

AUTOMATE

Intermediate

30 MIN

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Simplify an internal job transition with Copilot.

Use Copilot to pull together the paperwork, access changes, and handoff plan for an internal transfer instead of tracking it across separate checklists.

MICROSOFT 365

SharePoint

WORKS WITH

Copilot

Business Outcome

Internal transfers completed with nothing falling through the cracks between the old and new role.

Workflow Steps

Step 1: Gather the old and new role's requirements

SharePoint

Pull up the documented access list, equipment, and responsibilities for both the old and new role — if either role's requirements aren't already written down somewhere, that's worth fixing now, since the transition plan can only cover the gap between two things that are both actually documented.

Step 2: Ask Copilot to draft the transition plan

Copilot

Have it list every access change, handoff task, and paperwork item needed, based on the two roles' actual requirements.

PROMPT

This employee is moving from [old role] to [new role]. Based on each role's access and responsibilities, draft a complete transition checklist covering system access to revoke and grant, handoff tasks, and required paperwork.

Step 3: Confirm the access changes with IT and the employee's managers

SharePoint

A transition plan is only useful if the access changes actually get executed – route them to whoever owns provisioning, don't just leave them as a checklist.

Step 4: Track the plan to completion, not just creation

SharePoint

Follow up that every item on the checklist actually got done, especially access revocation on the old role.

✓ Check the work

- Every access change was confirmed executed, not just listed.
- The employee's manager in the new role confirmed the handoff was complete.
- Old-role access was actually revoked, not left active alongside the new role's.

Expected Outcome

A single transition plan covering access changes, handoff tasks, and paperwork, tracked to completion.

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