

Executive Summary

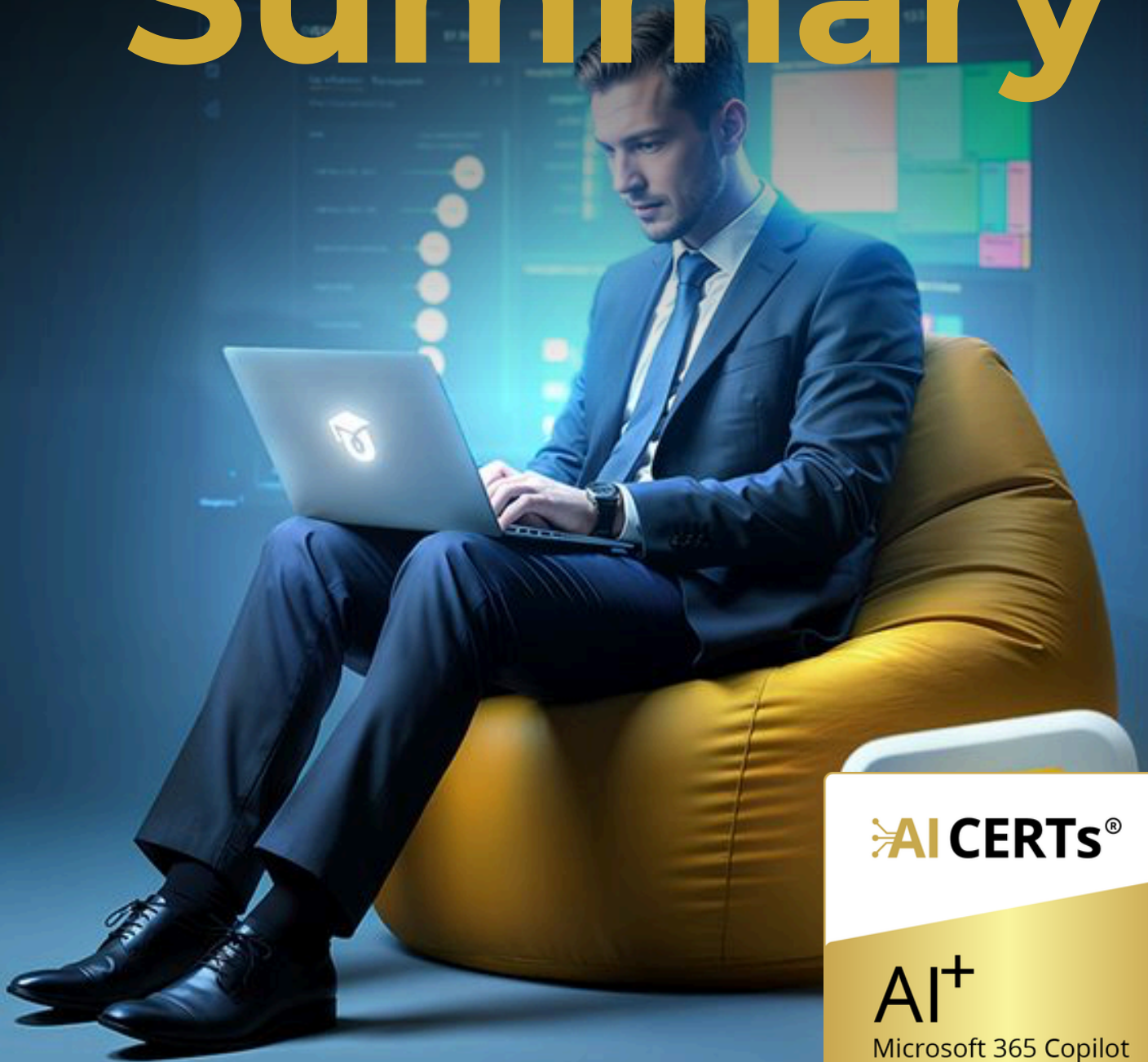


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Introduction

The AI+ Microsoft 365 Copilot Marketing Specialty certification equips you with the skills to use Microsoft 365 Copilot to strengthen marketing strategies and improve everyday workflows. You will learn how to integrate AI tools into marketing activities to streamline processes, enhance customer interactions, and support more effective campaign planning.

Through this certification, you will explore key Microsoft 365 Copilot capabilities, including data-driven insights, content generation, and workflow automation. You will gain practical expertise in using AI to improve productivity, make informed decisions, and create innovative marketing solutions that deliver measurable results. This certification thoroughly covers topics such as:

- Introduction to Microsoft 365 Copilot & AI in Marketing
- Core Copilot Skills for Marketing
- Advanced Copilot Applications in Marketing
- Copilot Studio Agent for Marketing
- Optimizing Copilot in Marketing
- Responsible AI with Copilot — Policy, Safety & Trust
- Capstone Project — End-to-End Marketing with Copilot

Certification Prerequisites

- **Basic understanding of AI concepts, Microsoft 365 tools:** Familiarity with marketing workflows, content creation functions and customer engagement.
- **Familiarity with core marketing content formats:** Comfortable using different formats, including ad copy, campaign messages, presentations, blogs, and social media content.
- **Understanding marketing personalization:** Basic understanding of A/B testing, email campaigns, segmentation, and basic market trend analysis.
- **Basic understanding of workflow automation:** Awareness about brand guidelines, content request processes, and how low-code tools can support marketing operations.
- **Familiarity with prompt writing:** Knowledge on tone refinement, campaign analytics, and basic dashboard tools such as Excel or Power BI.
- **Understanding responsible AI basics, data protection:** Basic knowledge of compliance, bias, hallucination risks, and the importance of human review in AI-generated marketing content.
- **Comfortable using Microsoft 365 Copilot:** Basic Understanding of Excel, Word, PowerPoint, and Outlook to analyze data.

Who Should Enroll?

- **Marketing Professionals:** Those who want to use Microsoft 365 Copilot to improve campaign planning, content creation, and performance analysis.
- **Digital Marketers:** Those who create ads, blogs, social media posts, email campaigns, and presentations across multiple channels.
- **Content Creators and Copywriters:** Those who want to generate, refine, and scale marketing content while maintaining brand tone and consistency.
- **Campaign Managers:** Those who want to streamline workflows, create data-driven messages, and improve campaign execution speed.
- **Marketing Analysts:** Those who work with campaign data, customer insights, market trends, and reporting dashboards.
- **Brand and Communication Teams:** Those who need to maintain consistent messaging, brand guidelines, and compliant content across teams.
- **Marketing Operations Professionals:** Those who want to explore Copilot Studio for automating content requests, approvals, and brand-related queries.
- **Responsible AI and Compliance Professionals:** Those who want to apply safe, ethical, and compliant AI practices in marketing workflows.

Certification Goals and Learning Outcomes

- **Build a Strong Foundation in AI for Marketing:** Understand how AI and Microsoft 365 Copilot transform marketing workflows, campaign planning, content creation, analytics, and customer engagement.
- **Use Copilot for Core Marketing Tasks:** Apply Microsoft 365 Copilot to create ad copy, campaign messages, presentations, blogs, and social media content with improved speed and consistency.
- **Leverage AI for Advanced Campaign Optimization:** Use Copilot for A/B testing, personalized email campaigns, audience segmentation, market trend analysis, and data-driven performance improvement.
- **Design AI-Powered Marketing Agents:** Create Copilot Studio agents to support content requests, brand guideline queries, workflow automation, approvals, and marketing knowledge management.
- **Optimize Prompts and Connect Analytics Tools:** Refine prompts for tone, clarity, and messaging while integrating Copilot with tools like Excel and Power BI for campaign insights.
- **Apply Responsible AI in Marketing:** Use responsible AI principles to protect data, reduce bias and hallucination risks, support compliance, and maintain human oversight in AI-generated marketing content.

The Impact of AI on Modern Marketing with Microsoft 365 Copilot

AI is significantly transforming modern marketing practices with Microsoft 365 Copilot across the globe, reshaping how marketing strategies are planned, executed, personalized, and optimized. In North America, which commands 28.8% of the AI market, organizations are integrating AI and Copilot into marketing workflows to enhance campaign planning, content creation, customer engagement, analytics, and cross-team collaboration. This adoption helps marketers optimize resources, identify customer trends, improve decision-making, and execute campaigns with greater speed and efficiency.

In the Asia-Pacific region, holding 25% of the market, AI and Microsoft 365 Copilot are enabling more adaptive marketing processes, such as real-time campaign insights, personalized customer communication, streamlined content production, and faster market response. This allows marketing teams to create targeted campaigns, improve customer interactions, and align marketing efforts more effectively across channels and departments. Europe, with 24.3% of the AI market, places strong emphasis on the ethical use of AI in marketing, particularly with tools like Microsoft 365 Copilot. Organizations focus on compliance, data privacy, transparency, and responsible use of customer data while creating

AI-supported campaigns. This ensures that marketing decisions, audience targeting, content generation, and customer communication remain trustworthy, inclusive, and aligned with regulatory expectations.

Emerging markets in the Middle East, Africa, and Latin America are steadily adopting AI in marketing, with growth rates of 2.4% and 5.4%, respectively. This adoption is improving campaign coordination, strengthening digital outreach, supporting content scalability, and enabling better collaboration between marketing, sales, and customer-facing teams.

Australia, experiencing a growth rate of 14.1%, is increasingly leveraging AI and Microsoft 365 Copilot to streamline marketing workflows, enhance campaign execution, improve content quality, and support data-driven decision-making. This reflects the growing role of AI in helping marketing teams work faster, personalize communication, and deliver measurable results. This global shift highlights how AI, combined with Microsoft 365 Copilot, is strengthening modern marketing by improving creativity, personalization, collaboration, productivity, and campaign performance across organizations and regions.

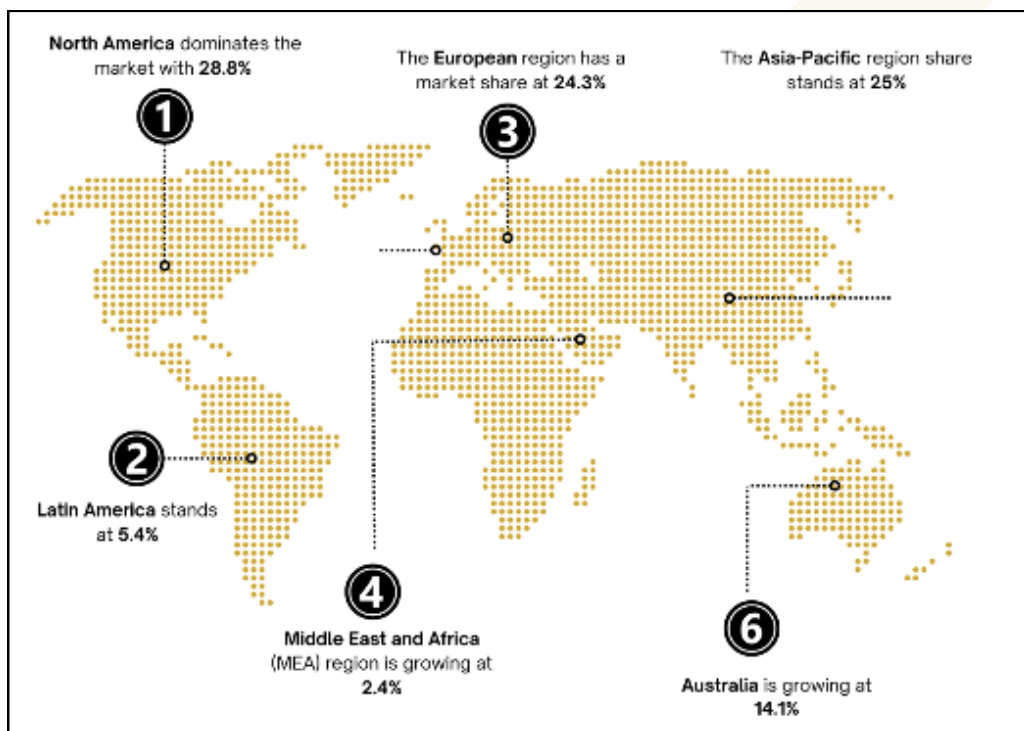


Figure 1: Market Share of AI from a Regional Perspective

What is Next for AI?

AI is moving toward more personalized, connected, and action-oriented support, especially in marketing. The next stage of AI will help marketers plan campaigns, analyze customer behavior, generate targeted content, create presentations, summarize insights, and improve decision-making within everyday tools like Word, Excel, PowerPoint, Outlook, Teams, and Copilot Studio. Microsoft already positions Copilot for marketing around content creation, campaign optimization, and customer insights, which aligns closely with the course focus. As marketing teams continue using AI, the focus will shift from “creating faster” to “creating smarter,” where Copilot helps teams maintain brand consistency, personalize communication, review performance, and make decisions based on real-time data.

The future of AI will also bring more intelligent marketing agents that can support workflows from start to finish. With Copilot Studio, professionals can build AI agents that answer questions, retrieve knowledge, automate tasks, and support business processes across Microsoft 365 environments. For this course, that future connects directly to skills such as designing content request agents, building brand guideline Q&A agents, refining prompts, integrating analytics dashboards, and applying responsible AI practices. Learners will need to balance automation with human oversight, especially when working with customer data, campaign messaging, bias, hallucinations, and compliance. The next phase of AI in marketing will belong to professionals who can combine creativity, data analysis, responsible decision-making, and hands-on Copilot skills to build faster, safer, and more effective marketing workflows.

How AI Can Transform Marketing Practices Using Microsoft 365 Copilot

AI can transform marketing practices by helping teams move from manual, time-consuming work to smarter, faster, and more connected workflows. With Microsoft 365 Copilot, marketers can create content, analyze campaign data, personalize communication, improve collaboration, and make informed decisions within the tools they already use every day.

Below are a few transformative ways:



Figure 2: How AI Can Transform Marketing Practices Using Microsoft 365 Copilot

With Microsoft 365 Copilot, marketing teams can work more efficiently, stay aligned, and create stronger campaigns backed by creativity, data, and responsible AI practices.

How AI Can Address the Current Marketing Challenges with Microsoft 365 Copilot

Modern marketing teams often manage tight timelines, multiple channels, large volumes of customer data, and the need for consistent messaging. Microsoft 365 Copilot helps address these challenges by bringing AI into everyday marketing workflows, enabling teams to create faster, analyze smarter, collaborate better, and maintain quality across campaigns.

Here’s an overview of common challenges and how AI offers practical solutions:

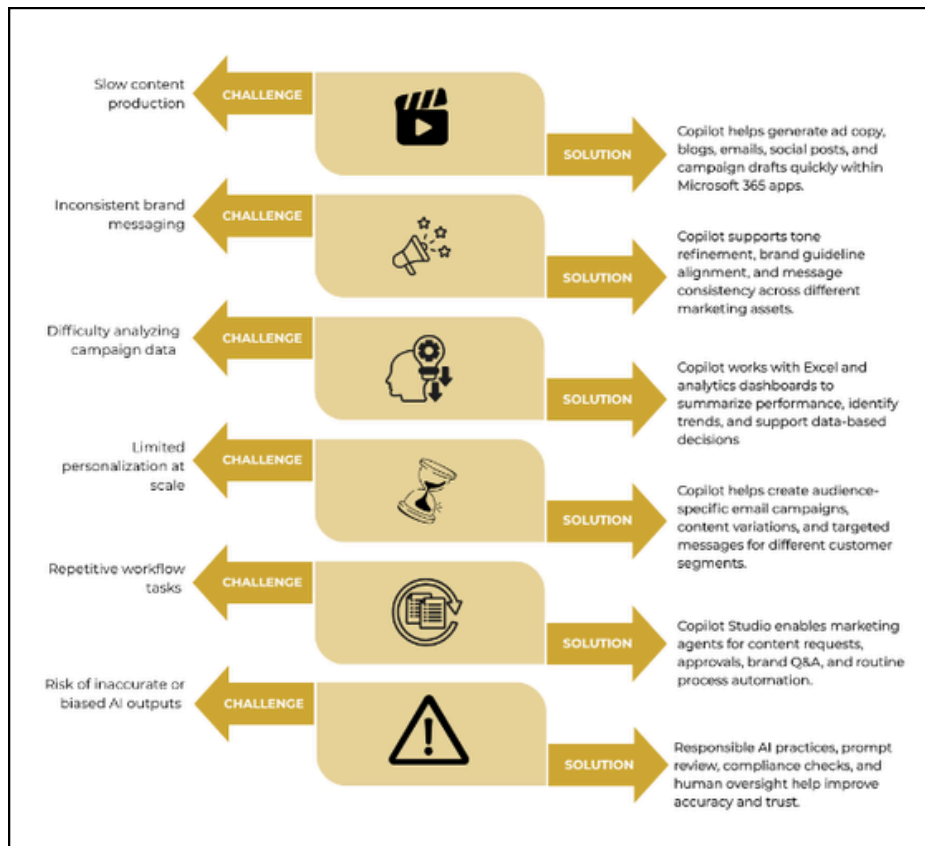


Figure 3: How AI Can Address the Current Marketing Challenges with Microsoft 365 Copilot

With Microsoft 365 Copilot, marketers can handle everyday challenges with more structure, speed, and confidence while keeping creativity and responsible for decision-making at the center.



How AI Adoption is Transforming Marketing Across Industries with Microsoft 365 Copilot

Marketing professionals are increasingly adopting AI to enhance their strategies and streamline workflows, transforming how campaigns are executed, analyzed, and optimized. AI tools, such as Microsoft 365 Copilot, are becoming integral to marketing teams across industries, allowing professionals to shift from manual, time-consuming tasks to more efficient, data-driven processes. One of the most significant ways AI is being embraced is content creation—marketers are using AI to generate ad copy, blogs, social media posts, and email campaigns, reducing the time spent on drafting and increasing consistency. AI-powered analytics also help professionals make more informed decisions by analyzing large sets of data to identify trends, measure performance, and predict customer behaviors. Additionally, AI is helping marketers personalize their communications at scale, creating more targeted and relevant content for different customer segments. With the integration of tools like Microsoft 365 Copilot, marketing professionals are not only automating repetitive tasks but also enhancing collaboration and decision-making. The ability to quickly adapt to new trends, personalize customer experiences, and optimize marketing efforts with AI tools is reshaping the marketing landscape, making it more agile and effective in an increasingly competitive environment.

How to Integrate AI into Marketing Workflows Using Microsoft 365 Copilot

Integrating AI into marketing workflows with Microsoft 365 Copilot can significantly boost efficiency, creativity, and data-driven decision-making. By leveraging AI tools within the Microsoft 365 suite, marketing teams can streamline content creation, enhance collaboration, personalize customer engagement, and optimize campaigns with real-time insights, all within the tools they use every day. Here's how to successfully integrate AI into marketing operations:

Key Steps:



Figure 4: Key Steps to Integrate AI into Marketing Workflows Using Microsoft 365 Copilot

Integrating Microsoft 365 Copilot into marketing workflows enables teams to enhance efficiency, creativity, and data-driven decision-making for smarter and more impactful campaigns.

Module 1: Introduction to Microsoft 365 Copilot & AI in Marketing

As marketing evolves, AI-driven tools like Microsoft 365 Copilot are transforming how teams approach campaign planning, content creation, and performance analysis. Understanding these changes is essential for staying competitive in the fast-paced marketing landscape, ensuring that teams can leverage AI to enhance efficiency, personalization, and data-driven decisions.

In this module, you will learn how AI is reshaping marketing workflows. You'll explore the key features of Microsoft 365 Copilot, including its role in campaign ideation, execution, and analysis. You will gain practical insights into how to use Copilot across tools like Word, Excel, PowerPoint, and Teams to streamline marketing processes and create data-driven outcomes.



Module 2: Core Copilot Skills for Marketing

Mastering the core skills of Microsoft 365 Copilot is crucial for marketers to unlock the full potential of AI in their workflows. By understanding these tools, you can streamline repetitive tasks, enhance creativity, and optimize the efficiency of your marketing team, ultimately achieving more impactful campaigns with fewer resources.

This module will teach you how to use Microsoft 365 Copilot to create effective marketing content, such as ad copy, campaign messages, presentations, and blogs. You'll also learn how to leverage Copilot to refine content, maintain brand consistency, and optimize your messaging across multiple platforms.

Module 3: Advanced Copilot Applications in Marketing

As marketing strategies become more sophisticated, advanced AI applications can help you stay ahead of the competition. Understanding how to use Copilot for tasks like A/B testing, personalized campaigns, and market analysis will ensure that you can execute more targeted, high-performing strategies that deliver measurable results.

In this module, you'll dive into advanced features of Microsoft 365 Copilot, such as generating multiple variations for A/B testing, creating personalized email campaigns, and analyzing market trends. You'll also learn how to apply data-driven insights to improve marketing performance and campaign effectiveness.



Module 4: Copilot Studio Agent for Marketing

The ability to design AI-powered agents is a game-changer for marketing operations. By understanding how to build these agents, you can automate tasks, streamline workflows, and enhance collaboration across teams, leading to more efficient and scalable marketing operations.

This module will teach you how to use Copilot Studio to design intelligent agents for content requests, brand guidelines, and approval of workflows. You will also learn how to build agents that enhance collaboration, improve marketing knowledge management, and ensure compliance with organizational standards.

Module 5: Optimizing Copilot in Marketing

To maximize the impact of AI on marketing, it's crucial to refine how you interact with Copilot. Optimizing prompts and integrating Copilot with analytics tools allows you to generate better content and actionable insights, improving overall marketing decision-making and campaign effectiveness.

In this module, you will learn how to refine prompts for content creation, ensure consistent tone and messaging, and integrate Copilot with analytics tools like Power BI and Excel. You'll gain hands-on experience in optimizing Copilot's outputs and using data-driven insights for more strategic marketing decisions.



Module 6: Responsible AI with Copilot, Policy, Safety & Trust

As AI continues to play a central role in marketing, it's vital to ensure that it is used responsibly and ethically. Understanding the principles of responsible AI helps maintain trust, safeguard customer data, and prevent biases in marketing campaigns, ensuring long-term success and compliance.

In this module, you will learn about Microsoft's Responsible AI principles and how to apply them in marketing. You'll explore best practices for data privacy, ensuring fairness in AI-generated content, and implementing compliance checks. You will also learn to mitigate biases and hallucinations through human oversight and review processes.

Module 7: Capstone Project, End-to-End Marketing with Copilot

The capstone project brings together all the skills and tools you've learned throughout the course, allowing you to apply them in a real-world scenario. This practical experience is key to mastering Microsoft 365 Copilot and demonstrating your ability to drive marketing success through AI-driven solutions.

In this final module, you will gain hands-on experience by working through an end-to-end marketing workflow using Microsoft 365 Copilot. You'll analyze campaign data, create reports, generate presentations, and communicate insights all while applying the tools and techniques you've learned to deliver a comprehensive marketing strategy.

How Can AI CERTs Help Build an AI-Ready Culture?

While AI offers immense opportunities, businesses frequently encounter obstacles such as skill gaps, managing complex data, and integration challenges. At AI CERTs, we tackle these issues head-on with expertly crafted certifications, empowering organizations to build the expertise needed to overcome these barriers and unlock AI's full potential.

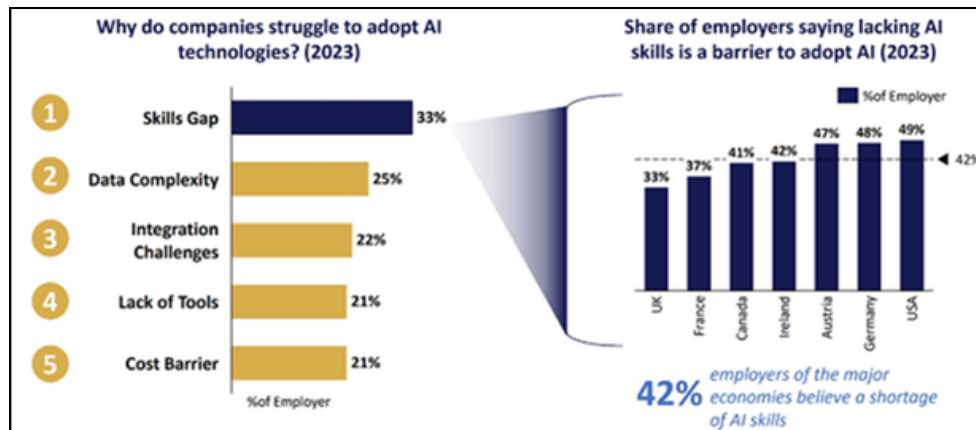


Figure 5: Factors determining the lack of adopting AI Technologies

Source: OCED and IBM

Bridging the AI Skill Gap

- Challenge:** Many marketing professionals struggle to integrate AI tools into their daily marketing workflows due to a lack of technical expertise in AI. This limits their ability to fully utilize AI's potential to optimize campaign planning, content creation, customer engagement, and performance analysis, resulting in inefficiencies and missed opportunities in marketing operations.
- Solution:** The AI+ Microsoft 365 Copilot Marketing Specialty course offers specialized training to bridge this gap. This certification equips marketing professionals with the practical knowledge needed to seamlessly integrate Microsoft 365 Copilot into their marketing processes. It helps them automate tasks, refine campaign strategies, improve data-driven decision-making, and create personalized marketing experiences.
- Benefit:** By completing this training, marketing professionals will gain the skills to effectively leverage AI tools in their daily tasks, improving efficiency and creativity in campaign execution. This leads to more accurate customer targeting, optimized content creation, and enhanced collaboration. Ultimately, organizations can achieve more effective marketing strategies, better customer engagement, and a higher return on investment from marketing efforts.



Empowering Professionals with AI Skills

- **Challenge:** Marketing professionals often face difficulties accessing and effectively utilizing advanced AI tools and platforms. This limits their ability to enhance marketing strategies, stay current with the latest technological advancements, and fully leverage AI's potential in areas like campaign planning, content creation, customer targeting, and performance analysis.
- **Solution:** The AI+ Microsoft 365 Copilot Marketing Specialty course provides comprehensive, up-to-date training on the latest AI tools and platforms, specifically tailored to the needs of marketing professionals. This course equips marketing teams with the knowledge to integrate Microsoft 365 Copilot seamlessly into their workflows, addressing the unique demands of modern marketing practices.
- **Benefit:** By gaining access to AI tools and specialized training, marketing professionals can incorporate AI into their daily tasks with ease, improving operational efficiency, enhancing creativity, and optimizing customer engagement strategies. This results in more effective campaigns, better decision-making, and a higher return on marketing investments, driving stronger overall business performance.

At AI CERTs, we provide a strategic approach to foster a culture of AI integration and innovation. Our AI certifications offer in-depth training and valuable recognition, empowering your employees to lead your organization into an AI-powered future.

AI CERTs Cultivate AI Culture in Several Ways:

1. Our certification provides a clear and comprehensive introduction to AI fundamentals and applications, designed to make the learning experience easy and accessible.
2. We ensure continuous learning opportunities to keep your team updated on emerging AI advancements, empowering your company to lead the industry.
3. AI CERTs promote teamwork and knowledge sharing, fostering the critical collaboration needed for seamless AI adoption.

AI CERTs: Your Pathway to Becoming AI-Ready

The future of business belongs to those who harness the power of AI.

Tailored for Success: Our certifications are crafted to address your team's unique requirements, offering specialized training to equip them with the vital skills needed for key AI roles.

Actionable Expertise: Through hands-on learning with real-world projects and case studies, we enable your team to gain practical expertise and implement AI effectively to foster innovation and progress.

Become an AI Leader: Empower your team with AI CERTs to build an AI-driven culture, unlock cutting-edge technology, and drive your organization's success.

The logo for AI CERTs features the word "AI" in a bold, yellow, sans-serif font. The letter "I" is stylized with three horizontal lines extending from its right side, resembling a circuit board or a neural network. To the right of "AI" is the word "CERTs" in a white, bold, sans-serif font. A registered trademark symbol (®) is positioned to the upper right of the "s".

AI CERTs[®]

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