

AI+ Microsoft 365 Copilot Marketing Specialty (1 Day)

Program Detailed Curriculum

AI+

Microsoft 365 Copilot
Marketing Specialty™

Executive Summary

The AI+ Microsoft 365 Copilot Marketing Specialty certification equips professionals with the skills to leverage Microsoft 365 Copilot in enhancing marketing strategies. This certification focuses on integrating AI tools within marketing workflows to streamline processes, optimize customer interactions, and drive measurable results. It covers the key features of Microsoft 365 Copilot, including data-driven insights, content generation, and workflow automation. Professionals will gain expertise in using AI to elevate marketing campaigns, improve productivity, and ensure effective decision-making. This certification demonstrates proficiency in harnessing the power of AI for innovative and efficient marketing solutions.

Prerequisites :

- **Basic Understanding of AI Tools:** Familiarity with AI concepts and applications.
- **Proficiency in Microsoft 365:** Knowledge of core Microsoft 365 tools and functionalities.
- **Marketing Fundamentals:** Understanding of core marketing principles and strategies.
- **Data Analysis Skills:** Ability to interpret and analyze marketing data.
- **Content Creation Experience:** Familiarity with creating digital content for marketing.

Module 1

Introduction to Microsoft 365 Copilot & AI in Marketing

1.1 The Rise of AI in Marketing

- Understand the evolution of marketing from manual, time-intensive processes to AI-augmented workflows. Learn how AI tools streamline campaign planning, content creation, analytics, and personalization, enabling faster execution, improved efficiency, and more data-driven decision-making in modern marketing environments.

1.2 Meet Microsoft 365 Copilot for Marketing:

- Understand how Microsoft 365 Copilot enhances marketing workflows across ideation, execution, and analysis. Learn to use Copilot within Word, Excel, PowerPoint, Outlook, and Teams to create campaign assets, generate insights, improve collaboration, and deliver faster, data-driven marketing outcomes.

1.3 Copilot & Microsoft Graph: Secure Brand and Data Integration

- Understand how Microsoft Graph connects Copilot with organizational data, brand assets, and analytics. Learn to maintain brand consistency, apply role-based access controls, and ensure privacy compliance while leveraging secure, data-driven insights for responsible and effective marketing execution.

1.4 Intro to Responsible AI in Marketing:

- Understand the importance of responsible AI in marketing by addressing bias, ensuring transparency, and protecting consumer data. Learn Microsoft's Responsible AI principles, apply ethical practices in targeting and messaging, and explore how to create trustworthy, inclusive, and compliant AI-driven campaigns.

1.5 Case Study: Pulse Creative Agency

- Explore how Pulse Creative Agency leveraged Microsoft 365 Copilot to overcome workflow inefficiencies and content inconsistencies. Understand implementation strategies, analyze improvements in campaign delivery speed and quality, and learn how AI-driven tools enhance productivity, collaboration, and data-driven marketing outcomes.

Module 2

Core Copilot Skills for Marketing

2.1 Introduction to Microsoft 365 Copilot

- Understand how Microsoft 365 Copilot functions as an AI-powered assistant by integrating large language models, Microsoft Graph, and productivity apps. Learn to streamline marketing workflows, generate content, analyze data, and explore how Copilot enhances speed, creativity, and consistency across campaigns.

2.2 Creating Ad Copy and Campaign Messages

- Understand how to create platform-specific ad copy using Microsoft 365 Copilot. Learn to structure effective prompts, generate creative variations, and refine messaging through testing. Explore techniques to optimize tone, CTAs, and performance for high-impact, data-driven marketing campaigns.

2.3 Campaign Presentation Design

- Understand how to design compelling marketing presentations using Microsoft 365 Copilot in PowerPoint. Learn to transform strategy documents into structured decks, build persuasive narratives, embed data insights, and refine visuals through effective prompting for impactful stakeholder communication.

2.4 Blog & Social Media Content Creation

- Understand how to generate SEO-aligned blogs and engaging social media content using Microsoft 365 Copilot. Learn to create content calendars, repurpose assets across formats, and maintain consistent brand tone while scaling high-quality, multi-channel content production efficiently.

2.5 Case Study: BrandHive

- Explore how BrandHive leveraged Microsoft 365 Copilot to streamline multi-channel content creation and eliminate brand inconsistencies. Understand implementation strategies, evaluate improvements in campaign speed and scalability, and learn how AI enhances efficiency, collaboration, and strategic marketing execution.

Advanced Copilot Applications in Marketing

3.1 Generating A/B Testing Variations

- Understand how to use Microsoft 365 Copilot to generate multiple content variations for A/B and multivariate testing. Learn to apply psychological triggers, analyze performance differences, and refine messaging through iterative optimization to improve campaign effectiveness and conversion rates.

3.2 Personalized Email Campaigns

- Understand how to create personalized email campaigns using Microsoft 365 Copilot. Learn to generate persona-based email series, leverage CRM and engagement data for customization, and explore advanced segmentation techniques to deliver targeted, data-driven communication that improves engagement and conversion rates.

3.3 Using Copilot for Market Trend Analysis:

- Understand how to leverage Microsoft 365 Copilot to analyze market trends and competitor insights. Learn to extract actionable intelligence from reports, synthesize consumer behavior patterns, and structure data for visualization, enabling faster, data-driven strategic marketing decisions.

3.4 Case Study: FreshWave Foods:

- Explore how FreshWave Foods used Microsoft 365 Copilot to achieve scalable personalization and improve campaign performance. Understand the comparison between AI-augmented and manual workflows, analyze performance gains, and learn the importance of human validation in responsible, data-driven marketing.

Copilot Studio Agent for Marketing

4.1 Introduction to Copilot Studio

- Understand how Microsoft Copilot Studio enables marketers to build low-code, AI-powered copilots for automating workflows, accessing knowledge, supporting creative tasks, and ensuring compliance, helping teams streamline operations, enhance productivity, and deliver consistent, data-driven marketing outcomes.

4.2 Designing a Content Request Agent

- Understand how to design a Copilot Studio content request agent that automates creative briefs, gathers requirements through conversational flows, enables intelligent routing, integrates approval workflows, ensures compliance checks, and improves efficiency, transparency, and collaboration across marketing content operations.

4.3 Building a Brand Guidelines Q&A Agent

- Understand how to design a Copilot Studio agent that centralizes brand knowledge, answers queries conversationally, integrates diverse knowledge sources, enforces compliance, supports tone and asset guidance, and improves continuously through monitoring, feedback loops, and bias-aware optimization practices.

4.4 Case Study

- Understand how organizations apply Copilot Studio to automate marketing workflows, streamline content requests, enhance brand consistency, integrate knowledge sources, enable intelligent approvals, and drive measurable efficiency, scalability, and compliance through real-world AI-powered marketing operations and continuous improvement practices.

Module 5

Optimizing Copilot in Marketing

5.1 Prompt Refinement for Tone and Messaging:

- Understand how to refine prompts for clarity, tone, and compliance in Copilot Studio, learn structured prompt frameworks, explore tone calibration and evaluation techniques, and develop skills to optimize outputs, troubleshoot issues, and ensure consistent, high-quality marketing content generation.

5.2 Integrating Copilot with Analytics Dashboards

- Understand how to integrate Copilot with analytics tools like Power BI and Excel, learn to analyze marketing performance through natural language queries, explore feedback loops for prompt optimization, and develop skills to troubleshoot integration challenges for data-driven decision-making.

5.3 Case Study: AdSphere

- Understand how a B2B marketing agency leveraged Copilot to transform paid advertising workflows. Learn data-driven prompt optimization, explore performance analytics integration, and analyze measurable improvements in CTR, efficiency, and campaign scalability through structured, real-world implementation strategies.

Module 6

Responsible AI with Copilot — Policy, Safety & Trust

6.1 Principles in Practice

- Understand Microsoft's Responsible AI principles and learn how to apply fairness, reliability, privacy, inclusiveness, transparency, and accountability in marketing workflows. Explore governance strategies, risk mitigation techniques, and practical implementations to ensure ethical, compliant, and effective Copilot-driven marketing operations.

6.2 Data Protection & Compliance

- Understand how to safeguard sensitive marketing data in Copilot workflows, learn data classification, DLP policies, and secure prompt practices, explore Purview and Entra ID controls, and apply compliance strategies to prevent data exposure while enabling safe, efficient AI-driven marketing operations.

6.3 Bias, Hallucination & Human Oversight

- Understand AI bias and hallucination risks in marketing, learn to detect inaccuracies and discriminatory patterns, explore validation frameworks and human-in-the-loop workflows, and apply quality control practices to ensure accurate, inclusive, and trustworthy Copilot-generated content at scale.

6.4 Operationalizing Responsible AI

- Understand how to operationalize Responsible AI by developing Acceptable Use Policies, implementing prompt review checklists, and applying escalation matrices. Learn to integrate governance using Microsoft tools, ensure compliance, and establish continuous monitoring frameworks that balance innovation with risk management in marketing workflows.

Module 7

Capstone Project — End-to-End Marketing with Copilot

7.1 Introduction and Aim of the Capstone

- Understand the purpose and scope of the capstone, learn how AI-powered tools enhance marketing analytics workflows, explore campaign data analysis and reporting, and gain practical insights into automating performance evaluation and strategic decision-making using Microsoft 365 Copilot.

7.2 Project Overview and Learning Objectives

- Understand how to analyze marketing campaigns, learn to generate insights with AI tools, explore automated reporting and executive presentations, and gain hands-on experience integrating Microsoft 365 Copilot to strengthen strategic decision-making and professional communication in modern marketing workflows.

7.3 Tools Used

- Understand how Excel Copilot simplifies data analysis, learn to generate structured reports with Word, explore creating executive dashboards in PowerPoint, and gain skills in drafting professional communications using Outlook to enhance marketing efficiency and strategic decision-making.

7.4 Detailed Step-by-Step Hands-On Guide

- Understand the end-to-end workflow of AI-powered marketing analysis, learn to prepare datasets, explore data analysis, reporting, presentation, and communication steps, and gain hands-on experience using Microsoft 365 Copilot to generate insights, automate tasks, and deliver strategic marketing outcomes.