KOENIG SOLUTIONS · COURSE OUTLINE

AI for Sales: Microsoft Copilot & Prompt Engineering

Learn to use Microsoft Copilot and prompt engineering to enhance customer interactions and sales workflows.

1 Day	6	25
8 HOURS A DAY	MODULES	TOPICS

COURSE OVERVIEW

This course introduces Microsoft Copilot and its features before examining how it supports sales professionals in personalising customer engagement and improving response times. It covers use cases such as lead generation, personalised sales pitches, customer support, sales forecasting, automating follow-ups and market research. It then addresses crafting effective prompts, roleplay-based training and responsible AI principles, followed by real-world case studies and future trends in generative AI for sales.

WHO THIS COURSE IS FOR

- **Sales Professionals**
- **Sales Managers**
- **Customer Support Representatives**
- **Business Development Executives**
- **Marketing Professionals**

LEARNING OBJECTIVES

- Describe Copilot and its user-friendly features
- Explain how Copilot personalises customer engagement
- Apply Copilot to lead generation and data visualisation
- Customise sales pitches and messages for prospects
- Analyse sales data to support forecasting and trends
- Craft effective prompts for use with Copilot
- Identify responsible AI design principles and compliances
- Assess real-world case studies of Copilot in sales

COURSE SYLLABUS

6 Modules, 25 Topics

01

Introduction to Copilot

WHAT IS COPILOT

Overview and Background · User-friendly Features

02

Copilot for Sales Professionals

ENHANCING CUSTOMER INTERACTIONS

Personalizing Customer Engagement · Improving Response Time

03

Use Cases of Copilot in Sales

LEAD GENERATION (DATA VISUALIZATION)

Identifying and Engaging Potential Leads

PERSONALIZED SALES PITCHES

Customizing Messages for Prospects

CUSTOMER SUPPORT (CUSTOMER DISCUSSIONS OR REVIEWS)

Providing Instant Support · Reducing Response Time

SALES FORECASTING (PREDICTIVE ANALYTICS)

Analyzing Sales Data · Predicting Trends

AUTOMATING FOLLOW-UPS (ONLY THEORY BECAUSE INTEGRATION OF GENAI TOOLS IS REQUIRED IN ORGANIZATION SYSTEM, NOT POSSIBLE)

Setting Up Automated Emails · Benefits of Automation

MARKET RESEARCH (CONNECTING TO ORGANIZATION DATA - RAG)

Gathering Market Insights · Analyzing Competitors · Improving Skills

04

Prompting for Using Copilot in Sales

CRAFTING EFFECTIVE PROMPTS

Writing Clear Prompts · Examples of Good Prompts

TRAINING AND ROLEPLAY (PROMPTING TECHNIQUES)

Simulating Client Interactions

RESPONSIBLE AI

Design Principles for Responsible AI · Government Compliances

05

Real-World Examples and Case Studies

SUCCESS STORIES

Detailed Case Studies · Impact on Sales Performance · Common Challenges and Solutions

06

Future Scope of Generative AI in Sales

FUTURE TRENDS IN AI AND SALES

Emerging Technologies · Predictions for the Future of Sales

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.

FLEXIBLE DELIVERY

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