Microsoft 365 Copilot for Sales and Marketing Training

Duration: **1 Day**

BILGINC IT Academy
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Microsoft 365 Copilot for Sales and Marketing is a hands-on, practical course designed to help sales and marketing professionals unlock the full potential of **Microsoft 365 Copilot**.
Through real-world exercises—including **consumer segmentation, campaign planning, image creation, and activity optimisation**—participants learn how to embed Copilot into their workflows to drive innovation, speed up insights, and enhance performance.

The session also focuses on **human-first adoption**, **AI ethics**, and **future readiness**, preparing learners to lead AI-driven transformation in marketing and sales.

Prerequisites

Participants should have:

- Basic familiarity with Copilot and prompt writing,
- Foundational knowledge of Microsoft 365 (Word, Excel, PowerPoint),
- No prior AI or coding experience required.

Who Should Attend

This course is designed for:

- Marketing and sales professionals at all levels,
- Business development and account managers,
- Digital marketing specialists exploring AI tools,
- Professionals aiming to integrate Copilot into daily workflows.

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What You Will Learn

By the end of this course, learners will be able to:

- Evaluate the **transformative potential of Microsoft 365 Copilot** in marketing,
- Integrate Copilot into **Microsoft Office tools** to enhance productivity,
- Benchmark Copilot against **traditional marketing tools and AI platforms**,
- Design real-world Copilot-driven marketing workflows,
- Automate processes and generate **AI-enhanced content**,
- Apply Copilot to solve marketing challenges (segmentation, ROI, creative design),
- Lead **ethical and responsible AI adoption** within their teams,
- Prepare for **emerging trends** like Copilot agents and hyper-personalisation.

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Training Outline

Welcome & Objectives
Course flow, introductions, and learning outcomes.

Human-First Approach
Principles of ethical AI and responsible adoption.

Use Case 1: Consumer Segmentation (Excel)
Hands-on simulation using Copilot in Excel for customer segmentation.

Use Case 2: Campaign Planning (Word, PPT, Excel)
Developing campaign ideas in Word, building presentations in PowerPoint, and creating forecasts in Excel.

Use Case 3: Image Creation (Copilot Chat)
Hands-on image generation with AI, followed by ethical discussion on copyright.

Use Case 4: Activity Optimisation (Excel & PPT)
Optimising campaign performance in real-time and generating executive summaries.

Gen AI Future Readiness
Exploring AI adoption phases and mapping personal readiness.

Copilot for My Role
Participants use Copilot to plan post-training actions.

Hands-On Learning

Includes:

- Live demonstrations across Word, Excel, PowerPoint, and Copilot Chat
- Scenario-based marketing simulations
- Peer review of Copilot-created campaigns
- Ethical reflection and group exercises