



AI+ Microsoft 365 Copilot Sales Specialty™

Certification



Copilot

Your AI Assistant for Sales



Research accounts
in seconds



Prepare for meetings
with key insights



Draft emails, proposals
& presentations



Analyze data and
identify opportunities



Summarize calls and
plan next steps

Pipeline Overview



\$8.42M
Total Pipeline
▲ 15%
vs last month

Sales Forecast



\$2.91M
Forecast
▲ 18%
vs last quarter



Copilot Insight

Top opportunity is at risk due to budget delay. Recommend early stakeholder alignment.

Executive Summary

The AI+ Microsoft 365 Copilot Sales Specialty™ certification equips sales professionals, account managers, sales operations teams, and sales leaders 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, customer engagement, prospecting, lead and opportunity management, sales analytics, forecasting, responsible AI, security, governance, workflow automation, AI agents, and sales transformation.

Learners develop practical understanding of how AI and Copilot support account research, customer communication, meeting preparation, proposals and presentations, sales-data analysis, forecasting, pipeline management, follow-up, and decision support. The certification emphasizes practical application, evidence-based sales work, human validation, responsible AI, secure use of organizational information, and measurable business impact.



Prerequisites

- **AI Fundamentals:** Understand basic AI concepts, machine learning, generative AI, large language models, AI agents, and common AI applications.
- **Sales Fundamentals:** Understand prospecting, lead qualification, customer engagement, opportunity management, account management, pipeline management, and forecasting.
- **Microsoft 365 Literacy:** Understand common use of Word, Excel, PowerPoint, Outlook, Teams, and organizational productivity workflows.
- **Data and Digital Literacy:** Understand CRM information, spreadsheets, sales data, KPIs, dashboards, and basic analytical concepts.
- **Responsible AI and Security Awareness:** Understand privacy, confidentiality, access permissions, human validation, governance, and safe use of AI-generated content.

Exam Blueprint

Number
of Questions

50

Passing
Score

35/50 or 70%

Duration

90 Minutes

Format

**Online via AI
Proctoring platform**

Question Type

**Multiple Choice/Multiple
Response**

Exam Overview

Module	Weight
AI Fundamentals for Modern Sales	7%
Microsoft 365 Copilot Fundamentals for Sales	15%
Prompt Engineering for Sales with Microsoft Copilot	15%
Copilot for Sales Productivity and Customer Engagement	15%
Copilot for Prospecting, Lead Generation and Opportunity Management	12%
Copilot for Sales Analytics, Forecasting and Decision Intelligence	12%
Responsible AI, Security, Governance and Copilot Adoption	12%
AI-Powered Sales Transformation and Capstone	12%
	100%

The logo for AI CERTs, featuring a stylized 'AI' in orange and 'CERTs' in black with a registered trademark symbol.

AI CERTs®

AI⁺

Microsoft 365 Copilot
Sales Specialty™

Certification Modules

Module 1

AI Fundamentals for Modern Sales

1.1 Introduction to Artificial Intelligence

1.2 Generative AI in Sales

1.3 AI-Powered Sales Lifecycle

1.4 AI Sales Use Cases

1.5 AI Limitations and Challenges

1.6 Case Studies

Module 2

Microsoft 365 Copilot Fundamentals for Sales

2.1 Introduction to Microsoft 365 Copilot

2.2 Microsoft 365 Copilot Ecosystem

2.3 Copilot for Sales Professionals

2.4 Working with Organizational Information

2.5 Copilot and Microsoft Sales Ecosystem

2.6 Case Studies

Module 3

Prompt Engineering for Sales with Microsoft Copilot

3.1 Fundamentals of Sales Prompt Engineering

3.2 Basic Prompting Techniques

3.3 Advanced Prompting Techniques

3.4 Sales-Specific Prompt Patterns

3.5 Prompt Evaluation and Optimization

3.6 Sales Prompt Library

3.7 Case Studies

Module 4

Copilot for Sales Productivity and Customer Engagement

4.1 Copilot for Outlook

4.2 Copilot for Microsoft Teams

4.3 Copilot for Microsoft Word

4.4 Copilot for Microsoft PowerPoint

4.5 Copilot for Microsoft Excel

4.6 Integrated Customer Engagement Workflow

4.7 Case Studies

Module 5

Copilot for Prospecting, Lead Generation and Opportunity Management

5.1 AI-Powered Prospecting

5.2 Lead Generation and Qualification

5.3 Personalized Sales Engagement

5.4 Opportunity Management

5.5 Account Management

5.6 Sales Pipeline Management

5.7 Case Studies

Module 6

Copilot for Sales Analytics, Forecasting and Decision Intelligence

6.1 Sales Data and Key Performance Indicators

6.2 Copilot for Excel Sales Analysis

6.3 AI-Assisted Sales Forecasting

6.4 Power BI for Sales Intelligence

6.5 Sales Decision Intelligence

6.6 Executive Sales Reporting

6.7 Case Studies

Module 7

Responsible AI, Security, Governance and Copilot Adoption

7.1 Responsible AI for Sales

7.2 AI Risks in Sales

7.3 Data Privacy and Security

7.4 Microsoft 365 Copilot Governance

7.5 Ethical AI-Powered Sales

7.6 Copilot Adoption in Sales Organizations

7.7 Case Studies

Module 8

AI-Powered Sales Transformation and Capstone

8.1 Future of AI-Powered Sales

8.2 Sales Workflow Automation

8.3 AI-Powered Sales Strategy

8.4 Measuring Copilot Business Impact

8.5 Capstone Project: AI-Powered Sales Solutio

8.6 Capstone Presentation and Evaluation

Certification Outcome

Upon completing the AI+ Microsoft 365 Copilot Sales Specialty™ course, learners will be able to apply AI and Microsoft 365 Copilot across the sales lifecycle, design effective sales prompts, prepare customer communications and meetings, support prospecting and opportunity management, analyze sales data, develop forecasts, automate suitable workflows, and apply responsible AI and governance practices in sales environments.

Participants will understand how AI and Copilot improve customer research, sales productivity, personalization, proposals, presentations, pipeline visibility, forecasting, account management, and decision support while recognizing challenges related to hallucinations, bias, data quality, privacy, security, prompt injection, excessive reliance on AI, and human accountability.



Market Insight

AI-powered sales is evolving from isolated productivity assistance toward integrated support for research, customer engagement, opportunity management, analytics, forecasting, automation, and customer relationship management. Sales organizations increasingly need professionals who can combine Microsoft 365 Copilot capabilities, sales expertise, data-driven decision-making, workflow automation, and responsible AI practices.



Value Proposition

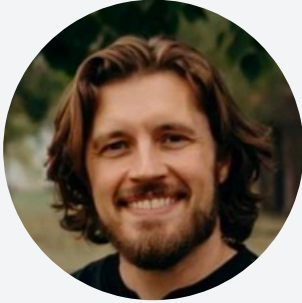
The certification provides an applied framework for using AI and Microsoft 365 Copilot in professional sales. Learners gain knowledge of Copilot-enabled productivity, sales prompt engineering, customer engagement, prospecting, lead and opportunity management, analytics and forecasting, decision intelligence, AI governance, workflow automation, AI agents, and sales transformation.



Additional Features

The course includes sales case studies, reusable prompt patterns, customer-engagement workflows, lead and opportunity scenarios, Excel and Power BI analysis activities, forecasting exercises, governance and security frameworks, workflow-automation and agent concepts, and a capstone project that integrates AI-powered sales strategy, execution, responsible AI, adoption, and business-impact measurement.

AI Experts



Jason Kellington

AI Expert

As a consultant, trainer, and technical writer with more than 25 years of experience in IT, I specialize in the development and delivery of solutions focused on effective and efficient enterprise IT.



Justin Frébault

AI Expert

I'm a boutique data consultant specializing in data mesh and lakehouse solutions. I've dedicated my career to helping organizations transform their approach to data, moving beyond mere knowledge.



J Tom Kinser

AI Expert

I have over forty years of experience in software development, data engineering, management, and technical training. I am a Microsoft Certified Trainer and a software developer, holding multiple certifications.



Terumi Laskowsky

AI Expert

Country Manager for Global Consulting Services in Japan, Specialties: Information Security (Compliance, Policy, Application, Host, Network)



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