

Copilot Studio

Each agent should do one job well: an identification agent that verifies the new customer's details against your CRM/SharePoint record, a provisioning agent that requests the right access, a welcome agent that drafts and sends the onboarding sequence via Outlook, and a monitoring agent that flags accounts showing low early engagement.

Step 3: Build the orchestrator

Copilot Studio

Configure a top-level agent (or Power Automate flow) that passes the customer record from one stage agent to the next, only advancing when the prior stage reports success, and logging status at each handoff.

PROMPT

A new customer record has passed identification verification. Trigger the provisioning agent with their account tier, confirm provisioning succeeded, then trigger the welcome agent to send the tier-appropriate onboarding sequence.

Step 4: Build in a human checkpoint for exceptions

Teams

Any stage that fails or returns ambiguous results should stop the chain and notify a person in Teams with the full context, rather than letting a downstream agent act on an incomplete handoff.

✓ Check the work

- Trace a handful of onboarding records through all four stages and confirm each handoff carried the correct, complete data forward.
- Confirm failed stages actually halt the chain instead of silently continuing.
- Review engagement-monitoring flags against real usage data to make sure "low engagement" alerts are catching genuine risk, not noise.



Expected Outcome

A new customer record that moves through identification, provisioning, welcome messaging, and early engagement tracking with a status visible at every stage.

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