

Executive Summary

 AI CERTs®
The logo is identical to the one in the top left corner.

AI⁺

Microsoft 365 Copilot
Retail Specialty™

TABLE OF CONTENTS

Introduction	1
Certification Prerequisites	1
Who Should Enroll?	2
Certification Goals and Learning Outcomes	2
The Impact of AI on Modern Retail Practices	3
What Is Next for AI in Retail?	4
How AI and Microsoft 365 Copilot Can Transform Retail Practices	5
How AI Can Address Current Retail Challenges	6
How AI Adoption Is Transforming Retail Operations and Customer Experiences	7
How to Integrate AI and Microsoft 365 Copilot into Retail Workflows	7
Module 1: Foundations of AI and Microsoft 365 Copilot in Retail	9
Module 2: Core Copilot Skills for Retail	9
Module 3: Advanced Copilot Applications in Retail	10
Module 4: Copilot Studio Agent for Retail	10
Module 5: Optimizing Copilot in Retail	11
Module 6: Responsible AI with Copilot: Policy, Safety, and Trust	11
Module 7: Capstone Project: End-to-End Retail with Copilot	12
How Can AI CERTs Help Build an AI-Ready Culture?	12

Introduction

The AI+ Microsoft 365 Copilot Retail Specialty certification equips you with the skills to apply artificial intelligence and Microsoft 365 Copilot capabilities to modern retail environments. You will learn how AI can enhance retail operations, improve decision-making, optimize customer experiences, and increase productivity across merchandising, marketing, sales, and store operations.

Through this certification, you will explore key AI and Copilot concepts, including retail data integration, intelligent workflows, prompt engineering, predictive insights, personalization strategies, and responsible AI practices. You will gain practical expertise in using Microsoft 365 Copilot across tools such as Word, Excel, PowerPoint, Teams, and Outlook to streamline retail processes, support data-driven decisions, and solve real-world business challenges.

This certification thoroughly covers topics such as:

- Foundations of AI and Microsoft 365 Copilot in Retail
- Core Copilot Skills for Retail
- Advanced Copilot Applications in Retail
- Copilot Studio Agent for Retail
- Optimizing Copilot in Retail
- Responsible AI with Copilot: Policy, Safety, and Trust
- Capstone Project: End-to-End Retail with Copilot

Certification Prerequisites

- **Basic understanding of AI and retail concepts:** Familiarity with fundamental AI principles, retail operations, customer experience concepts, and digital transformation practices.
- **Knowledge of Microsoft 365 and productivity tools:** Understanding of common Microsoft 365 applications such as Word, Excel, PowerPoint, Teams, and Outlook, along with their role in business workflows.
- **Familiarity with retail processes and operations:** Awareness of merchandising, sales, marketing, inventory management, customer engagement, and store operations.
- **Understanding of data and analytics concepts:** Basic knowledge of business data, reporting, data-driven decision-making, customer insights, and the importance of data quality in AI applications.
- **Basic understanding of AI-powered automation:** Familiarity with automation concepts, intelligent workflows, prompt-based interactions, and how AI can support retail productivity.
- **Understanding of responsible AI and data governance:** Awareness of AI ethics, privacy protection, compliance requirements, security controls, and the importance of human oversight when using AI.
- **Comfort with AI-powered retail tools:** Basic understanding of using AI technologies for customer personalization, operational insights, content creation, reporting, and retail decision support.



Who Should Enroll?

- **Retail Professionals:** Those who want to enhance their retail skills by applying AI and Microsoft 365 Copilot to improve customer experiences, operations, and decision-making.
- **Store Managers and Retail Leaders:** Those who want to use AI-powered insights to optimize store performance, improve communication, and make data-driven operational decisions.
- **Merchandising Professionals:** Those who want to apply AI techniques for product planning, inventory optimization, store layouts, and merchandising strategies.
- **Marketing and Sales Professionals:** Those who want to leverage Microsoft 365 Copilot for campaign creation, customer personalization, sales strategies, and promotional planning.
- **Retail Operations Teams:** Those who manage daily retail workflows and want to use AI tools to improve productivity, reporting, collaboration, and operational efficiency.
- **Business Analysts and Data Professionals:** Those who want to explore AI-driven analytics, retail insights, demand forecasting, and data-supported decision-making.
- **Microsoft 365 Users and Technology Professionals:** Those who want to understand how Microsoft 365 Copilot can transform retail workflows using applications such as Word, Excel, PowerPoint, Teams, and Outlook.
- **Retail Transformation and Innovation Leaders:** Those who want to implement AI strategies, improve organizational productivity, and drive digital transformation across retail environments.
- **Professionals Interested in AI-Powered Retail:** Those who want to build foundational expertise in combining artificial intelligence, Microsoft 365 Copilot, and modern retail practices.

Certification Goals and Learning Outcomes

- **Understand AI and Microsoft 365 Copilot Fundamentals:** Build a strong foundation in artificial intelligence concepts, Microsoft 365 Copilot capabilities, and the role of AI in transforming modern retail operations.
- **Apply Copilot for Retail Productivity and Collaboration:** Use Microsoft 365 Copilot across Word, Excel, PowerPoint, Teams, and Outlook to improve communication, reporting, documentation, and daily retail workflows.
- **Leverage AI for Retail Analytics and Decision-Making:** Apply AI-driven insights to analyse sales data, optimize inventory, understand customer behaviour, and support data-driven retail decisions.
- **Implement AI-Powered Retail Strategies:** Explore how Copilot can enhance merchandising, marketing campaigns, store operations, customer personalization, and sales performance.

- **Optimize Retail Workflows with Copilot and Data Integration:** Understand how Microsoft Graph and connected retail data sources enable intelligent workflows, predictive insights, and improved operational efficiency.
- **Apply Responsible AI and Retail Governance Practices:** Implement ethical AI practices, maintain data privacy, support compliance requirements, and ensure secure and responsible use of AI in retail environments.
- **Develop AI-Driven Retail Solutions:** Apply learned concepts through practical scenarios to design effective Microsoft 365 Copilot-based approaches for solving real-world retail challenges.

The Impact of AI on Modern Retail Practices

Over the past decade, AI has played a major role in transforming the retail industry by improving customer experiences, optimizing operations, and enabling data-driven decision-making. According to a recent MarketsandMarkets™ report, the global AI market was valued at \$150.2 billion in 2023 and is projected to grow at a compound annual growth rate (CAGR) of 36.8% from 2023 to 2030, with revenues expected to reach approximately \$1,345.2 billion by 2030.

AI has significant potential to reshape the future of retail by enabling intelligent automation, personalized customer engagement, predictive analytics, and smarter business strategies. North America leads with the largest market share at 28.8%, followed by the Asia-Pacific region at 25%. Europe holds 24.3% of the market, with the United Kingdom showing a growth rate of 14.1%. Meanwhile, Latin America and the Middle East and Africa (MEA) region each account for 5.4% of the market, highlighting the growing adoption of AI technologies across global retail ecosystems.

The integration of AI and Microsoft 365 Copilot into retail workflows is transforming how organizations manage merchandising, marketing, sales, customer engagement, and store operations. Traditionally, retail decisions relied heavily on manual reporting, historical trends, and employee experience. However, AI-powered solutions have introduced automation, real-time insights, predictive forecasting, and intelligent assistance through tools such as Microsoft 365 Copilot. Retail teams can now analyze customer behavior, optimize inventory, create personalized campaigns, and improve collaboration using AI-driven recommendations. This transformation enables retailers to build more adaptive, efficient, and customer-focused operations while making faster and more informed business decisions.

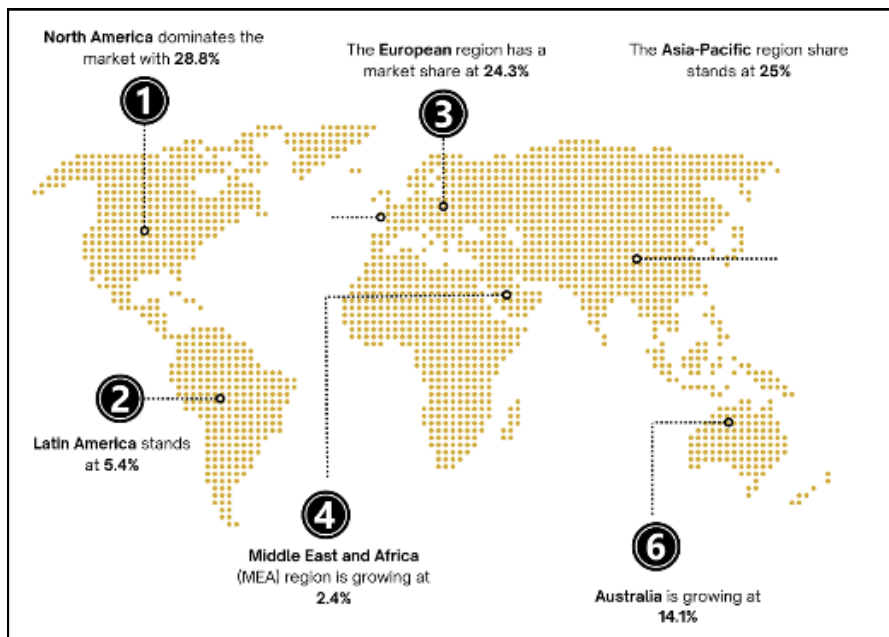


Figure 1: Market Share of AI from a Regional Perspective

What is Next for AI?

As AI continues to evolve, it presents exciting opportunities for retailers to enhance customer experiences, improve operational efficiency, and drive innovation across the industry. Advancements in AI, including machine learning, natural language processing, and intelligent automation, are enabling retailers to optimize inventory management, personalize customer interactions, streamline business processes, and improve decision-making. These developments offer retail organizations the ability to leverage AI and Microsoft 365 Copilot for smarter workflows, more efficient resource utilization, and improved business outcomes.

Looking ahead, AI and Microsoft 365 Copilot have the potential to transform the retail landscape by enabling more adaptive, data-driven, and customer-focused operations. By embracing AI-powered solutions, retailers can address complex challenges with predictive insights, automate routine tasks, enhance collaboration, and create personalized shopping experiences. The future of AI in retail provides organizations with the opportunity to build more efficient, innovative, and responsive environments where technology drives business growth, productivity, and improved customer satisfaction.

How AI Can Transform Retail Practices

AI can transform retail practices by enabling organizations to move from traditional, reactive approaches to intelligent, predictive, and automated retail strategies. With AI-powered retail capabilities, businesses can analyze large volumes of customer and operational data, understand buying patterns, optimize inventory, personalize customer experiences, automate repetitive tasks, and improve decision-making across retail functions.

Below are a few transformative ways:



Figure 2: How AI Can Transform Retail Practices

With AI+ Microsoft 365 Copilot Retail Specialty skills, retail professionals can combine artificial intelligence with Microsoft 365 Copilot capabilities to build smarter, faster, and more customer-focused retail operations. By leveraging AI-driven insights, automation, and collaboration tools, organizations can enhance productivity, optimize workflows, and create more personalized and efficient retail experiences.

How AI Can Address the Current Retail Challenges

Modern retail organizations face increasing challenges such as changing customer preferences, inventory complexity, large volumes of business data, operational inefficiencies, and the need for faster decision-making. AI helps address these challenges by improving customer insights, automating workflows, optimizing inventory, enhancing personalization, and enabling smarter retail strategies.

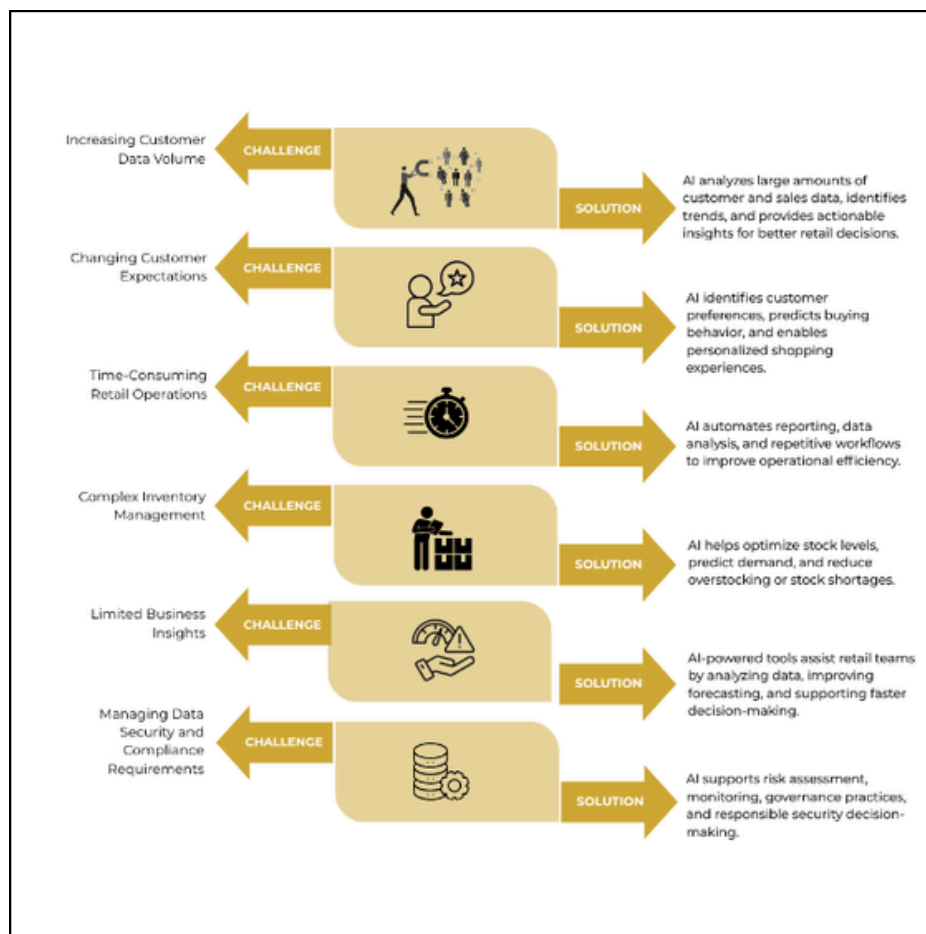


Figure 3: How AI Can Address the Current Retail Challenges

With AI+ Microsoft 365 Copilot Retail Specialty skills, retail professionals can overcome modern retail challenges by combining AI capabilities with Microsoft 365 Copilot expertise to create more intelligent, efficient, and customer-focused retail environments. By leveraging AI-driven insights, automation, and responsible AI practices, organizations can improve productivity, enhance decision-making, and deliver better retail experiences.

How AI Adoption is Transforming Retail Across Industries

Retail organizations are increasingly adopting AI and Microsoft 365 Copilot to enhance decision-making, improve customer experiences, and streamline business operations. By leveraging AI technologies, retailers can analyze large volumes of sales, inventory, and customer data in real time, enabling more informed planning and faster responses to changing market demands. AI is also being used to automate reporting, optimize inventory management, personalize customer interactions, and predict future buying trends. Additionally, retailers are utilizing AI to improve operational efficiency, enhance collaboration, and support responsible decision-making across departments. Through strategic implementation, AI and Microsoft 365 Copilot are helping retailers create more efficient, agile, and customer-focused business environments.

How to Integrate AI into Retail Workflows

To successfully integrate AI and Microsoft 365 Copilot into retail operations, a structured approach is essential. Retail organizations need to focus on data-driven insights, responsible AI adoption, workflow optimization, and continuous evaluation to ensure AI improves productivity, customer experiences, and business efficiency.

Below are the key steps to integrate AI into retail workflows



Figure 4: Key Steps to Integrate AI in Retail Workflows

By following these steps, AI and Microsoft 365 Copilot can be effectively integrated into retail operations, improving efficiency, decision-making, collaboration, and overall business outcomes.

Module 1: Foundations of AI & Microsoft 365 Copilot in Retail

Artificial intelligence is transforming the retail industry by changing how organizations understand customers, manage operations, optimize inventory, and make business decisions. Before applying advanced Copilot capabilities, professionals need to understand the fundamentals of AI, retail transformation, Microsoft 365 Copilot, and how intelligent technologies support modern retail workflows.

In this module, you will learn the foundations of AI in retail and explore how Microsoft 365 Copilot enables smarter decision-making across merchandising, marketing, sales, and store operations. You will understand Copilot's role in improving productivity, integrating retail data, enhancing customer experiences, and supporting secure and responsible AI adoption.

Module 2: Core Copilot Skills for Retail

Effective use of Microsoft 365 Copilot requires understanding how AI assistants work across everyday productivity applications and how prompts influence AI-generated results. Retail professionals need practical skills to use Copilot for documentation, analysis, communication, collaboration, and business planning.

In this module, you will learn how to use Copilot across Microsoft 365 applications, including Word, Excel, PowerPoint, Teams, and Outlook. You will explore prompt engineering techniques, strong and weak prompts, retail-specific workflows, store layout planning, seasonal campaign creation, and AI-powered sales strategies.



Module 3: Advanced Copilot Applications in Retail

Modern retailers generate large volumes of sales, inventory, customer, and operational data. AI helps organizations transform this information into actionable insights by predicting trends, identifying opportunities, and supporting proactive business decisions.

In this module, you will learn how Microsoft 365 Copilot supports advanced retail operations through predictive analytics, inventory optimization, performance tracking, and operational intelligence. You will explore AI-driven approaches for stock shortage prediction, demand forecasting, customer insights, promotional analysis, and improving retail decision-making through data-driven strategies.

Module 4: Copilot Studio Agents for Retail

AI agents are becoming an important part of modern retail transformation by enabling organizations to automate workflows, provide intelligent assistance, and support employees with real-time information. Understanding how to design and use AI agents helps retailers create more efficient and scalable business processes.

In this module, you will learn the fundamentals of Copilot Studio and how retail organizations can create AI-powered agents for store operations, customer support, knowledge management, and employee assistance. You will explore agent design concepts, data connections, workflow automation, responsible deployment, and practical retail use cases.

Module 5: Optimizing Copilot in Retail

Successful AI adoption requires more than implementing technology. Retail organizations must optimize Copilot usage by aligning AI capabilities with business goals, employee workflows, and operational requirements.

In this module, you will learn how to improve Copilot effectiveness across retail functions by optimizing prompts, refining workflows, improving collaboration, and measuring business impact. You will explore strategies for increasing productivity, enhancing merchandising decisions, improving customer engagement, and maximizing the value of AI-powered retail solutions.

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

Responsible AI adoption is essential for maintaining customer trust, protecting sensitive information, and ensuring ethical use of AI technologies. Retail organizations must establish policies and governance practices to manage AI risks while maximizing business benefits.

In this module, you will learn responsible AI principles, data security practices, privacy protection, compliance requirements, and ethical AI approaches for retail environments. You will explore Microsoft Responsible AI principles, Purview compliance capabilities, human oversight, data governance, and methods for ensuring safe and trustworthy Copilot adoption.

Module 7: Capstone Project — End-to-End Retail Transformation with Copilot

Applying AI knowledge to realistic retail scenarios is essential for developing practical expertise. The capstone project allows learners to combine Copilot skills, retail knowledge, data analysis, and responsible AI practices to solve business challenges.

In this module, you will complete an end-to-end retail transformation project by analyzing a retail business scenario, identifying operational challenges, designing Copilot-powered solutions, developing AI-driven workflows, and presenting recommendations. You will apply concepts from the entire course to demonstrate how Microsoft 365 Copilot can improve retail productivity, customer experiences, and business performance.

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.

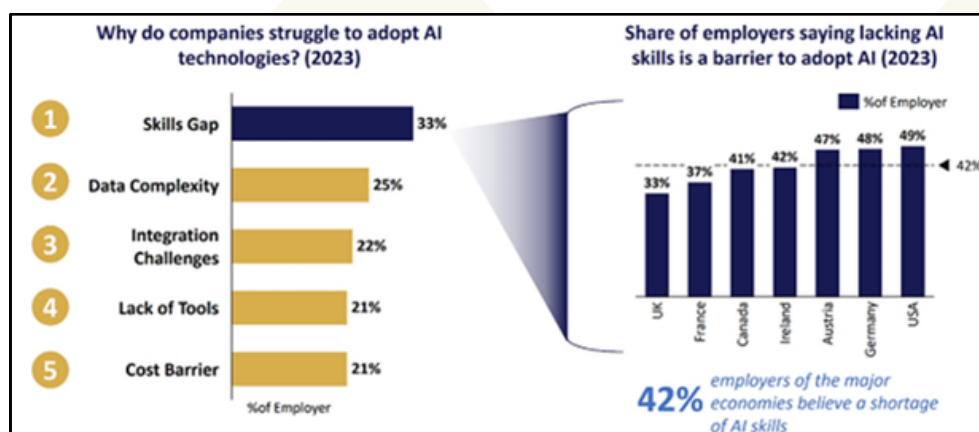


Figure 5: Factors determining the lack of adopting AI Technologies

Source: OCED and IBM

Bridging the AI Skill Gap

- **Challenge:** Many retail professionals struggle to understand and apply AI-powered solutions due to limited knowledge of artificial intelligence, Microsoft 365 Copilot capabilities, and AI-driven retail workflows. This gap makes it challenging to effectively implement AI for customer personalization, inventory optimization, productivity improvement, and data-driven decision-making.
- **Solution:** The AI+ Microsoft 365 Copilot Retail Specialty certification provides specialized training that bridges the gap between retail operations and artificial intelligence. This certification equips professionals with practical knowledge of AI fundamentals, Copilot applications, retail analytics, prompt engineering, workflow automation, customer engagement, and responsible AI practices to enhance retail capabilities.
- **Benefit:** By completing this training, retail professionals gain the skills to apply AI effectively across daily operations, improve decision-making, automate workflows, and deliver personalized customer experiences. Organizations benefit from more productive teams, smarter retail strategies, improved operational efficiency, and enhanced customer satisfaction.

Empowering Professionals with AI Skills

- **Challenge:** Retail professionals often face difficulties keeping pace with changing customer expectations, evolving digital technologies, and increasingly complex retail operations. Without practical knowledge of AI-powered tools and Microsoft 365 Copilot, teams may struggle to analyze business data, automate routine tasks, personalize customer experiences, and adapt to modern retail demands.
Solution: The AI+ Microsoft 365 Copilot Retail Specialty certification provides comprehensive training on AI-driven retail practices, including Copilot applications, prompt engineering, retail analytics, inventory optimization, customer personalization, workflow automation, data integration, and responsible AI. The course prepares professionals to integrate AI into everyday retail workflows and address operational challenges.
- **Benefit:** By developing AI and Copilot expertise, professionals can improve decision-making, streamline communication, optimize retail operations, and deliver more personalized customer experiences. This enables organizations to increase productivity, respond faster to market changes, strengthen collaboration, and create a more intelligent and customer-focused retail environment.

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.



aicerts.ai

Contact

252 West 37th St., Suite 1200W
New York, NY 10018

