

AI+ Microsoft 365 Copilot Sales Specialty (1 Days)

Program Detailed Curriculum

Executive Summary

The AI+ Microsoft 365 Copilot Sales Specialty™ certification equips sales professionals and sales managers with the knowledge and skills to apply artificial intelligence and Microsoft 365 Copilot across modern sales environments. The program explores AI foundations, Microsoft 365 Copilot, prompt engineering, sales productivity, customer engagement, prospecting, lead generation, opportunity management, sales analytics, forecasting, decision intelligence, responsible AI, governance, workflow automation, and AI-powered sales transformation.

Learners develop practical understanding of how AI and Copilot support customer research, communication, meetings, proposals, sales data analysis, pipeline management, forecasting, account strategy, and sales automation. The certification emphasizes practical application, human validation, data quality, security, governance, responsible AI, measurable adoption, and human-AI collaboration across the sales lifecycle.

Prerequisites :

- **AI Fundamentals:** Understand basic AI concepts, machine learning, generative AI, large language models, and AI applications.
- **Sales Fundamentals:** Understand the sales lifecycle, prospecting, lead qualification, customer engagement, opportunity management, account management, pipeline management, and forecasting.
- **Microsoft 365 Literacy:** Understand common Microsoft 365 applications such as Word, Excel, PowerPoint, Outlook, Teams, and conversational Copilot experiences.
- **Data and CRM Awareness:** Understand customer and opportunity data, CRM concepts, spreadsheets, sales metrics, reporting, and the importance of data quality.
- **Responsible AI Understanding:** Understand AI accuracy, privacy, security, governance, human validation, and responsible use of AI in customer-facing and business decision workflows.

Module 1

AI Fundamentals for Modern Sales

1.1 Introduction to Artificial Intelligence

Understand the foundations of Artificial Intelligence and its evolution into systems that learn from data, understand language, generate content, analyze information, and support decisions. Learners will explore AI, machine learning, deep learning, generative AI, large language models, foundation models, multimodal AI, AI agents, and the capabilities and limitations relevant to modern sales.

1.2 Generative AI in Sales

Explore how Generative AI supports modern sales through content generation, personalization, customer and market research, communication, productivity, and workflow assistance. Learners will understand how AI augments sales professionals while human judgment, relationship management, negotiation, empathy, domain expertise, verification, and accountability remain central to effective sales work.

1.3 AI-Powered Sales Lifecycle

Learn how AI can support the sales lifecycle from lead generation and prospecting through customer engagement, opportunity management, forecasting, retention, and expansion. Learners will examine how AI helps process sales information, identify patterns, generate recommendations, and improve decision support without turning the sales process into fully autonomous decision-making.

1.4 AI Sales Use Cases

Explore practical AI use cases including sales emails and communications, customer research, meeting preparation, proposals and presentations, and sales reporting and analysis. Learners will understand how Generative AI can transform approved information into useful sales outputs while customer-facing claims, commercial information, and business interpretations remain subject to human review.

1.5 AI Limitations and Challenges

Understand the limitations and risks that can affect AI-supported sales, including hallucinations, inaccurate information, bias, reliability issues, privacy and confidentiality concerns, and over-reliance on automated outputs. Learners will explore validation, data-handling practices, human oversight, and other controls that help sales teams use AI responsibly.

1.6 Case Studies

Analyze realistic enterprise sales scenarios that demonstrate how AI can be integrated into customer research, communication, opportunity management, reporting, forecasting, and engagement workflows. Learners will examine business objectives, implementation choices, benefits, risks, data requirements, and the role of human judgment in AI-enabled sales transformation.

Module 2

Microsoft 365 Copilot Fundamentals for Sales

2.1 Introduction to Microsoft 365 Copilot

Understand Microsoft 365 Copilot as an AI-powered productivity capability that combines large language models, Microsoft 365 applications, Microsoft Graph, organizational data, grounding, permissions, and human judgment. Learners will explore how Copilot uses authorized work context to support drafting, summarization, analysis, presentation development, email review, meeting support, and other sales activities.

2.2 Microsoft 365 Copilot Ecosystem

Explore Copilot across Microsoft Word, Excel, PowerPoint, Outlook, Teams, and Copilot Chat. Learners will understand how each experience supports different sales tasks such as document creation, data analysis, customer presentations, email communication, meeting collaboration, research, planning, and conversational knowledge work within the Microsoft 365 environment.

2.3 Copilot for Sales Professionals

Learn how Copilot supports sales communication, customer research, meeting preparation, documentation, customer presentations, and everyday productivity. Learners will explore how AI can organize, summarize, transform, and prepare information while the salesperson remains responsible for customer relationships, accuracy, strategic judgment, and final decisions.

2.4 Working with Organizational Information

Understand how sales information is distributed across emails, conversations, documents, meetings, spreadsheets, and other organizational sources. Learners will explore how Copilot can summarize, compare, explain, and transform authorized information, and how sales professionals should verify generated information before using it in customer-facing communication or business decisions.

2.5 Copilot and Microsoft Sales Ecosystem

Explore how Microsoft 365 Copilot can work alongside Dynamics 365 Sales, Power Platform, and Copilot Studio in an integrated sales environment. Learners will understand the roles of CRM, AI-assisted productivity, automation, analytics, and customizable agents, together with the importance of data quality, permissions, approval controls, security, governance, and human decision-making.

2.6 Case Studies

Analyze practical enterprise scenarios that show how Microsoft 365 Copilot can support sales productivity and customer engagement across communication, meetings, documents, analysis, and follow-up. Learners will examine implementation approaches, information requirements, validation practices, adoption considerations, and how Copilot can reduce information-processing effort without replacing professional sales judgment.

Module 3

Prompt Engineering for Sales with Microsoft Copilot

3.1 Fundamentals of Sales Prompt Engineering

Understand how effective prompts define the business objective, context, role or persona, instructions, constraints, and expected output for sales tasks. Learners will explore how clear prompt design improves the relevance and controllability of AI-generated emails, research, meeting preparation, proposals, summaries, and other sales content.

3.2 Basic Prompting Techniques

Explore zero-shot, few-shot, role-based, persona-based, context-based, and template-based prompting for sales. Learners will understand when each technique is useful, how techniques can be combined, and how examples, professional perspectives, customer context, and reusable structures can improve recurring AI-assisted sales activities.

3.3 Advanced Prompting Techniques

Learn advanced approaches including prompt refinement, iterative prompting, prompt chaining, scenario-based prompting, comparative prompting, and response evaluation. Learners will use these techniques to manage complex sales tasks, improve initial responses, break work into connected stages, compare alternatives, and produce more controlled and useful outputs.

3.4 Sales-Specific Prompt Patterns

Explore reusable prompt patterns for prospect research, lead qualification, sales emails, meeting preparation, proposal generation, and objection handling. Learners will understand what information each task requires, how instructions should be structured, what boundaries should be applied, and where verified customer information and human review are needed.

3.5 Prompt Evaluation and Optimization

Understand how to evaluate prompts and AI responses for relevance, accuracy, completeness, consistency, tone, personalization, and reliability. Learners will explore methods for identifying missing information, unsupported claims, hallucinations, weak personalization, and other quality issues, then use evaluation results to improve prompts and outputs.

3.6 Sales Prompt Library

Learn how to build and maintain a structured library of reusable prompts for prospecting, customer communication, meetings, proposals, sales analysis, and follow-up. Learners will explore prompt standardization, testing, quality control, maintenance, and team adoption so recurring AI-assisted sales activities remain consistent and adaptable.

3.7 Case Studies

Analyze practical prompt-engineering scenarios focused on personalized sales outreach and structured account research. Learners will apply verified customer information, clear objectives, appropriate constraints, structured outputs, and human validation to create useful sales content while avoiding unsupported assumptions and invented details.

Module 4

Copilot for Sales Productivity and Customer Engagement

4.1 Copilot for Outlook

Understand how Copilot in Outlook supports email summarization, drafting, rewriting, personalized communication, follow-up generation, thread analysis, and action-item extraction. Learners will explore how to work efficiently with customer conversations while verifying important dates, requirements, commitments, pricing, technical details, and other commercially significant information before sending messages.

4.2 Copilot for Microsoft Teams

Explore how Copilot in Microsoft Teams supports meeting preparation, meeting summaries, requirement extraction, decisions, action items, follow-up planning, and meeting-based sales insights. Learners will understand how to convert customer discussions into structured information while validating participant statements, deadlines, decisions, commitments, and other information that affects the sales process.

4.3 Copilot for Microsoft Word

Learn how Copilot in Word assists with proposals, customer briefs, account plans, sales reports, executive summaries, meeting documentation, and document refinement. Learners will explore AI-assisted drafting, organizing, summarizing, and rewriting while maintaining source control, version awareness, and human approval for pricing, commitments, technical claims, and other important business content.

4.4 Copilot for Microsoft PowerPoint

Explore how Copilot in PowerPoint supports customer presentations, proposal presentations, executive briefings, presentation refinement, speaker notes, and summaries. Learners will understand how to transform reliable source material into audience-appropriate visual narratives while preserving business meaning and validating product claims, customer information, statistics, and commercial statements.

4.5 Copilot for Microsoft Excel

Understand how Copilot in Excel supports sales data analysis, trend identification, KPI analysis, revenue analysis, customer segmentation, and salesperson performance evaluation. Learners will explore natural-language analysis, formula assistance, and interpretation of structured data while recognizing that data quality, calculation accuracy, and business context must be checked before decisions are made.

4.6 Integrated Customer Engagement Workflow

Learn how Copilot can support a connected customer engagement workflow across research, communication, meeting preparation, meeting analysis, proposal development, and follow-up. Learners will examine how information moves between Microsoft 365 applications and where validation is required so errors or unsupported assumptions do not propagate across later stages of the customer relationship.

4.7 Case Studies

Analyze realistic sales scenarios involving Copilot-enabled customer engagement and AI-supported meeting workflows. Learners will examine how Copilot can improve preparation, communication, information processing, and follow-up while sales professionals retain responsibility for accuracy, customer relationships, commercial decisions, and appropriate next actions.

Module 5

Copilot for Prospecting, Lead Generation and Opportunity Management

5.1 AI-Powered Prospecting

Understand how AI supports prospecting through Ideal Customer Profile development, account research, prospect research, industry and market analysis, decision-maker identification, and pain-point discovery. Learners will explore evidence-based approaches that help focus sales attention while treating inferred needs as hypotheses to validate through customer discovery rather than confirmed facts.

5.2 Lead Generation and Qualification

Explore AI-assisted lead generation, qualification, lead scoring, prioritization, segmentation, and nurturing. Learners will understand how customer and prospect information can support decisions about where to focus sales effort while recognizing that scores and recommendations depend on data quality, qualification criteria, business rules, and human interpretation.

5.3 Personalized Sales Engagement

Learn how Generative AI supports personalized outreach, cold emails, value propositions, pain-point messaging, follow-up strategies, and objection handling. Learners will explore how meaningful personalization connects verified customer evidence with relevant business value while avoiding invented claims, unsupported capabilities, inappropriate commitments, and communication that does not reflect the actual customer relationship.

5.4 Opportunity Management

Understand AI-assisted opportunity identification, qualification, summarization, health analysis, deal-risk detection, and next-best-action recommendations. Learners will explore how AI can interpret information from CRM records, emails, meetings, proposals, requirements, and activity history while keeping qualification, commercial decisions, relationship judgment, and key actions under human control.

5.5 Account Management

Explore how AI supports account planning, customer relationship analysis, cross-selling, upselling, retention, expansion, and whitespace identification. Learners will understand how customer strategy, product usage, relationship strength, emerging needs, and business direction can inform account development while ensuring expansion ideas are connected to customer value and verified needs.

5.6 Sales Pipeline Management

Learn how AI can support pipeline analysis, gap identification, deal prioritization, sales activity analysis, opportunity progression, stalled-deal detection, and closing readiness. Learners will explore how pipeline data and activity patterns can improve management visibility while AI-generated recommendations remain subject to validation before they influence management actions or forecasts.

5.7 Case Studies

Analyze practical cases involving AI-powered enterprise prospecting and Copilot-supported strategic account management. Learners will examine how AI helps sales professionals interpret information, identify potential opportunities, prepare actions, and support decisions while maintaining evidence-based reasoning, customer discovery, human judgment, and responsible use of sales data.

Module 6

Copilot for Sales Analytics, Forecasting and Decision Intelligence

6.1 Sales Data and Key Performance Indicators

Understand the role of structured and unstructured sales data and how Key Performance Indicators convert data into meaningful measures of business performance. Learners will explore pipeline value, weighted pipeline, pipeline velocity, revenue growth, conversion measures, customer metrics, productivity indicators, and the importance of reliable data for AI-supported analysis and decision-making.

6.2 Copilot for Excel Sales Analysis

Explore how Copilot in Excel supports sales data summarization, trend and anomaly identification, revenue analysis, product and regional analysis, salesperson performance, and natural-language exploration of large datasets. Learners will also examine data preparation, duplicate and missing data issues, consistent labels, valid calculations, and the difference between observed results and possible explanations.

6.3 AI-Assisted Sales Forecasting

Learn the foundations of pipeline and revenue forecasting, including historical trends, forecast accuracy, scenario analysis, and the use of current sales information to estimate future outcomes. Learners will explore weighted pipeline, forecast error, percentage error, and best-case, base-case, and worst-case scenarios while recognizing that a forecast is an estimate rather than a target or guarantee.

6.4 Power BI for Sales Intelligence

Understand how Power BI brings sales data together through reports, dashboards, KPI visualizations, filters, and AI-assisted insights. Learners will explore how dashboards can support questions about sales performance, pipeline health, revenue, customers, products, and regions, with a focus on decision-oriented design, clear interpretation, and validation of important findings.

6.5 Sales Decision Intelligence

Explore Sales Decision Intelligence as a combination of business intelligence, analytics, AI, and human expertise that supports better sales decisions. Learners will examine sales trends, pipeline risk, high-value accounts, revenue opportunities, next-best actions, and data-driven recommendations while interpreting AI-generated insights alongside business knowledge, market conditions, and organizational strategy.

6.6 Executive Sales Reporting

Learn how detailed sales information can be transformed into concise, decision-oriented reporting for senior management. Learners will explore sales performance reports, executive summaries, forecast reports, regional and product reporting, management insights, and the connection between findings, business implications, and recommended actions.

6.7 Case Studies

Analyze realistic cases involving AI-powered sales forecasting and the combination of dashboards, analytics, and AI-supported decision intelligence. Learners will examine how organizations use data, forecasting, visualization, risk detection, opportunity identification, and human judgment to improve sales planning and management decisions.

Module 7

Responsible AI, Security, Governance and Copilot Adoption

7.1 Responsible AI for Sales

Understand Responsible AI principles for sales, including fairness, transparency, accountability, reliability, privacy, explainability, and human oversight. Learners will explore how these principles apply throughout the AI lifecycle and how sales organizations can create business value while protecting customers, employees, organizational interests, and professional accountability.

7.2 AI Risks in Sales

Explore risks such as hallucinations, incorrect customer information, biased recommendations, misleading AI-generated content, automation bias, and over-reliance on AI outputs. Learners will examine risk-based validation and determine where customer-facing communication, forecasts, proposals, pricing, contractual statements, and other higher-impact activities require stronger human review.

7.3 Data Privacy and Security

Learn how AI-enabled sales workflows affect customer data protection, confidential sales information, access permissions, secure Copilot use, data leakage, and prompt injection. Learners will explore least-privilege access, role-based controls, appropriate sharing, and the distinction between information a user can access and information that is appropriate to share for a specific business purpose.

7.4 Microsoft 365 Copilot Governance

Understand governance for Microsoft 365 Copilot through identity and access controls, organizational permissions, information protection, compliance, audit and monitoring, AI policies, and data classification. Learners will explore how governance enables productive Copilot use while managing risks related to information access, privacy, security, compliance, and responsible organizational behavior.

7.5 Ethical AI-Powered Sales

Explore ethical AI use in customer communication, personalization, data processing, recommendations, and commercial decision support. Learners will examine honesty, fairness, respect, transparency, customer trust, responsible data use, and human decision authority so AI supports sales activity without weakening professional responsibility or appropriate customer treatment.

7.6 Copilot Adoption in Sales Organizations

Learn how organizations can prepare for Copilot adoption through readiness assessment, role-based training, change management, pilot implementation, adoption strategy, and measurement. Learners will explore adoption, productivity, quality, and business-outcome metrics and understand why meaningful business improvement matters more than usage volume alone.

7.7 Case Studies

Analyze realistic scenarios involving responsible AI implementation and secure Copilot adoption in sales organizations. Learners will examine governance, permissions, data protection, customer communication, human oversight, employee training, monitoring, adoption measurement, and the controls required to use AI productively and responsibly at scale.

Module 8

AI-Powered Sales Transformation and Capstone

8.1 Future of AI-Powered Sales

Understand how AI-powered sales is evolving toward AI-augmented teams, intelligent sales organizations, AI agents, AI-supported customer experiences, and deeper human-AI collaboration. Learners will explore emerging technologies and the continuing importance of human strengths such as relationship building, negotiation, strategic judgment, empathy, creativity, and accountability.

8.2 Sales Workflow Automation

Explore how sales organizations can map current processes, identify repetitive activities, distinguish AI-suitable tasks from rule-based automation, and retain human decision points. Learners will examine Copilot-powered workflows, Power Automate, Copilot Studio, AI agents, permissions, approvals, error handling, auditability, security, and measurement of workflow improvements.

8.3 AI-Powered Sales Strategy

Learn how AI can support account strategy, customer segmentation, market analysis, competitive intelligence, opportunity identification, and revenue growth planning. Learners will explore how internal and external information, patterns, scenarios, and customer signals can inform strategy while human leaders validate evidence, interpret uncertainty, and connect growth opportunities to customer value.

8.4 Measuring Copilot Business Impact

Understand how to evaluate Copilot through productivity, time savings, lead and opportunity conversion, sales-cycle performance, revenue, customer engagement, adoption, and return on investment. Learners will explore baselines, before-and-after comparisons, comparison groups, attribution challenges, and a measurement hierarchy that connects usage with productivity, sales effectiveness, business outcomes, and financial value.

8.5 Capstone Project: AI-Powered Sales Solution

Develop an end-to-end AI-powered sales solution that applies concepts from across the course to a realistic sales organization. Learners will define a measurable sales problem, develop an Ideal Customer Profile, research accounts, qualify leads, create outreach, prepare meetings and proposals, analyze sales data, forecast results, identify risks and next actions, design follow-up automation, apply governance, plan adoption, and estimate business impact.

8.6 Capstone Presentation and Evaluation

Present the capstone as a professional business and technology solution that connects the sales problem, proposed AI workflow, prompt design, analytics, security, Responsible AI, human validation, and expected business value. Learners will demonstrate an integrated sales scenario, explain assumptions and safeguards, and communicate how the proposed solution should be evaluated against business, technical, governance, adoption, and impact criteria.