KOENIG SOLUTIONS · COURSE OUTLINE

AI+ Microsoft 365 Copilot Sales Specialty™

1 Day	8	53	AP-0940
DURATION	MODULES	TOPICS	COURSE CODE

COURSE OVERVIEW

Turn Sales Insights into Action with Microsoft 365 Copilot for Personalized Engagement, Informed Decisions, and Responsible Growth. 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.

WHO THIS COURSE IS FOR

- Sales Professionals: Sales representatives, account executives, and sales managers seeking to improve prospecting, customer communication, opportunity management, and productivity with AI.
- Sales Operations and CRM Professionals: Those managing sales processes, CRM information, pipelines, and reporting who want to apply AI-assisted analysis and automation.
- Business Development and Customer Engagement Teams: Professionals seeking to strengthen account research, lead qualification, personalized outreach, and customer relationship management.
- Sales Leaders and Business Managers: Decision-makers looking to use Copilot for forecasting, performance analysis, sales planning, and team adoption.

TOOLS AND REQUIREMENTS

- 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.

- Technology and Digital Transformation Professionals: Those supporting Microsoft 365, CRM platforms, and business applications who want to evaluate and support responsible AI-powered sales workflows.

LEARNING OBJECTIVES

What You Will Learn

- Sales Prompt Engineering
- Copilot-Assisted Productivity
- Prospecting and Lead Qualification
- Personalized Customer Engagement
- Opportunity and Account Management
- Sales Analytics and Forecasting
- Responsible AI and Data Protection
- Workflow Automation and Business-Impact Measurement

COURSE SYLLABUS

8 Modules, 53 Topics

MODULE 1

01

AI Fundamentals for Modern Sales

TOPICS

- 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

02

Microsoft 365 Copilot Fundamentals for Sales

TOPICS

- 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

03

Prompt Engineering for Sales with Microsoft Copilot

TOPICS

- 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

04

Copilot for Sales Productivity and Customer Engagement

TOPICS

- 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

05

Copilot for Prospecting, Lead Generation and Opportunity Management

TOPICS

- 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

06

Copilot for Sales Analytics, Forecasting and Decision Intelligence

TOPICS

- 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

07

Responsible AI, Security, Governance and Copilot Adoption

TOPICS

- 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

08

AI-Powered Sales Transformation and Capstone

TOPICS

- 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 Solution
- 8.6 Capstone Presentation and Evaluation

WHAT IS INCLUDED

Everything You Need to Succeed

- Koenig course material for every module
- Delivery by certified instructors and subject matter experts
- Hands-on exercises throughout the course
- Course completion certificate from Koenig

ABOUT KOENIG

Who We Are

Established in 1993, Koenig Solutions is a globally recognised training provider with 35+ technology partnerships, 5,000+ training programmes and a network of certified instructors and subject matter experts, supporting individuals and enterprise teams worldwide.

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