

MB-7007: Deploy and configure Microsoft 365 Copilot for Sales Course

Course Duration: 8 Hours

Course code: MB-7007

1. Course Overview

The MB-7007: Deploy and Configure Microsoft 365 Copilot for Sales course equips learners with the knowledge and skills to set up, customize, and optimize Microsoft 365 Copilot for Sales. This hands-on training focuses on deployment strategies, integration with Microsoft 365 applications, configuration of sales workflows, and best practices to maximize productivity. Participants will learn how to align Copilot capabilities with organizational sales processes to drive better engagement, efficiency, and revenue outcomes.

2. What you'll learn?

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

- Understand the core capabilities and benefits of Microsoft 365 Copilot for Sales.
- Deploy Copilot in a sales environment and integrate it with Microsoft 365 services.
- Configure sales-specific features, including AI-powered suggestions and CRM connectivity.
- Customize prompts and workflows to support various sales scenarios.
- Implement security, compliance, and governance controls for Copilot usage.
- Troubleshoot common configuration and deployment issues.

3. Target Audience

This course is ideal for:

- Sales Operations Managers
- CRM Administrators
- IT Professionals managing Microsoft 365 environments
- Business Analysts focused on sales enablement
- Sales Managers and Team Leads implementing AI solutions in sales

4. Pre-Requisites

Learners should have:

- Basic understanding of Microsoft 365 services and applications.
- Familiarity with sales processes and CRM systems (such as Dynamics 365 Sales).
- Experience with Microsoft Teams, Outlook, and SharePoint is beneficial.

5. Course content

Module 1: Introduction to Microsoft 365 Copilot for Sales

- Overview of Copilot features and benefits for sales teams
- AI-driven productivity in the sales process
- Understanding licensing and requirements

Module 2: Preparing the Environment for Copilot Deployment

- Configuring Microsoft 365 tenant settings
- Licensing and user provisioning
- Security and compliance considerations

Module 3: Deploying Copilot for Sales

- Step-by-step deployment process
- Integration with Dynamics 365 Sales and other CRMs
- Activating Copilot features in Microsoft Teams, Outlook, and other apps

Module 4: Configuring Sales Workflows and Prompts

- Customizing Copilot prompts for sales activities
- Automating follow-ups and opportunity tracking
- Personalizing content generation for proposals and pitches

Module 5: Governance, Security, and Troubleshooting

- Data privacy and compliance management
- Role-based access and permissions
- Resolving common deployment and usage issues

Module 6: Best Practices and Adoption Strategies

- Driving user adoption and engagement
- Measuring ROI of Copilot in sales operations
- Continuous improvement and feature updates