Generating value through Microsoft 365 Copilot

An AI playbook for nonprofits

Generating value through Microsoft 365 Copilot

Use case by department

Copilot can simplify the everyday tasks performed by employees and volunteers. Look at key use cases and how Copilot can be your AI assistant along the way.
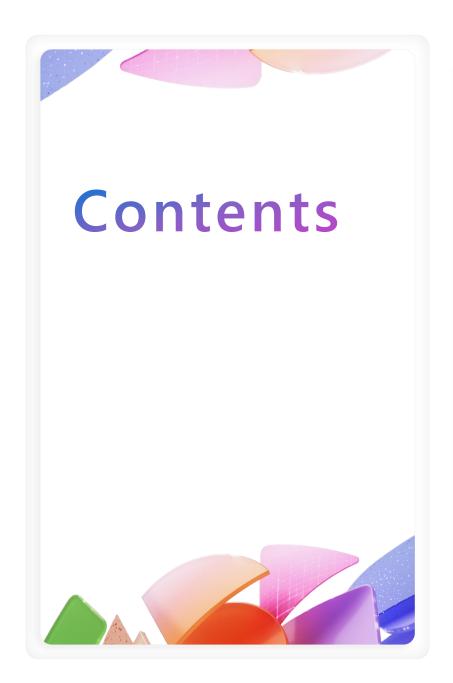
Potential benefits

Implementing Copilot can have numerous benefits, including saving time, increasing the quality of presentations, and summarizing documentation.

Day in the life

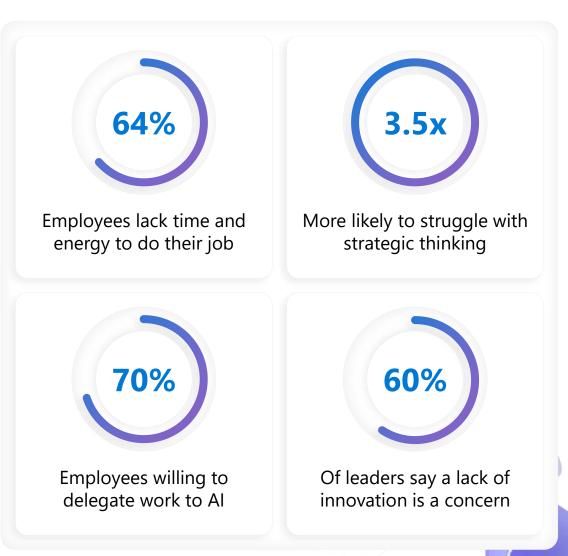See how real-life employees are using Copilot in their day-to-day, across different departments.

Contents

01

Introduction

Empowering growth: Embracing AI trends

> " Employees are ready to embrace AI."

64%
Employees lack time and energy to do their job

3.5x
More likely to struggle with strategic thinking

70%
Employees willing to delegate work to AI

60%
Of leaders say a lack of innovation is a concern

The background and vision

Employees across the world today are facing an unseen challenger at work in that the pace of their work has accelerated far faster than they can keep up with, and this is costing their organizations valuable time that could be better spent innovating.

"
_____

There is a growing concern among both employees and employers about how maximizing their productivity often leaves them with little time for more creative and innovative work."

"
_____

There is a large number of professionals in the workforce today who are looking forward to the next-generation of AI helping lift the weight of work."

<u>**Employees are willing to embrace responsible AI in every aspect of their work:**</u>

Admin tasks

Analytical work

Creative work

Finding information and answers

Summarizing meetings and action items

Planning their day

"
_____

Facilitate the meaningful adoption of Copilot within the nonprofit sector, and empower the sector and its employees to carry out their missions more efficiently, at an agile pace, and with potentially higher quality"

02

Nonprofit use cases and
a day in the life views

Foundational Microsoft 365 Copilot use cases: Sustaining relevance in the nonprofit sector

1 — **Recap a meeting**

Let Copilot keep track of key topics and action items so you can stay focused during the meeting and avoid listening to the recording after.

» Draft an email with notes and action items from meeting.

2 — **Summarize an email thread**

Get quickly caught up to a long, complex email thread.

» Click on the Summarize icon.

3 — **Draft email**

Personalize the tone and length.

» Draft an email to [name] that informs them that [Project X] is delayed two weeks. Make it short and casual in tone.

4 — **Summarize a document**

Get right down to business by summarizing long documents and focusing on the relevant sections.

» Give me a bulleted list of key points from /[file X].

5 — **Tell me about a topic/project**

Provide insights and analysis from across multiple sources to get up to speed quickly.

» Tell me what's new about topic organized by emails, chats, and files?

6 — **Give me some ideas for**

Boost your creativity with ideas for your work such as agendas, product names, social media posts, etc.
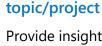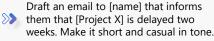
» Suggest 10 compelling taglines based on file.

7 — **Help me write ...**

Jumpstart creativity and write and edit like a professional by getting a first draft in seconds.

» Generate three ways to say [X].

8 — **What did they say ...**

When you vaguely remember someone mentioning a topic, have Copilot do the research.

» What did [Person X] say about [Topic X]?

9 — **Revise this content**

When you've got a rough draft of an idea, turn it into usable text and then vary the length and tone.

» Rewrite with Copilot.

10 — **Transform from Word to PowerPoint**

When you want to summarize the information from a Word document into a PowerPoint presentation.

» Create presentation from/[file X].

Marketing

Using Microsoft 365 Copilot in marketing

Goals and challenges

Goals: Increasing awareness about nonprofit cause and objectives; expanding donor base; engaging communities through promotion, outreach, and events; and developing links with partner organizations and supporters.

Challenges: Limited resources, including time, budget, and staff, can pose challenges in measuring marketing's impact on a nonprofit's mission. Balancing effective communication with supporters and volunteers while adhering to regulations.

Copilot can assist with …

- Research: Identify trends and segments
- Create: Draft and develop a campaign
- Promote: Share and mobilize
- Research: Identify key metrics to monitor
- Promote: Monitor campaign impact through social media content analysis
- Analyze: Make data insights accessible to nonprofit users who are non-data experts

Marketing roles

- Chief Marketing Officer
- Communications Manager
- Director of Marketing
- Director of Policy, Advocacy, and Campaigns
- Marketing Manager
- PR Manager

Copilot use cases and potential benefits

Identify trends and segments
Analyzing the target demographic's needs and preferences to inform program development and service impact. Identifying prospective donors, revenue sources, and partners.

Draft and develop a campaign
Defining new project goals and audience engagement strategies. Pinpointing promotional opportunities, partnerships for increased impact, and crafting the creative direction in collaboration.

Share and mobilize
Leveraging platforms to broadcast campaign messages and reach target demographics. Harnessing social media, outreach, and branding to amplify impact and drive engagement.

Identify key metrics to monitor
Identifying key metrics to monitor is important to gauge success, refine strategies, and allocate resources efficiently.

Monitor campaign impact through social media content analysis
Monitoring campaign impact through social media content analysis is crucial for understanding audience engagement, optimizing messaging, and driving strategic decisions.

Make data insights accessible to nonprofit users who are non-data experts
Ensuring that individuals without expertise in data can easily understand and utilize insights is crucial for informed decision-making and organizational effectiveness.

Accelerate growth   Cost savings and avoidance   Donor attraction

Identify trends and segments

Identifying trends and segments is crucial for a marketing department as it enables targeted strategies that resonate with specific audiences and capitalize on emerging market opportunities.

Benefits of using Copilot to help identify trends and segments

Improve decision-making

- Data-driven decision-making by analyzing large volumes of data on potential donors and recipients.
- Staying on top of social/market trends and opportunities for analyzing public sentiment.
- Enhanced understanding of target demographics/segments facilitates fast-paced and tailored communication.

Roles

- Chief Marketing Officer
- Director of Marketing
- Marketing Manager

Microsoft AI solutions

- Microsoft 365 Copilot
- Microsoft Copilot

Share and mobilize

Sharing and mobilizing information is essential for fostering collaboration, ensuring alignment on goals, and swiftly executing campaigns that drive growth and stakeholder engagement.

Benefits of using Copilot to share and mobilize

Improve analysis

- Processing and analyzing samples of data from social media to inform campaign progress in real time and aid data-driven decision-making.

Maximizing reach

- Efficient and effective communications tailored to segment needs.
- Maximizing "shareability," fostering greater impact and reach into communities.

Roles

- Chief Marketing Officer
- Director of Marketing
- Marketing Manager
- Content Creator

Microsoft AI solutions

- Microsoft 365 Copilot
- Microsoft Copilot

Draft and develop a campaign

Drafting and developing a campaign is fundamental for a marketing department to articulate a cohesive message, engage effectively with stakeholders, and achieve strategic business objectives.

Roles

- Chief Marketing Officer
- Director of Marketing
- Marketing Manager
- Content Creator

Benefits of using Copilot to draft and develop a campaign

Improve brand recognition

- Quickly draft different versions of copy and branding/creative assets.
- Support regeneration and integration of branding.

Support development

- Support collaboration within and between teams, and with external partners.
- Explore and develop strategic marketing plans and campaigns.

Microsoft AI solutions

- Microsoft 365 Copilot
- Microsoft Copilot

Identify key metrics to monitor

Tracking key metrics enables informed decision-making and strategy optimization for marketing effectiveness.

Benefits of using Copilot to identify key metrics to monitor

Data-driven insights

- Uncover trends from marketing data to guide campaign adjustments.
- Measure performance against objectives to identify areas for improvement.
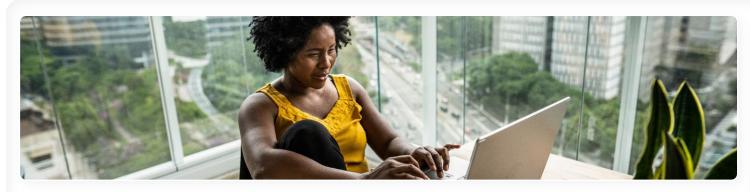
Strategy refinement

- Tailor marketing strategies based on analytical evidence for better outcomes.
- Optimize resource allocation by focusing on high-impact metrics.

Roles

- Chief Marketing Officer
- Director of Marketing
- Marketing Manager
- Content Creator

Microsoft AI solutions

- Microsoft 365 Copilot
- Microsoft Copilot

Monitor campaign impact through social media content analysis

Monitoring campaign impact via social media content analysis provides insights into audience engagement and helps tailor future marketing efforts for better resonance.

Benefits of using Copilot to monitor campaign impact through social media content analysis

Engagement analysis

- Examine audience interaction samples to gauge campaign resonance and effectiveness.
- Identify which social media posts generate the most user activity.

Content optimization

- Refine messaging based on audience response to increase relevance.
- Adjust content strategy to boost visibility and engagement rates.

Roles

- Chief Marketing Officer
- Director of Marketing
- Marketing Manager
- Content Creator

Microsoft AI solutions

- Microsoft 365 Copilot
- Microsoft Copilot

Make data insights accessible to nonprofit users who are non-data experts

Making data insights accessible to non-experts democratizes information, fostering informed decisions across the organization without technical barriers.

Benefits of using Copilot to make data insights accessible to nonprofit users who are non-data experts

Simplifies complexity
- Enables quick comprehension of analytics through user-friendly interfaces.

Broadens understanding
- Empowers all team members to make data-informed decisions.
- Facilitates knowledge sharing across departments, enhancing collaborative efforts.

Roles
- Chief Marketing Officer
- Director of Marketing
- Marketing Manager
- Content Creator

Microsoft AI solutions
- Microsoft 365 Copilot
- Microsoft Copilot

Marketing | Identify trends and segments

| Save time | Improve presentation quality | Avoid simple tasks |

Draft research brief

Prompt Microsoft 365 Copilot in Word to create draft briefs based upon existing content.

Microsoft 365 Copilot in Word

Draft brief for upcoming research, summarize documents and content.

> Copilot can summarize and draft documents based on multiple files.

Discover market research

Copilot can observe sector trends by reviewing competitors' online activities, offering valuable benchmarks for enhancing community outreach and supporter involvement.

Microsoft 365 Copilot in Edge

Analyze online activities of similar nonprofits to summarize their engagement strategies and marketing approaches.

Learn about your audience

Analyze data from donor-provided information and donation amounts/regularity to explore relationships between segments and giving patterns.

Microsoft 365 Copilot

Analyze data in our existing donor base, focusing on relationships between demographics and giving patterns.

> Tailor prompts according to business need.

Discover market trends and generate visual insights

Use Copilot to generate data insights and provide clear visualizations.

Microsoft 365 Copilot in Excel

Show data insights in Microsoft 365 Copilot in Excel. **Create a pie chart** of existing donor age breakdown.

Summarize interviews

Use Copilot to record findings from research interviews by providing and summarizing transcripts.

Microsoft 365 Copilot in Microsoft Teams

Summarize interview transcripts.

> Ask Copilot to highlight responses that contain references to specific key information.

Identify themes

Accelerate analysis by prompting Microsoft 365 Copilot in Word to identify key themes in your interview data.

Microsoft 365 Copilot in Word

Paste Microsoft Teams summaries into a Word document and prompt Copilot to show you themes.

> Themes can be revised in Copilot according to research requirements.

Marketing | Draft and develop a campaign

Potential benefits

| Save time | Improve presentation quality | Avoid simple tasks |

Discover opportunities

Use the Edge sidebar prompt to search for new opportunities.

Microsoft 365 Copilot in Edge

Identify effective promotional opportunities and potential partnerships within the area of...

> Copilot can browse the internet and provide suggestions consistent with organization values.

Widen reach

Create versions of slides to appeal to different audience segments.

Microsoft 365 Copilot in PowerPoint

Try a new design.

> Copilot can change the theme and offer multiple options

Execute your campaign

Create tailored messages to each of your communication channels to drive engagement.

Microsoft 365 Copilot

Create a series of social media posts based on existing campaign documents, tailored to audience segments.

Create a campaign email

Start in a new email, prompt Copilot in Outlook.

Microsoft 365 Copilot in Outlook

Draft emails including campaign taglines and key information.

Adapt in real time

Evaluate reception to campaign and prompt Copilot to revise messaging according to relevant developments.

Microsoft 365 Copilot

Revise these social media posts to incorporate new developments in the area, including...

> Add specific tone requests to reflect existing response to campaign, e.g., gratitude for donor generosity.

Review and reflect

Analyze data on campaign impact and compare against KPIs.

Microsoft 365 Copilot in Excel

Show all data insights.

> Copilot can prioritize insights aligned with organizational objectives, e.g., by adding mission statement information to the prompt.

Marketing | Share and mobilize

| Save time | Improve presentation quality | Avoid simple tasks |

Strategize

Leverage insights to draft a strategy document for brand awareness using Microsoft 365 Copilot in Word.

Microsoft 365 Copilot in Word

Draft three versions of a brand awareness document based upon the branding found in "Branding doc."

> Copilot can produce various draft documents, which allows the user to use the desired draft.

Brainstorm

Use Microsoft 365 Copilot in Word to jumpstart brainstorming ideas, leverage the draft marketing plan in the ideation.

Microsoft 365 Copilot in Word

Based on this draft marketing plan, suggest creative ways to introduce our new campaign to potential donors, for team discussion.

> Specify options that have already been tried to generate new ideas.

Enhance collaboration

Use Microsoft 365 Copilot in Microsoft Teams to summarize key meetings, identify most frequent questions, and action items.

Microsoft 36 Copilot in Microsoft Teams

Extract action items from this meeting.

> Copilot can record decisions and allocate action items to specific individuals.

Whiteboard ideas

Use Microsoft 365 Copilot in Whiteboard to brainstorm ideas around the assets needed for the campaign.

Microsoft 365 Copilot in Whiteboard

Suggest a list of assets required for a new campaign launch for a nonprofit.

> Copilot can break down the process into specific suggested steps.

Generate ideas

Use the AI language model to generate tagline ideas for the campaign.

Microsoft 365 Copilot

Generate a selection of suggested taglines using existing campaign documents.

> Revise for content and tone, e.g., "Show me some options with more humor."

Create materials

Create a pitch deck for the campaign from existing documents.

Microsoft 365 Copilot in PowerPoint

Generate a pitch deck for the campaign from the /[Children's Rights Campaign 2024] document.

> Specify the number of slides and what information the deck should contain, including notes.

Marketing | Identify key metrics to monitor

Potential benefits

| Improve accuracy | Data-led decision-making | Maximize impact |

Receive tailored suggestions

Input your mission plan and goals into Copilot and ask it to suggest relevant metrics to track progress towards those goals.

Microsoft 365 Copilot

Our organizational mission is outlined in the/[Our Objectives] document; **suggest relevant quantitative and qualitative metrics** that we should monitor to track our impact and outreach effectively.

Automated data analysis

Feed Copilot data from various sources (e.g., social media analytics, website traffic, email campaign statistics) and ask it to generate reports highlighting insights and key trends to monitor.

Microsoft 365 Copilot in Edge

Analyze the provided data from this Excel file /[Website Traffic May 2024], to generate a report showcasing key insights to monitor.

Marketing campaign optimization

Share results of different campaigns with Copilot, leveraging its analytical precision to interpret outcomes and guide enhancing future initiatives for improved engagement and conversion rates.

Microsoft 365 Copilot in Excel

Perform regression analysis on /[Campaign Outcome Data 2023] to understand relationship between conversion rates and other variables.

> Data insights can be provided in various formats if specifically requested., e.g., "provide ten bullet points outlining key recommendations."

Marketing | Monitor campaign impact through social media content analysis

Potential benefits   Objectively assess impact | Deeper understanding of effectiveness | Inform data-driven decisions

Reporting and visualization

Copilot can generate reports and visualizations that make it easier to understand social media analytics. These reports can be shared with stakeholders to demonstrate the campaign's impact.

Microsoft 365 Copilot in Excel

Create a visual report of social media analytics data collected in this Excel file by the marketing team for the campaign to present impact to stakeholders.

Provide a report of collected or downloaded data for Copilot to analyze.

Content categorization

Use Copilot to categorize social media posts by topic or theme to understand which aspects of the campaign are driving the most conversation.

Microsoft 365 Copilot in Word

Group social media posts included in this Word document by theme to show key overarching areas of discussion.

Sentiment analysis

Use Copilot natural language processing to assess the sentiment of social media posts and comments related to the campaign, determining whether the response is positive, negative, or neutral.

Microsoft 365 Copilot in Word

Analyze sentiment of campaign-related social media posts included in this Word document, categorizing them as positive, negative, or neutral.

Have Copilot suggest key illustrative quotes for each sentiment category.

Marketing | Make data insights accessible to nonprofit users who are non-data experts

Potential benefits

| Empower staff | Make data-driven decisions | Enhance campaign effectiveness |

Simplified reporting

Copilot can generate easy-to-understand reports and visualizations, translating complex data into clear insights for non-data expert nonprofit users.

📊 **Microsoft 365 Copilot in Power BI**

Create a user-friendly report from provided data file summarizing key data insights with visual aids for easy interpretation by staff without data expertise.

Natural language queries

Enable users to ask questions in plain language and receive data-driven answers, making the process of extracting insights from data more intuitive.

📗 **Microsoft 365 Copilot in Excel**

Compare the conversion rates of "Campaign A" and "Campaign B" and determine if there is a statistically significant difference in their performance.

Automated analysis recommendations

Provide automated insights into key performance indicators and trends, helping users focus on the most relevant data without needing deep analytical skills.

📗 **Microsoft 365 Copilot in Excel**

Highlight essential performance indicators and emerging trends from our data to guide non-data expert nonprofit users in decision-making.

A day in the life of a Digital Marketing Lead

8:00 AM

Before meeting with his team to discuss an ongoing campaign, Daichi uses Copilot's natural language processing to assess the sentiment of social media posts and comments related to the campaign.

> **Analyze sentiment of campaign-related social media posts** included in this Word document, categorizing them as positive, negative, or neutral.
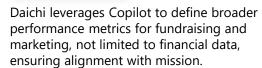
8:30 AM

Daichi leverages Copilot to define broader performance metrics for fundraising and marketing, not limited to financial data, ensuring alignment with mission.

> **List key non-financial metrics** for nonprofit fundraising and marketing to track impact and engagement.

10:00 AM

Daichi meets with his team to plan a new social media campaign based on data insights. Copilot generates ideas to brainstorm that are consistent with the organization's values.

> **Brainstorm campaign concepts** utilizing insights from donor behavior and aligning with the values and objectives outlined in the /[Our Values] document.
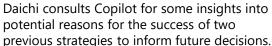
11:00 AM

Daichi is not a data expert, so he uses Copilot to make data insights accessible to himself and his team.

> **Show all data insights.**

> Prompt can be adapted to any specific data insight needs, e.g., **show data insights** from March 2020.

2:00 PM

Daichi consults Copilot for some insights into potential reasons for the success of two previous strategies to inform future decisions.

> **Analyze and summarize key factors behind the success of the past two strategies** included in this document to inform future decision-making.

4:00 PM

Daichi works across multiple areas and has limited time for technical training. He uses Copilot to summarize technical guidance and maximize his data literacy.

> **Extract key concepts and capture case studies relevant to nonprofits** from these technical guidance documents.

Daichi is a Digital Marketing Lead

Fundraising

Using Microsoft 365 Copilot in fundraising

Goals and challenges

Goals: Expand donor base and increase social media presence to attract more funding. Fostering donor relationships with current and new donors, improve fundraising campaign effectiveness, and leveraging technology for efficient operations.

Challenges: Expanding the donor base and enhancing social media visibility in a crowded landscape. Ensuring the establishment of consistent funding streams, given the complexities involved in grant applications and reporting.

Copilot can assist with ...

- Grant management: Grant writing proposal
- Grant management: Grant tracking and reporting
- Donor management: Donor recognition
- Donor management: Network expansion
- Donor management: Donor campaign planning and design
- Fundraising strategy and communications: Predictive analysis for increased donations
- Fundraising strategy and communications: Analyze donor datasets for optimum donation value request
- Donor management: Data-led insights into crafting donor experiences

Fundraising roles

- Major Gifts Officer
- Chief Philanthropy Officer
- Grant Manager
- Director of Development

Microsoft Copilot use cases and potential benefits

Use case	Benefit
Grant writing proposal	For fundraisers, a strong grant proposal is essential, aligning goals with the grantor's mission for securing substantial funding.
Grant tracking and reporting	Nonprofits monitor grants and report outcomes to adhere to guidelines, show results, build trust, and secure future funding.
Donor recognition	Donor recognition tactics thank supporters, fostering engagement and sustaining their commitment to objectives.
Network expansion	Expanding donor networks is key for growth and support. Social media and events help build partnerships to broaden a cause.
Donor campaign planning and design	Campaign planning involves crafting compelling narratives and visuals to increase donations and support for our cause.
Predictive analysis for increased donations	Analyzing data informs optimal timing and targets for fundraising, enhancing earnings and attracting new or larger donations.
Analyze donor datasets for optimum donation value request	Analyzing donor datasets to determine the ideal donation request is important for maximizing fundraising potential and respecting donor capacity.
Data-led insights into crafting donor experiences	Utilizing data-driven insights to shape donor experiences is crucial for building lasting relationships and enhancing donor satisfaction and loyalty.

Increased donations   Effective insights   Grant process efficiency

Grant writing proposal

Grant writing proposals are essential for obtaining financial support, enabling organizations to execute impactful projects and sustain their operations.

Roles

- Major Gifts Officer
- Director of Development
- Grant Manager
- Chief Philanthropy Officer

Benefits of using Copilot to help grant proposal writing

Streamlined proposal process
- Automation of data aggregation and formatting accelerates proposal creation, increasing overall efficiency in grant writing.

Strategic insight enhancement
- The ability to analyze previous successful grants to offer insights on effective structuring and content strategies for new proposals.

Microsoft AI solutions

- Microsoft 365 Copilot
- Microsoft Copilot

Grant tracking and reporting

Grant tracking and reporting ensure transparency, measure progress, and demonstrate accountability to funders, which is essential for maintaining trust and securing future funding.

Benefits of using Copilot to help grant tracking and reporting

Efficiency and clarity boost

- Streamline grant tracking, unlock insights into successful applications, and save time to support future funding.

- Enhances transparency and accountability through regular reporting, while saving time creating the reports.

Proactive status tracking

- Provides real-time updates on grant status, enabling proactive decision-making.

Roles

- Major Gifts Officer
- Director of Development
- Grant Manager
- Chief Philanthropy Officer

Microsoft AI solutions

- Microsoft 365 Copilot
- Microsoft Copilot

Donor recognition

Donor recognition is important because it acknowledges contributions, fosters ongoing support, and strengthens relationships with benefactors who are vital to an organization's success.

Benefits of using Copilot to help donor recognition

Retention through recognition
- Enhanced efficiency in recognizing donors, aids with donor retention.
- Personalized communication with donors can be created.

Personalized donor outreach
- Foster strong relationships with additional communication features.
- Save time when visually appealing recognition materials can be generated.

Roles
- Major Gifts Officer
- Director of Development
- Grant Manager
- Chief Philanthropy Officer

Microsoft AI solutions
- Microsoft 365 Copilot
- Microsoft Copilot

Network expansion

Network expansion is important because it broadens an organization's reach, creates new opportunities for collaboration, and enhances its ability to achieve its mission.

Benefits of using Copilot to help network expansion

Brand awareness efficiency
- More efficient methods of brand awareness can attract more attention and support from individuals or organizations.

Communication enhancement
- Improved communication with networking prospects and assistance when writing emails.

Roles

- Major Gifts Officer
- Director of Development
- Grant Manager
- Chief Philanthropy Officer

Microsoft AI solutions

- Microsoft 365 Copilot
- Microsoft Copilot

Donor campaign planning and design

Donor campaign planning and design are crucial for effectively communicating an organization's cause, engaging potential supporters, and maximizing fundraising efforts.

Roles

- Major Gifts Officer
- Director of Development
- Grant Manager
- Chief Philanthropy Officer

Benefits of using Copilot to help donor campaign planning and design

Engagement and efficiency

- Enhances efficiency in outreach strategies, saving time and resources.
- Increase donor engagement through compelling narratives.

Brand identity enhancement

- Strengthens brand identity through cohesive design elements.

Microsoft AI solutions

- Microsoft 365 Copilot
- Microsoft Copilot

Predictive analysis for increased donations

Predictive analysis for increased donations is vital as it helps organizations anticipate giving trends, tailor fundraising strategies, and optimize donor engagement for better financial outcomes.

Benefits of using Copilot to help predictive analysis for increased donations

Conversion maximization
- The efficiency efforts are increased, leading to potential higher conversion rates and a more cost-effective allocation of marketing resources.
- Helps predict donor behavior for more effective fundraising strategies.

Optimized campaign timing
- Timing campaigns effectively can increase donor response rates, and the total amount of donations received.

Roles
- Major Gifts Officer
- Director of Development
- Grant Manager
- Chief Philanthropy Officer

Microsoft AI solutions
- Microsoft 365 Copilot
- Microsoft Copilot

Analyze donor datasets for optimum donation value request

Analyzing donor datasets for optimum value requests maximizes fundraising efficiency by aligning donation appeals with individual donor capacity and inclination.

Benefits of using Copilot to help analyze donor datasets for optimum value request for donations

Maximizes donations
- Maximize potential donation amount by suggesting an appropriate amount.
- Identifies donation patterns to set realistic and achievable fundraising targets.

Roles

- Major Gifts Officer
- Director of Development
- Grant Manager
- Chief Philanthropy Officer

Microsoft AI solutions

- Microsoft 365 Copilot
- Microsoft Copilot

Data-led insights into crafting donor experiences

Data-led insights enable the crafting of personalized donor experiences, enhancing satisfaction, and fostering long-term supporter relationships.

Roles

- Major Gifts Officer
- Director of Development
- Grant Manager
- Chief Philanthropy Officer

Benefits of using Copilot to help data-led insights into crafting donor experiences

Personalized engagement
- Designs unique donor journeys based on individual giving history and preferences.
- Enhances donor satisfaction with customized acknowledgments and updates.

Donor retention
- Encourages long-term support by aligning experiences with donor expectations.

Microsoft AI solutions

- Microsoft 365 Copilot
- Microsoft Copilot

Fundraising | Grant proposal writing

Improve understanding	Improve quality and presentation	Avoid simple tasks

Create first draft proposal

Prompt Microsoft 365 Copilot in Word to create draft briefs based upon specific criteria.

Microsoft 365 Copilot in Word

Write a three-page grant proposal, adopt the tone of a short timeline for funding approval. The content should outline...

Market research

Use AI to search and compile financial trends from successful grant proposals and funder preferences to inform and enhance your grant application strategy.

Microsoft 365 Copilot in Edge

Search and summarize key financial elements from successful grant proposals and funder reports to guide our grant application financial strategy.

Have Copilot browse the internet and research key areas of interest.

Analyze datasets for key insights

Show insights from the data which you have gathered to understand the data better.

Microsoft 365 Copilot in Excel

Show data insights on the/[Grant Approval] spreadsheet.

Data insights could be in tabular or graph form, if specifically requested.

Fundraising | Grant tracking and reporting

| Save time | Improve data quality | Avoid simple tasks |

Automate data entry and identify outliers

Copilot can automate data entry and remove any data that will change results.

Microsoft 365 Copilot

Create a script to auto-populate Excel with grant data from CSVs and highlight entries that could skew our grant tracking results.

Generate reports

Create reports in Power BI to see your report request visually.

Microsoft 365 Copilot in Power BI

Generate a report that shows me the number of successful grant applications.

> Microsoft 365 Copilot in Power BI can generate various reports and visuals based on the request of the user.

Standardized grantee report forms

Use Microsoft 365 Copilot in Word to create standardized template for grantees to supply information in an easy-to assess format.

Microsoft 365 Copilot in Microsoft Teams

Generate a template to assist grantees returning a progress update on the usage of a grant. Include sections for grantee information, financials, project progress, outcomes, challenges, future plans, and supporting documentation.

Fundraising | Donor recognition

| Save time | Improve understanding | Accelerate expressing gratitude to donors |

Analyze data to gain insights

Analyze donor data to gain insights for who has donated.

Microsoft 365 Copilot in Excel

Create a table showing me the names of who donated, with the total amount and date of donation.

Draft tailored emails

Starting in a new email, prompt Microsoft 365 Copilot in Outlook to draft the email to a specific contact, including any key points.

Microsoft 365 Copilot in Outlook

Draft a tailored email for our donor, inviting them to an upcoming fundraising event and highlighting the impact of their previous contribution.

Social media recognition

Use Copilot to generate thank you posts at each fundraising milestone, recognizing individual major donors.

Microsoft 365 Copilot

Generate thank you posts for various social media platforms to thank donors. Individually mention [donor's name], to thank them for their generous donation.

Fundraising | Network expansion

Save time	Improve quality and presentation	Improve understanding

Discover opportunities

Discover potential donors or partners.

Microsoft 365 Copilot

Find potential donors or partners who align with our mission, outlined in /[Mission] document.

> You can provide Copilot with the nonprofit's mission and ask it to scan the internet for potential donors or partners to match.

Draft compelling emails

Draft a well scripted email to create a new partnership proposal.

Microsoft 365 Copilot in Outlook

Compose an email proposing a partnership with [potential partner's name] including possible funding, outlining how our mutual goals align and the potential benefits of our collaboration. Use the information below to guide content...

Create first draft document

Prompt Microsoft 365 Copilot in Word, include important information or tone of the text.

Microsoft 365 Copilot in Word

Create a comprehensive donor information pack, detailing our mission, the impact of our work, and how donations are utilized. Use the /[Key information] document for required information.

Fundraising | Donor campaign planning and design

Potential benefits

| Save time | Improve data quality and insights | Avoid simple tasks |

Draft content for a donor campaign

Prompt Microsoft 365 Copilot in Word to create draft briefs based upon certain criteria.

Microsoft 365 Copilot in Word

Create a donor campaign, aimed at raising funds to build sustainable housing for families in need. Make it engaging for our audience and include public recognition for our significant donors, detailed in /[Significant Donors].

Analyze data to gain insights

Identify trends in the data to view the preferences of previous significant donors.

Microsoft 365 Copilot in Excel

Generate a list of donors, who donated above $50,000 last year.

> Copilot can identify various trends within a specified dataset and produce tailored insights to the user's needs.

Design a donor campaign presentation

Use Microsoft 365 Copilot to create a draft PowerPoint presentation which will be the foundation of a new campaign.

Microsoft 365 Copilot in PowerPoint

Create a draft presentation for our new donor campaign "Education for all," including slides on the campaign overview, fundraising goals, potential impacts, and ways for donors to contribute. Base this on the /[Education for all Campaign overview] document.

Fundraising | Predictive analysis for increased donations

Save time	Improve data quality	Avoid simple tasks

Analyze and forecast trends

Analyze donation trends and forecast the best times to approach donors.

X **Microsoft 365 Copilot in Excel**

Analyze the dataset for donation amounts over time, **forecasting** when the best times are to approach donors over the next three months.

Create visual insights

Visualize the donation amounts and generate a potential donation amount.

X **Microsoft 365 Copilot in Excel**

Generate a line graph for donation amounts over time and **generate a potential donation amount** from [Client A], which would maximize the potential donation made.

Create draft emails

Draft tailored emails to potential donors.

O **Microsoft 365 Copilot in Outlook**

Generate an email which will be sent to [potential donor's name], outlining the new campaign and including the benefits of the campaign and benefits for the donor. Base this on the information below...

Fundraising | Analyze donor datasets for optimum donation value request

Potential benefits

| Enable precise request tailoring | Data-driven decision-making | Boost fundraising |

Donor segmentation

Analyze donor datasets to segment donors based on their giving history, frequency, and amount, helping to tailor donation requests for optimal value.

Microsoft 365 Copilot in Excel

Analyze the giving patterns in our donor database to segment donors effectively and customize our donation requests for better results.

Predictive donation modelling

Predict future giving patterns and suggest the ideal donation request amounts based on past donor behavior and demographic data.

Microsoft 365 Copilot in Excel

Use historical donor data to model and predict optimal donation amounts, to enhance the effectiveness of our fundraising efforts.

Lifetime value analysis

Employ Copilot to calculate the lifetime value of donors, identifying the most valuable supporters and determining appropriate ask levels for each segment.

Microsoft 365 Copilot in Excel

Calculate the lifetime value of our donors from the dataset to inform strategic donation request levels and maximize overall fundraising potential.

Fundraising | Data-led insights into crafting donor experiences

Potential benefits

| Enhanced donor retention | Increased donation rates | Personalized and satisfying donor experiences |

Opportunities for donor appreciation

Identify opportunities for demonstrating donor appreciation by analyzing contribution levels and engagement. Personalized recognition can enhance donor relationships and loyalty.

Microsoft 365 Copilot in Excel

Analyze donation data to identify appropriate tiers and **suggest personalized recognition** tiers for each level, such as bronze, silver, gold, and platinum donors.

Analyze engagement data

Leverage Copilot to dissect and compare donor engagement data, identifying the most impactful experiences and touchpoints that correlate with higher donation retention and frequency.

Microsoft 365 Copilot in Excel

Analyze donor engagement metrics to identify key experiences and interactions that significantly boost donation frequency and donor retention.

Personalization

If data shows that personalized experiences lead to higher donations, Copilot can help craft further individualized experiences that acknowledge each donor's previous contributions, interests, and the impact of their support.

Microsoft 365 Copilot

Suggest gift or special event ideas based on an Excel file,/ [Donor Information], which details donors' past interactions with the organization and demographic information.

A day in the life of the Head of Strategy

8:00 AM

John uses Copilot to obtain market-research insights for donor behavior within the sector by segment, based on reports received.

> **Summarize latest three reports** with a focus on donor behavior by segment. Highlight key paragraphs or figures.

8:30 AM

John uses Copilot to analyze donor datasets and determine an optimum value to request from a donation.

> **Create a scatter plot** of donation amounts against donor age.

> Any available graph can be created if the data exists in the Excel spreadsheet.

10:00 AM

Copilot accelerates catching up on emails for John by summarizing email threads and preparing draft responses and updates to donors.

> **Generate a brief thank-you email template for donors** that can be personalized with their name, donation amount, and preferred cause. The tone should be warm and appreciative.
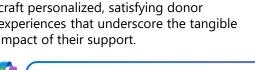
11:00 AM

John meets with his team to share insights and uses Copilot to help brainstorm how to craft personalized, satisfying donor experiences that underscore the tangible impact of their support.

> **Identify and outline action steps to implement personalized engagement tactics** that enhance donor satisfaction and visibly demonstrate the impact of their contributions.

2:00 PM

John is interested in establishing international donor links. He uses Copilot to assist with research and investigate suitable partners.

> **Identify potential partnerships and effective network opportunities** aligning with the values outlined in "Our Values" document.

4:00 PM

Having found a suitable international partnership opportunity, John uses Copilot to update a proposition pitch.

> **Add additional slide** based on the new potential partnership details outlined below...

John is Head of Strategy

Data Management

Using Microsoft 365 Copilot in data management

Goals and challenges

Goals: Efficiently capture, securely store, and effectively analyze data to enhance decision-making, demonstrate accountability to stakeholders, support fundraising efforts, and ultimately further the organization's mission and impact.

Challenges: Limited resources including budget, time, and staff; data security concerns; and the complexity of integrating data sources to form a cohesive and actionable understanding of operations and impact.

Copilot can assist with ...

- Data collection: Quality assurance
- Data reporting: Report creation
- Database management: Security and governance
- Data analysis: Insight-driven decision-making
- Data collection: Summarize and share results
- Data collection: Identifying co-financing opportunities
- Data analysis: Facilitate data interaction and literacy for non-specialists

Data Management roles

- Data Administrator
- IT Lead
- Business Analyst
- Director of Operations
- Data Architect
- Security Specialist

Microsoft Copilot use cases and potential benefits

Use case	Benefit
Quality assurance	Developing e-forms to standardize inputs and auditing data for quality, including outlier and range anomaly detection.
Report creation	Enhance report generation with custom templates to cut manual work, boost efficiency, and speed up reporting.
Security and governance	Advise on data security best practices and aid in developing governance frameworks for data accuracy, privacy, and compliance.
Insight-driven decision-making	Streamlining data analysis, crafting structured narratives, and visualization recommendations are key for insight-driven decisions.
Summarize and share results	Evaluating campaign success, highlighting achievements, and detailing donation impacts and resource allocation.
Identifying co-financing opportunities and matches	Identifying co-financing opportunities and matches is essential for leveraging additional funding sources and maximizing the impact of investment portfolios.
Facilitate data interaction and literacy for non-specialists	The importance of data interaction and data literacy through accessible query prompts is to empower all team members to make data-driven decisions, regardless of their technical background.

Improve data quality   Cost savings and avoidance   Keep data secure

Quality assurance

Data quality assurance is vital to ensure accuracy, reliability, and integrity of data, which forms the foundation for informed decision-making and operational excellence.

Benefits of using Copilot for quality assurance

Improve data quality

- Remove or explain any anomalies in the data leading to more accurate insights.
- Quickly validate collected data and check that it is within expected ranges.
- Create online forms with pre-defined input requirements to ensure appropriate data is collected and minimize volunteer time spent on repetitive tasks.

Roles

- Data Administrator
- Business Analyst
- IT Lead
- Data Architect

Microsoft AI solutions

- Microsoft 365 Copilot
- Microsoft Copilot

Report creation

Report creation is important as it translates complex data into actionable insights, facilitating strategic decisions and performance monitoring across the organization.

Benefits of using Copilot for report creation

Improve reporting

- Draft different versions of reports in different styles depending on the need.
- Include data analysis and visualization quickly and efficiently.
- Use across Word, Excel, and Power BI.

Roles

- Office Manager
- Business Analyst
- Director of Operations

Microsoft AI solutions

- Microsoft 365 Copilot
- Microsoft Copilot

Security and governance

Data security and governance are key to protecting sensitive information, complying with regulations, and maintaining trust with stakeholders by ensuring data is managed responsibly and ethically.

Benefits of using Copilot for security and governance

Improve compliance
- Increased compliance to required standards by raising awareness among staff and volunteers.

Improve decision-making
- Greater structure for data, enabling easier access, uniformity, and insights.
- Improved decision-making supported by reliable data governance.

Roles
- Data Administrator
- IT Lead
- Director of Operations
- Security Specialist

Microsoft AI solutions
- Microsoft 365 Copilot
- Microsoft Copilot

Insight-driven decision-making

Insight-driven decision-making is essential to empower the organization with data-backed clarity, driving strategic actions that enhance performance and services delivered.

Benefits of using Copilot for insight-driven decision-making

Increase speed and confidence

- Make informed decisions through quick, data-driven insights.
- Streamline decision-making with efficient data processing.
- Anticipate potential risks for proactive decision-making and to mitigate adverse outcomes.

Roles

- Data Administrator
- Business Analyst
- IT Lead

Microsoft AI solutions

- Microsoft 365 Copilot
- Microsoft Copilot

Summarize and share results

Summarizing and sharing results is critical to communicate valuable findings, foster data-driven culture, and support collaborative efforts towards achieving organizational goals.

Roles

- Director of Operations
- Business Analyst

Benefits of using Copilot for to summarize and share results

Improve data insights

- Processing and analyzing large volumes of data from the campaign for insights into KPIs, trends and patterns.
- Generation of tailored draft reports and summaries based on multiple information sources.

Improve decision-making

- Improved strategic decision-making for allocation of future resources.

Microsoft AI solutions

- Microsoft 365 Copilot
- Microsoft Copilot

Identifying co-financing opportunities and matches

Identifying portfolio co-financing opportunities facilitates strategic partnerships, leveraging shared interests to amplify funding impact and resource efficiency.

Roles

- Director of Operations
- Business Analyst

Benefits of using Copilot for identifying portfolio co-financing opportunities and matches

Strategic partnerships

- Connects with aligned organizations to pool resources for larger initiatives.
- Fosters collaboration, sharing expertise and networks for mutual benefit.

Amplified impact

- Multiplies resources and reach, achieving more significant project outcomes.
- Leverages combined strengths to tackle complex challenges more effectively.

Microsoft AI solutions

- Microsoft 365 Copilot
- Microsoft Copilot

Facilitate data interaction and literacy for non-specialists

Enables broader participation in data-driven discussions through accessible query prompts, enhancing organizational agility and collective intelligence.

Benefits of using Copilot for facilitating data interaction and literacy for non-specialists

Empowers staff
- Equips team members with tools to independently extract actionable insights.
- Fosters a sense of ownership and confidence in data handling.

Enhances efficiency
- Accelerates data retrieval processes, saving time for strategic tasks.
- Reduces bottlenecks by enabling direct access to information for decision-making.

Roles
- Director of Operations
- Business Analyst

Microsoft AI solutions
- Microsoft 365 Copilot
- Microsoft Copilot

Data management | Quality assurance

| Save time | Improve data quality | Avoid simple tasks |

Create new forms

Use Copilot to create electronic forms to standardize data inputs.

Microsoft 365 Copilot in Forms

Create a form capturing type of donation, date of donation, and amount of donation, sync the results to Excel.

Analyze data

Use Copilot to search the data for anomalies.

Microsoft 365 Copilot in Excel

Highlight the maximum and minimum in each revenue column.

> Outliers can be identified within any column of interest.

Validate data

Validate data in Excel using Copilot to ensure it is within expected ranges.

Microsoft 365 Copilot in Excel

Highlight any data in the zip code column that has less than seven characters.

> Data validity can be checked over a specified criteria within the dataset.

Data management | Report creation

Save time	Improve understanding	Reduce repetitive tasks

Create new Word report

Create a report in Word using Copilot based upon data in an Excel spreadsheet.

W **Microsoft 365 Copilot in Word**

Prepare a report outlining the total income vs. expenditure using the data from /[Revenue Data] Excel spreadsheet. Include a section on revenue targets.

Create visualizations

Create visualizations through prompts in Copilot to show stakeholders key information in a clear way.

X **Microsoft 365 Copilot in Excel**

Create a line graph showing overall donation figures across the year.

> Visualizations can be created depending on the user needs, within the scope of Excel.

Automated data synthesis

Copilot can aggregate and synthesize data from multiple sources to generate reports, saving time on manual compilation.

X **Microsoft 365 Copilot in Excel**

Consolidate financial data from the /[Grants and Donations] and /[Expenditures] files to generate an integrated financial health report for the quarter.

Data management | Security and governance

Research latest data governance

Use Copilot in Edge to compile the latest measures in data governance.

Microsoft 365 Copilot in Edge

Summarize any recent developments in the field of data governance for nonprofits.

> Copilot will search the internet and give information on the required topic.

Create presentation

Use Copilot to create a PowerPoint explaining to staff and volunteers the changes that have been implemented.

Microsoft 365 Copilot in PowerPoint

Create a presentation of the document /[Governance changes] summarizing the changes detailed. Make the document 10 slides and insert appropriate images or icons.

Summarize crucial meeting

Use Copilot to distill a critical Microsoft Teams meeting on security and compliance into a concise summary, extracting all action points and policy updates vital for the organization's safeguarding strategies.

Microsoft 365 Copilot in Microsoft Teams

Summarize the security and compliance meeting, include a summary, the action points, and any policy changes mentioned.

Data management | Insight-driven decision-making

Identify anomalies

Identify anomalies in the data using the Copilot function in Excel.

X **Microsoft 365 Copilot in Excel**

Identify any outliers in donations within the "Donor's Column."

Generate visualizations

Use Copilot to create visualizations in Power BI and receive suggestions for recommended visuals.

X **Microsoft 365 Copilot in Excel**

Create a visualization to show the frequency and value of donation for repeat donors.

Create narrative summary

Create a summary of a Power BI report using Copilot to gain further insight into the visuals shown.

W **Microsoft 365 Copilot in Word**

Summarize the data in this report, ensuring full analysis of all visuals for easy understanding.

Data management | Summarize and share results

| Save time | Consistent branding | Simplify communication |

Draft a report

Create a report based on the results found in three separate documents.

W Microsoft 365 Copilot in Word

Create a report based on the results in /[Document 1], /[Document 2], and /[Document 3].

> You can include key sections that you would like the report to cover based off these documents.

Generate slides

Use Copilot to create a slide deck with branding.

P Microsoft 365 Copilot in PowerPoint

Create a slide about the recent campaign /[Campaign for nonprofits] using /[Organization Template 1].

Draft emails

Draft emails containing the agreed upon KPIs for distribution.

O Microsoft 365 Copilot in Outlook

Draft an email detailing the KPIs discussed in this morning's meeting /[Meeting 1].

> Copilot can produce follow up emails based on a Copilot meeting summary that has been created.

Data management | Identifying portfolio co-financing opportunities and matches

Potential benefits

Partnership expansion	Improve financial sustainability	Leverage existing resources

Strategic partner identification

Copilot can analyze funding patterns and interests to match projects with like-minded organizations or foundations for collaborative financing opportunities.

Microsoft 365 Copilot

Scan for organizations with similar funding patterns and interests to identify strategic partners for co-financing opportunities; use the /[Funding Information] document for information.

> You can include key organizational information or documents to provide Copilot with context.

Funding gap analysis

Copilot can assess the nonprofit's portfolio to identify projects with funding shortfalls.

Microsoft 365 Copilot in Excel

Analyze our project portfolio, highlight funding shortfalls.

Grant alignment

Copilot can cross-reference grant requirements with project objectives to pinpoint precise co-financing matches, increasing the likelihood of successful funding partnerships.

Microsoft 365 Copilot

Match our project objectives with grant requirements identifying optimal co-financing opportunities for enhanced funding success. Use the /[Project Objectives] document for information.

Data management | Facilitate data interaction and literacy for non-specialists

Potential benefits

| Democratize data access | Empower staff | Foster a data-driven culture |

Intuitive data queries

Copilot can translate natural language questions into data queries, democratizing data access and allowing non-specialists to analyze data without technical expertise.

Microsoft 365 Copilot in Excel

Interpret this natural language request into a data extraction command: "Show me the trend in volunteer hours over the past year."

Automated insight generation

Copilot can automatically generate reports and visualizations from data queries, making data interpretation accessible to all staff members.

Microsoft 365 Copilot in Excel

Produce a chart showing the month-over-month growth in new memberships using the latest data.

Personalized data education

Copilot can summarize technical guidance and offer tailored tutorials on data literacy, helping non-specialists become more confident and competent in data interaction.

Microsoft 365 Copilot

Summarize this guidance webpage on how to interpret a regression analysis graph on volunteer engagement for our program coordinators.

A day in the life of a Head of Insight and Analytics

8:00 AM

Daily meetings are a common part of Will's day. It is important to keep summary notes of key points.

> **Summarize** key points from meetings throughout today in bullet point form.

> If the meeting agenda is known, more specific summary requirements can be added.

10:00 AM

Will has reporting tasks based off data which has been either sent to him or from previous research. The data is to be analyzed for various requirements.

> **Check this dataset for any anomalies and irregular data. Analyze it and generate reports** to show the largest donations this year, by company.

> Microsoft 365 Copilot in Excel can analyze and report on data, if the fields requested exist in the Excel file.

11:00 AM

Will has received an Excel file with information on potential funders whose values are in line with his organization's. Copilot helps him prepare to share this with other teams by creating an engaging Word document from the Excel data.

> **Create a document** from /[Donor information] Excel file that outlines potential donors along with their key interests and contact information. Make the tone positive and motivational.

1:30 PM

Copilot assists Will by creating a PowerPoint presentation of the donor data, which can be used to show stakeholders which new donors to pursue.

> **Create a draft PowerPoint** based off the document /[Tailored donor data]. Include images that will engage the audience.

3:00 PM

Reports are generated on a regular basis, such as monthly. Will needs to export data from the system, supplement it, and Copilot can create an accompanying narrative along with it.

> **Analyze the information in** /[Monthly Report], **create a narrative of the data** in the form of a timeline based off how the data has changed over the past month. Give reasons for the peaks and troughs of the data.

4:00 PM

Will has various projects which require funding; some projects many need to be co-financed by multiple awards, where the initial step requires matching potential donors to the project.

> **Research potential donors,** based on similar interests, create a selection of multiple donor pairings who have the potential to co-finance a project worth $70,000.

Will is the Head of Insight and Analytics
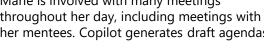
A day in the life of a Data Strategist

9:00 AM

Marie is involved with many meetings throughout her day, including meetings with her mentees. Copilot generates draft agendas.
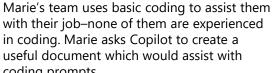
Generate a draft agenda for a 30-minute performance review meeting. Include points that a mentor of a Junior Analyst would review their performance on, in bullet point form.

10:00 AM

Marie's team uses basic coding to assist them with their job—none of them are experienced in coding. Marie asks Copilot to create a useful document which would assist with coding prompts.

Generate a Word document with bullet points listing prompt ideas that will work in Copilot, to aid in basic coding for improved accuracy and efficiency.

11:00 AM

Copilot can develop reports that communicate insights to stakeholders for informed decision-making. Marie can then analyze these insights and take the required next steps.

Generate reports to show insights based off these three datasets from the /[Data Strategy] file.

1:30 PM

Copilot assists Marie in comparing previous programs by analyzing outcome data.

Analyze data from /[Previous Program Outcomes] to assess outcomes and compare areas of impact.

3:00 PM

Microsoft 365 Copilot in Microsoft Teams gives Marie the ability to summarize and search message chains from colleagues across multiple teams, using insights to guide conversations on new community-focused projects.

Summarize the messages in this chat, prioritize discussion on new community projects and cross-departmental collaboration.

4:30 PM

Marie has been sent a large dataset on Excel, named /[Raw Data]. Copilot offers data cleaning recommendations, ensuring accuracy by eliminating blanks, duplicates, and inconsistencies.

Provide data cleaning steps for the /[Raw Data] Excel file to remove blanks, duplicates, and fix inconsistencies.

Marie is a Data Strategist

Operations

Using Copilot in operations

Goals and challenges

Goals: Recruiting and retaining dedicated staff and volunteers, fostering a positive work environment, ensuring compliance, and providing training and development opportunities.

Challenges: Limited resources, high turnover rates, recruiting and retaining passionate volunteers and staff, and aligning individual goals with the overall goals of the organization.

Copilot can assist with ...

- HR: Job posting and screening
- Admin support: Logistics management
- HR: Performance and professional development
- Admin support: Prioritize emails based off criteria
- HR: Tailored job descriptions and questions
- Admin support: Assist neurodivergent team members
- Admin support: Content, layout options, and redaction for reports

Operations roles

Chief People Officer

Director of HR

Office Manager

Director of Operations

HR Manager

Facilities Manager

Microsoft 365 Copilot use cases and potential benefits

	Job posting and screening	Copilot aids in crafting and validating job postings to reduce attrition.
	Logistics management	Logistics management in a nonprofit involves planning, efficient delivery of goods and/or services, and reducing wastage.
	Performance and professional development	Employee performance monitoring is key to optimizing nonprofit impact and growth.
	Prioritize emails based off criteria	Prioritizing emails based on specific criteria is important to streamline communication, ensure timely responses, and manage workload effectively.
	Tailored job descriptions and questions	Tailoring job descriptions and incorporating value-based interview questions are crucial for attracting the right talent and ensuring cultural fit.
	Assist neurodivergent team members	Supporting neurodivergent team members in their work is important to foster an inclusive workplace and enable everyone to reach their full potential.
	Content, layout options, and redaction for reports	Providing content and layout options for reports is important to ensure clear communication and effective dissemination of information. Redaction options help to protect confidentiality.

Employee performance   Less waste   Reduce repetitive tasks

Job posting and screening

Job posting and screening ensures the right talent is identified and hired, directly impacting the organization's efficiency and success.

Benefits of using Copilot for job posting and screening

Engagement and focus

- Reduce time taking notes during interviews, enabling greater focus on candidates.
- Dispatch email replies quicker to foster a better sense of engagement with applicants.

Efficient verification

- Verify roles and responsibilities of the position efficiently to increase number of appropriate candidates.

Roles

- HR Manager
- Office Manager
- Director of Operations

Microsoft AI solutions

- Microsoft 365 Copilot
- Microsoft Copilot

Logistics management

Logistics management is crucial for optimizing the flow of goods and services, reducing costs, and ensuring customer satisfaction.

Benefits of using Copilot for logistics management

Optimized resource allocation

- Ensures efficient use of materials and space for maximum cost savings.
- Aligns supply with demand, reducing waste, and enhancing service delivery.

Insightful coordination

- Quick insight into common logistical considerations from nonprofit perspective.
- Keep track of weekly meetings easily.

Roles

- Director of HR
- HR Manager
- Office Manager
- Facilities Manager

Microsoft AI solutions

- Microsoft 365 Copilot
- Microsoft Copilot

Performance and professional development

Performance and professional development enhances skills, boosts productivity, and supports career growth, benefiting individuals and the organization.

Benefits of using Copilot for performance and professional development

Analytical precision
- Efficient feedback analysis from multiple sources.
- Improved accuracy with large amounts of data.

Growth and objectivity
- Objectivity and removal of bias.
- Identify areas for employee development and growth.

Roles
- Director of HR
- Director of Operations
- Office Manager

Microsoft AI solutions
- Microsoft 365 Copilot
- Microsoft Copilot

Prioritize emails based off criteria

Prioritizing emails based on predetermined criteria streamlines communication, ensuring timely responses to critical messages and efficient resource allocation.

Benefits of using Copilot for prioritizing emails based off criteria

Streamlines communication
- Filters critical emails for immediate attention, ensuring prompt replies.
- Organizes inbox to focus on high-priority correspondence, reducing clutter.

Roles

- Director of HR
- Director of Operations
- Office Manager

Microsoft AI solutions

- Microsoft 365 Copilot
- Microsoft Copilot

Tailored job descriptions and questions

Enhancing nonprofit recruitment with tailored job descriptions and value-based questions attracts candidates aligned with organizational values, fostering a committed and mission-driven workforce.

Roles

- Director of HR
- Director of Operations
- Office Manager

Benefits of using Copilot for tailoring job descriptions and questions

Attracts talent

- Draws skilled individuals who resonate with the nonprofit's mission and values.
- Increases the quality of applicants with precisely crafted job postings.

Cultural fit

- Ensures new hires share organizational ethos fostering a harmonious workplace.
- Reduces turnover by aligning candidate expectations with the nonprofit's culture.

Microsoft AI solutions
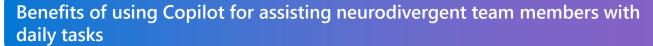
- Microsoft 365 Copilot
- Microsoft Copilot

Assist neurodivergent team members

Assisting neurodivergent team members with daily tasks promotes inclusivity and leverages diverse perspectives for a more innovative and adaptable organization.

Benefits of using Copilot for assisting neurodivergent team members with daily tasks

Promotes inclusivity
- Creates a supportive environment for diverse cognitive abilities and work styles.
- Encourages a culture of acceptance, valuing everyone's unique contributions.

Enhances productivity
- Enables neurodivergent individuals to excel in their roles, boosting overall output.

Roles
- Director of HR
- Director of Operations
- Office Manager

Microsoft AI solutions
- Microsoft 365 Copilot
- Microsoft Copilot

Content, layout options, and redaction for reports

Providing content and layout options for reports ensures clear, engaging communication that effectively conveys the nonprofit's message and mission.

Benefits of using Copilot for content, layout options, and redaction for reports

Enhanced clarity
- Clearer messaging of nonprofit communications.
- Reduces ambiguity, ensuring messages are understood as intended.

Protect confidentiality
- Reduces repetitive tasks by offering automatic redaction of identifying information.

Creative variety
- Offers multiple presentation styles to suit different content types.
- Engages audiences with visually appealing and diverse formats.

Roles
- Director of HR
- Director of Operations
- Office Manager

Microsoft AI solutions
- Microsoft 365 Copilot
- Microsoft Copilot

Operations | Job posting and screening

Save time	Improve communication efficiency	Avoid simple tasks

Creating a job advertisement

Use Copilot in Edge to compile a list of standard job roles and responsibilities to validate what is being sent out in the advertisement.

Microsoft 365 Copilot in Edge

Create a list of roles and responsibilities for an IT manager.

Draft emails

Use Copilot in Outlook to draft email responses to any questions posed by candidates.

Microsoft 365 Copilot in Outlook

Draft an email in response to this question about the salary range.

> Copilot can draft emails based on a wide criteria of input.

Transcribe and summarize

Use Copilot to create a transcript of an interview and summarize a candidate's answers to key questions.

Microsoft 365 Copilot in Microsoft Teams

Summarize this meeting, splitting it into questions and answers.

> Copilot can summarize Microsoft Teams meetings, and the user can input key criteria of focus for the summary to contain.

Operations | Logistics management

| Improve efficiency | Improve quality of emails | Improve response to issues |

Raising awareness

Use Copilot to draft an email detailing an upcoming internal event that personnel are requested to attend.

Microsoft 365 Copilot in Outlook

Draft an email inviting employees to a company social evening on Friday, May 30 at 6:00 PM.

> Prompt Copilot with more information for a more comprehensive draft invite.

Screen previous reports

Screen a selection of previous reports using Copilot to identify where issues have happened previously.

Micorosft 365 Copilot

Screen this report for any discussion of issues in the supply route to New York.

Provide an overview

Use Copilot to provide overviews of weekly meetings, picking out any action points that are still open.

Microsoft 365 Copilot in Microsoft Teams

Create an overview of the summary from [Meeting 1] and list any open action points now that we have received the required documents from the legal team.

Operations | Performance and professional development

| Improve response to issues | Enhanced feedback actionability | Explore creative solutions |

Analyze manager feedback

Copilot can collate and analyze feedback for an employee from multiple managers or sources.

[W] **Microsoft 365 Copilot in Word**

Create a document with the summarized feedback based upon documents /[Feedback 1] and /[Feedback 2].

Analyze employee feedback

Use Copilot to analyze employee feedback and search for ways that issues raised can be addressed.

Microsoft 365 Copilot

Summarize the information in /[Employee Feedback] document and **suggest potential solutions** to the issues raised in it.

> Copilot will generate ideas based on the issues raised within specific files, if prompted to do so.

Create a development plan

Use Copilot to create a development plan with suggestions provided by Copilot.

[W] **Microsoft 365 Copilot in Word**

Create a development plan for an employee in the fundraising sector of the organization, focusing on developing customer relations skills.

> If the development plan created with this prompt is too basic, the user can provide additional documents for Copilot to generate the plan from.

Operations | Intelligent communications management

Streamline inbox management | Ensure fast response to critical emails | Improve time management

Urgent issue response

When you filter emails for topics indicating urgency or high importance, Copilot can assist by drafting responses to those emails.

Microsoft 365 Copilot in Outlook

Create a first draft for this email which has been marked as urgent.

Internal communication

Copilot can draft internal updates to all staff detailing developments in key areas.

Microsoft 365 Copilot in Outlook

Generate a draft email to all staff informing them about a systems update on July 7th where they will not have access to email or Copilot.

Email chain summarization

Copilot can analyze lengthy email threads to extract and summarize key points, reducing redundancy and bringing unique, actionable information to the forefront for efficient review.

Microsoft 365 Copilot in Outlook

Condense this email chain into a brief summary, highlighting new and relevant points for efficient reading.

Operations | Tailored job descriptions and questions

Reduce cost per hire	Attract mission-aligned talent	Inclusive hiring practices	Streamline hiring

Targeted talent attraction

Copilot can craft job descriptions that resonate with the values and skills of ideal candidates, increasing the likelihood of attracting individuals aligned with the nonprofit's mission.

Microsoft 365 Copilot

Create a compelling job listing for a Fundraising Specialist that reflects our nonprofit's commitment to social justice and community development.

Diversity and inclusion

Use Copilot to help ensure job descriptions and interview questions are unbiased and inclusive, promoting a diverse and equitable recruitment process.

Microsoft 365 Copilot in Word

Formulate interview questions that assess candidate competency while ensuring inclusivity and respect for all backgrounds.

Efficient screening

By generating value-based application and interview questions, Copilot can assist in identifying candidates who have the required skills and share the organization's core values, streamlining selection.

Microsoft 365 Copilot

Develop a set of interview questions that will help determine a candidate's alignment with our organizational values of integrity and compassion.

Operations | Assist neurodivergent team members

| Improved communication clarity | Increased efficiency | Improved time management |

Communication support

Copilot can offer tools that simplify and clarify communication for neurodivergent team members, ensuring they can fully participate in workplace interactions.

Microsoft 365 Copilot

Review this text to check if it sounds formal enough for a work email to my manager.

> Copilot can proofread communications for different channels (e.g., Microsoft Teams).

Task management

Use Copilot to create personalized task management systems that cater to the unique working styles of neurodivergent individuals, enhancing productivity and job satisfaction.

Microsoft 365 Copilot

Create a daily checklist for a team member with ADHD that incorporates frequent breaks and varied tasks to maintain focus.

Note-taking

Copilot can consolidate and streamline note-taking by providing clear, organized meeting summaries, ensuring all critical information and individual action items are captured and easily accessible.

Microsoft 365 Copilot in Microsoft Teams

Compile a concise outline of the project kick-off meeting, ensuring all deliverables and responsible parties are clearly identified. Highlight my action points.

Operations | Content, layout options, and redaction for reports

| Efficient production | Visual appeal | Branding consistency |

Enhanced storytelling

Copilot can help craft compelling narratives for reports that effectively convey the impact of the nonprofit's work engaging readers and inspiring action. Copilot can save time by redacting identifying information.

Microsoft 365 Copilot in Word

Draft an engaging introduction for a case report that captures the transformational journey of a program beneficiary, ensuring identifying information is redacted.

> Copilot can draft a report based on a provided case document.

Consistent branding

Copilot can ensure that content and design elements align with the nonprofit's branding guidelines, maintaining a consistent and professional image across all publications.

Microsoft 365 Copilot in PowerPoint

Create presentation from file, using /[Organization's branded slide] templates.

Creative inspiration

Copilot can suggest visually appealing layouts and graphic elements that enhance the readability and attractiveness of reports, making them more likely to be read and shared.
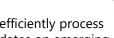
Microsoft 365 Copilot in PowerPoint

After presentation has been created, **click on the "Try new design" button.**

A day in the life of an Operations Manager (legal)

7:00 AM

Amanda uses Copilot to efficiently process and respond to email updates on emerging humanitarian issues.

Summarize key points from emails in this chain regarding new developments on refugee legislation and draft prioritized responses.

8:30 AM

Amanda uses Copilot to quickly draft an urgent policy update in response to recent developments in legislation on an area of humanitarian concern.

Draft a policy update reflecting the implications of the latest refugee legislation.

9:00 AM

Amanda convenes a meeting with the legal team to align humanitarian response with new refugee law amidst ongoing projects.

Prepare an agenda for discussing the integration of the new refugee law with our nonprofit's current humanitarian efforts.

11:00 AM

Amanda leverages Copilot to quickly review the relevant organizational policy to provide swift legal guidance in response to a team member's inquiry.

Find and collate sections in this /[Policy] document on refugee legislation that provide guidance on legal protocols for refugee aid.

2:00 PM

Amanda employs Copilot for expedited review of documents before presenting at an upcoming board meeting.

Extract and summarize crucial legal updates from recent organization reports for the upcoming board meeting discussion.

4:00 PM

Amanda utilizes Copilot for task management to optimize workflow and meet legal department deadlines. It supports planning by generating task durations and effort levels.

Analyze the /[Refugee Outreach Project] document and suggest legal team task durations and efforts for planning.

Amanda leads a legal team within the Operations department

A day in the life of a Safeguarding Manager

7:00 AM

Mayte uses Copilot to leverage internal organizational knowledge with external safeguarding resources to begin identifying risks for a new program.

> **Review** our /[Safeguarding policies] document alongside NSPCC guidelines, to **identify potential risks** for a new community engagement program.

8:30 AM

Mayte meets her team to review urgent safeguarding developments. They use Copilot to generate accurate minutes and clear action points for immediate attention.

> **Compile detailed minutes and list actionable steps** from today's urgent safeguarding meeting for immediate implementation.

9:00 AM

Mayte crafts compelling, multi-channel communications to distribute information on safeguarding policies with Copilot's assistance.

> **Create engaging content for email and other key internal platforms** to effectively share safeguarding policy updates.

11:00 AM

Mayte uses Copilot to review, synthesize, and summarize safeguarding case documents and redact identifying information to maintain confidentiality.

> **Analyze and summarize** key similarities and differences from /[Safeguarding] document on cases during and outside of COVID-19 lockdowns. **Redact identifying information** in final summary.

2:00 PM

Mayte uses Copilot to generate content ideas for live reports that provide learning opportunities for the safeguarding team.

> **Identify and suggest topics for reports** that offer valuable insights for the safeguarding team's continuous learning based on a selection of current case documents.

4:00 PM

Mayte crafts an engaging staff newsletter celebrating recent milestones with Copilot's content assistance.

> **Create an uplifting staff newsletter** featuring our latest achievements and positive developments in the area of safeguarding.

Mayte leads a safeguarding team

A day in the life of an Operations Manager

7:00 AM

Tom is a new employee. He uses Copilot to analyze the previous year's annual report, extracting key metrics, milestones, and critical focus areas to provide some detailed insight into future priorities.

> **Review last year's** /[Annual Report] document and extract key metrics, milestones, and areas of critical focus into a single page overview to guide a new employee.

8:30 AM

Tom identifies as neurodivergent and can find managing his calendar challenging. He uses Copilot to assist with task prioritization.

> **Review minutes from this morning's meeting** and give me a set of tasks prioritized by urgency.

9:00 AM

Tom knows that some employees perform multiple functions in the organization. He uses Copilot to advise on whom he should contact with a query.

> **Can you use this** /[Company departments] document and **inform me who I should contact to find out more** information about mileage payments?

11:00 AM

Tom has drafted a new document and wants to check if it is consistent with the organization's values before sharing with his colleagues.

> **Check** /[Operations report] **for adherence to organizational values and objectives** outlined in /[Our Values] document.

2:00 PM

Tom's supervisor is on location at a project site and cannot advise ahead of an urgent client meeting. Tom uses Copilot to stay informed going into the meeting.

> **Review previous supervisor meeting minutes and summarize priorities** for a client meeting.

4:00 PM

Tom has questions about employee support but there is a large quantity of induction information to get through. He uses Copilot to review the documentation and find out what is available before speaking to a colleague.

> **Review this** /[induction pack] document. **Generate a summary of what employee support is available** and who I should speak to about a health issue.

Tom leads an operations team

A day in the life of a Head of Partnerships and Impact

7:00 AM

Juliet starts her morning by checking her emails. Copilot assists by summarizing long email chains.

> Summarize this email thread.

8:30 AM

Copilot helps Juliet to write clear, engaging email invitations for upcoming workshop activities, ensuring all details are included for attendees.

> Draft compelling email invitations for workshops on [Partnership Development], complete with all necessary information for participant readiness.

9:00 AM

When planning her workshops, audience interaction and engagement are key for Juliet. Copilot assists by including opportunities to keep the audience interested and engaged, while delivering an educational experience.

> Create a PowerPoint presentation based on [Partnerships Workshop] which incorporates regular breakout slides for audience activities to maintain interest and engagement during workshops.

11:00 AM

Juliet leads a lot of meetings. She creates briefing packets and concise summaries for these meetings with Copilot's help to ensure everyone is well-prepared and informed.

> Generate briefing packets and concise summaries for meetings today to help participants come prepared and stay informed. The meeting agendas are in the document /[Meeting agenda – 05/29].

2:00 PM

Juliet makes use of Copilot's feature to quickly draft strategic planning documents and explore different styles, making the document creation process more efficient and varied.
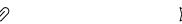
> Create multiple draft documents to promote our organization's upcoming event plans, suggesting various styles. Event information is in the document /[Upcoming events 2024].

4:00 PM

Juliet employs Copilot to compile meeting minutes and track action items, easing the administrative load on the members of Juliet's team who have many responsibilities.

> Document detailed meeting minutes and assign action items, focusing on partnership and impact goals.

Juliet is the Head of Partnerships and Impact

A day in the life of an HR Manager

8:00 AM

When planning resources for an upcoming engagement event, Jane uses Copilot to predict no-shows and adjust volunteer schedules for seamless operations.

Analyze volunteer data from /[Event Resource Requirements 2022–23] and **forecast the number of volunteers** needed for next month's community event with 200 expected attendees.

8:30 AM

Jane crafts job descriptions for nonprofit roles with Copilot's help to attract the right candidates for the team.

Create a comprehensive job description for a nonprofit position, highlighting essential skills and organizational values to attract suitable candidates.

Use specific job titles for more tailored job descriptions.

11:00 AM

Jane uses Copilot to develop interview questions that assess candidates' alignment with the nonprofit's values and mission.

Formulate recruitment interview questions focused on aligning with the nonprofit's mission and values for candidate assessment.

11:00 AM

Jane evaluates resumes against essential job criteria, with Copilot speeding up repetitive tasks such as searching for key words or areas of interest.

Search this resume to check if the candidate has an undergraduate degree in a relevant area.

2:00 PM

Jane gathers impartial data insights on the nonprofit's logistics, using Copilot for accurate analysis and reporting.

Analyze /[logistics data] to provide insights and create clear reports for strategic decision-making.

4:00 PM

Jane utilizes Copilot to analyze staff performance data and highlight improvement areas so she can provide data-informed practical suggestions for staff feedback and potential future training areas.

Analyze performance data from the document /[Staff Review] document to rank most common potential improvement areas.

Jane works within the HR department as an HR Manager.

Finance

Using Copilot in finance

Goals and challenges

Goals: The finance division in a nonprofit organization ensures responsible fund management, resource allocation, transparency, and compliance. Their role supports the organization's mission and financial integrity.

Challenges: Limited funding sources, complex reporting requirements, financial sustainability, handling of restricted revenue.

Copilot can assist with ...

- Financial management: Grantee evaluation
- Financial management: Accounts Payable/Accounts Receivable
- Financial analysis and reporting: Financial projections
- Financial analysis and reporting: Audit compliance

Operations roles

Chief Financial Officer

Finance Manager

Accountant

Procurement Manager

Financial Planning and Analysis Manager

Microsoft 365 Copilot use cases and potential benefits

Grantee evaluation
Grantee financial health is assessed by adapting Key Performance Indicators (KPIs) and building partnerships for effective communication.

Accounts Payable/Accounts Receivable
A nonprofit organization optimizes Accounts Payable processes to manage timely payments to suppliers, ensuring liquidity and strong vendor relationships. Simultaneously, efficient Accounts Receivable management ensures steady cash flow by collecting payments owed to the organization.

Financial projections
Financial projections within a large nonprofit organization allow the setting of SMART goals, strategic planning, budget allocation, and informed decision-making. These projections guide fundraising efforts and ensure financial sustainability. Accurate financial projections empower nonprofits to navigate their financial journey effectively.

Audit compliance
Audit compliance in a nonprofit organization ensures financial transparency, accountability, and adherence to regulatory standards. It validates financial practices and builds donor trust.

Ensure strong relationships   Financial planning   Validated practices

Grantee evaluation

Grantee evaluation is critical to ensure funds are utilized effectively, align with the mission, and create measurable impact, thereby maintaining accountability and donor trust.

Benefits of using Copilot for grantee evaluation

Grantee evaluation summaries

- Provide complete summary of relevant grantee details in Outlook to expediate collections process, e.g., bank statements, invoices.
- Create grantee performance dashboards using Power BI.

Roles

- Chief Financial Officer
- Finance Manager
- Accountant

Microsoft AI solutions

- Microsoft 365 Copilot
- Microsoft Copilot

Accounts Payable/Accounts Receivable

Accounts Payable/Accounts Receivable management is essential to maintaining a healthy cash flow, ensure fiscal responsibility, and sustain the organization's financial stability for ongoing operations and mission fulfilment.

Benefits of using Copilot for Accounts Payable/Accounts Receivable

Manage Accounts Payable/Accounts Receivable

- Automate data reconciliation—generate reconciliation reports and summaries in Excel.
- Manage accounts receivable communications—summarize emails, construct draft emails, and use coaching tool.
- Effective Accounts Payable/Accounts Receivable documents—using Word, create Accounts Payable/Accounts Receivable documentation (e.g., invoices).

Roles

- Chief Financial Officer
- Finance Manager
- Accountant

Microsoft AI solutions

- Microsoft 365 Copilot
- Microsoft Copilot

Financial projections

Financial projections are key for a nonprofit's finance department to anticipate future funding needs, enable sustainable growth, and guide strategic planning for long-term mission success.

Benefits of using Copilot for financial projections

Enhanced reporting

- Time saved through financial reporting automation using Excel.
- Predictive analysis for fundraising efforts using Excel offers future insights.
- Market trend analysis with real-time dashboards on Power BI.

Roles

- Chief Financial Officer
- Finance Manager
- Accountant

Microsoft AI solutions

- Microsoft 365 Copilot
- Microsoft Copilot

Audit compliance

Audit compliance is essential for a nonprofit's finance department to demonstrate financial integrity, adhere to legal standards, and sustain the confidence of donors, stakeholders, and regulatory bodies.

Benefits of using Copilot for audit compliance

Manage audit compliance
- Time saved through automated variance analysis.
- Support compliance with industry-specific document automation.
- Streamlining and accelerating researching audit compliance.

Roles

- Chief Financial Officer
- Finance Manager
- Accountant

Microsoft AI solutions

- Microsoft 365 Copilot
- Microsoft Copilot

Finance | Grantee evaluation

| Save time | Improve data visualization | Avoid simple tasks |

Grantee communication summaries

Provide summaries of relevant grantee communications in Outlook to monitor when they have supplied information e.g., emails mentioning bank statements, invoices.

Microsoft 365 Copilot in Outlook

Summarize this email chain of communications with this grantee.

Grantee performance dashboards

Efficiently create grantee performance dashboards using Copilot in Power BI.

Microsoft 365 Copilot in Power BI

Analyze /[Grantee performance] document and create a dashboard where grantees can be compared to each other by region.

Data-driven grantee assessment

Collate supplied information and create a report on a Grantee, based upon an existing template.

Microsoft 365 Copilot in Word

Create a report using the grantee report template using information in documents /[Grantee Information 1] and /[Grantee Information 2].

Finance | Accounts Payable/Accounts Receivable

| Save time | Facilitate communication | Avoid simple tasks |

Automate data reconciliation

Microsoft 365 Copilot for Finance within Excel generates reconciliation reports and summaries across systems for anomalies, risks, and unmatched data.

Microsoft 365 Copilot in Excel

Generate reconciliation report detailing matched and unmatched transactions, and anomalies.

Data analysis and simple reports can be produced based on the data input.

Manage accounts receivable communications

Summarize customer information from source ERP, summarize inbound emails, assist in constructing emails, use coaching feature for suggestions.

Microsoft 365 Copilot in Outlook

Draft an email to [insert name] to explain that there is a discrepancy in the accounts receivable.

For further development on the discrepancy, give basic details and Copilot can elaborate on it.

Effective Accounts Payable/Accounts Receivable documents

Using Word, create Accounts Payable/Accounts Receivable documentation (e.g., invoices) with suggested content improvements, formatting options, and even generating text.

Microsoft 365 Copilot in Word

Create an invoice reminder for overdue payments, based on the format from /[Invoice] document.

Finance | Financial projections

| Save time | Improve understanding | Receive insights on potential future developments |

Financial reporting automation

Automate financial reporting in Excel.

X **Microsoft 365 Copilot in Excel**

Generate a monthly financial report, including profit and loss (P&L) statements, balance sheets, and cash flow statements.

Predictive analysis

Analyze past financials in Excel to understand patterns and provide forecasting.

X **Microsoft 365 Copilot in Excel**

Analyze /[Past donation behavior] spreadsheet within this Excel document, produce a report forecasting future donations.

> Forecasting based off previous reports allows time for future appeals to be created.

Market trend analysis

Create real-time dashboards in Power BI to analyze market trends and understand the behavior of other nonprofit organizations.

Microsoft 365 Copilot in Power BI

Develop real-time dashboards for market analysis.

> Dashboards can be updated in real time, if the data input is updated to reflect this.

Finance | Audit compliance

| Save time | Support best practice and regulation compliance | Avoid simple tasks |

Automated variance analysis

Analyze financial data in Excel for any discrepancies.

Microsoft 365 Copilot in Excel

Analyze the financial data for the past year and identify any irregularities or anomalies.

Industry-specific automation

Review and draft legal or financial documents that adhere to organizational policy, suggesting clauses and reviewing compliance issues.

Microsoft 365 Copilot in Word

Draft a grant agreement document, ensuring compliance with legal requirements detailed in the /[Legal Considerations] document.

Research audit compliance

Chat with Copilot to make requests and ask questions to gather up-to-date information in areas such as audit compliance.

Microsoft 365 Copilot

Provide a list of the top ten best practices when considering audit compliance within a nonprofit organization.

> Prompt Microsoft 365 Copilot to browse the internet and produce a document with specific requirements.

A day in the life of a Financial Analyst

8:00 AM

Hillary uses Copilot to efficiently manage donor funds, prepare transparent reports, and forecast cash flow, optimizing her nonprofit's financial health.

> **Generate a report** detailing donor fund allocations, upcoming grant deadlines, and a cash flow forecast for the next quarter.

9:30 AM

Hillary uses Copilot to prepare for finance team meetings, compiling key financial data and insights to drive informed decision-making.

> **Assemble the latest financial summaries, budget forecasts, and compliance updates** for an effective finance team meeting agenda, using these Word documents—/[Finance report], /[Finance forecast], and /[Compliance 2024].

10:00 AM

Through Copilot, Hillary stays ahead of compliance, tracking regulatory changes and updating financial practices to meet nonprofit standards.

> **Update me on any new financial compliance requirements** from the past 12 months and outline suggested action points to integrate these into our current practices to maintain nonprofit standards.

11:00 AM

Hillary employs Copilot to craft a compelling finance presentation, highlighting the nonprofit's fiscal stewardship and programmatic impact on the community.

> **Create a presentation from** /[Finance Report 2023-2024].
>
> **Add a slide** to show the measurable impact of our programs on beneficiaries.

2:00 PM

Hillary employs Copilot to streamline the nonprofit's audit preparation, concentrating on restricted fund compliance and accurate reporting of grant expenditures.

> **Create a comprehensive report** on restricted funds, grant allocations, and project finances to demonstrate accountability in the organization's annual audit.

4:00 PM

Hillary leverages Copilot to summarize high importance email queries which impact the nonprofit's financial operations and compliance and bring these to her team for discussion.

> **Summarize this email chain** of high-priority financial and compliance communication for immediate action.

Hillary is a Financial Analyst at Contoso

Detailed examples of Microsoft 365 Copilot prompts

Market research

Marketing

As someone in...

Marketing team.

I want to...

Understand key offerings within nonprofit markets, learn about the various options available, and gather financial information for the business case for a new humanitarian aid initiative in the wake of natural disaster.

Microsoft 365 Copilot in Edge

Prompt...

"Search for information on leading humanitarian aid initiatives operating in [insert disaster local], assess their market penetration and success rates, and provide a financial overview to inform our strategic planning and resource allocation."

I'll know this is successful when...
Market research is streamlined, and insights are easily and efficiently accessed.

The value Copilot provided me in completing this job (functional, emotional, social)

- Reduces time spent on information-gathering activities, synthesis, and overview production.
- Facilitates swifter communication of findings.

Generate ideas

Marketing

As someone in...	Marketing team.
I want to...	Generate ideas, using the AI language model to suggest some tagline ideas for a new marketing campaign to promote children's rights in humanitarian crises.
Microsoft 365 Copilot **Prompt...**	"Generate a selection of suggested taglines for our new campaign on children's rights in humanitarian crises. Give me some options appropriate for different age groups."

I'll know this is successful when...
Ideas are easily generated and tailored with the addition of further information.

The value Copilot provided me in completing this job (functional, emotional, social)

- Creativity is jump-started with the provision of multiple appropriate suggestions.
- Campaign progress is accelerated, and income generated more quickly.

Summarize interviews

Marketing

As someone in...

Marketing team.

I want to...

Transcribe data and summarize findings from market research interviews.

Find participant responses which provide feedback on the new campaign's design and aesthetics.

Microsoft 365 Copilot in Microsoft Teams

Prompt...

Turn on transcription in Microsoft 365 Copilot in Microsoft Teams.

"Summarize participant responses to each question."

"Search for participant responses including feedback on the new campaign's design and aesthetics."

I'll know this is successful when...

Accurate transcripts are quickly provided and can be summarized for ease of reading. Transcripts are also searchable for responses covering specific topics.

The value Copilot provided me in completing this job (functional, emotional, social)

- Reduces time spent on simple and repetitive transcription tasks and on manually summarizing findings or looking for specific information.

- Findings can be extracted and analyzed more quickly, leaving more time for valuable and higher-level tasks.

Sentiment analysis

Marketing

As someone in...

Marketing team.

I want to...

Analyze a sample of social media posts and comments related to the new campaign, using Copilot natural language processing to assess the sentiment and determine whether the response is positive, negative, or neutral.

Quickly put together a summary report that describes findings and uses key illustrative quotes to strengthen the story.

Microsoft 365 Copilot in Word

Prompt...

"Analyze sentiment of the campaign-related social media posts in this Word document /[Social media posts], categorizing them as positive, negative, or neutral. Create a report summarizing the findings and suggest key quotes that help to tell the story."

I'll know this is successful when...

Getting objective insight into numerous social media posts is straightforward and efficient. A report is easily produced with minimal time wasted.

The value Copilot provided me in completing this job (functional, emotional, social)

- Reduces time spent reading social media content and mental effort of categorizing many similar posts and comments.
- Summary report generation reduces time spent thinking of accompanying narrative and accelerates progress to discussion stage and application of findings.

Reporting and visualization

Marketing

As someone in...

Marketing team.

I want to...

Explore market trends and insights into key demographic influencers, such as age. Generate visualizations showing donor age breakdown and age group mean donation amounts that make data easy to quickly interpret.

Microsoft 365 Copilot in Excel

Prompt...

"Create a pie chart of existing donor breakdown by age brackets (18-30, 31-45, 46-60, 61-75, 76+) from the data in this Excel spreadsheet /[Donor demographics]."

"From the data in this spreadsheet, calculate mean donations by age brackets (18-30, 31-45, 46-60, 61-75, 76+), and create a labeled bar chart."

I'll know this is successful when...

Converting quantitative data into easily understood visualizations is easy and efficient. Accurate visualizations are produced and can be easily adapted and added to reports and presentations, etc.

The value Copilot provided me in completing this job (functional, emotional, social)

- Reduced effort and knowledge of Excel needed to perform visualization creation.
- Speeding up process of obtaining data insights frees up more time for strategizing and value-added tasks.
- Easily generated visualizations facilitates communication.

Create materials

Marketing

As someone in...

Marketing team.

I want to...

Draft a PowerPoint slide pack based on a Word document, /[Annual Report 2023-24] for presentation at a stakeholder meeting.

Copilot in PowerPoint

Prompt...

In a new PowerPoint file **select the Copilot button** and **select Create presentation from file. Select the Word document,** '/[Annual Report 2023-24] or **start typing the file name** to search for it. **Select Send** ▷ and Copilot will draft a presentation for you.

I'll know this is successful when...

A slide deck is created that details relevant information from the Word document.

The value Copilot provided me in completing this job (functional, emotional, social)

- Reduces time spent moving content into a slide deck.
- Jumpstarts presentation preparation by providing a draft which can be edited according to need.

Create campaign email

Marketing

As someone in...

Marketing team.

I want to...

Draft an email to mailing list subscribers alerting them to a new campaign and opportunities to donate.

Microsoft 365 Copilot in Outlook

Prompt...

Select New Email. To start a new message, **select the Copilot icon** from the toolbar. **Select Draft with Copilot** from the drop-down menu. In the Copilot box, **type your prompt.**

Example prompt: "Let our subscribers know about the new Children's Rights campaign. The email should include the following campaign information and donation links..."

I'll know this is successful when...

An informative email is produced with all the specified information included.

The value Copilot provided me in completing this job (functional, emotional, social)

- Reduces time and effort spent producing the first draft of an email.
- Frees up more time for value-added tasks and higher-level creative thinking about how to increase campaign impact.

Whiteboard ideas

Marketing

As someone in...

Marketing team.

I want to...

Begin brainstorming ideas around the assets needed for a new marketing campaign.

Microsoft 365 Copilot in Whiteboard

Prompt...

Select the Copilot button next to the Whiteboard toolbar. In the Copilot menu, **select Suggest.** In the compose box, **enter in your prompt** and **select the Send arrow.**

Example prompt: "Suggest a list of assets required for a new campaign launch for a nonprofit. Break any required processes down into specific suggested steps."

I'll know this is successful when...

I receive a selection of ideas ready for discussion.

The value Copilot provided me in completing this job (functional, emotional, social)

- Reduce effort to generate ideas from scratch and stimulate discussion with a more advanced starting point.

- Receive an alternative perspective and suggestions that may have been missed.

Market research

Fundraising

As someone in...

Fundraising team.

I want to...

Search and compile financial trends from successful grant proposals and funder preferences to inform and enhance our grant application strategy.

Microsoft 365 Copilot in Edge

Prompt...

"Search and summarize key financial elements from successful grant proposals and funder reports in the area of infant and young child feeding in emergencies."

I'll know this is successful when...

I receive a summary of successful grant proposals and funder preferences that I can use to inform and enhance our grant application process.

The value Copilot provided me in completing this job (functional, emotional, social)

- Reduced desk research time in finding and examining data.
- Quickly receive data-based insights into previous funding successes.
- Accelerate and guide grant application completion process.

Discover opportunities

Fundraising

As someone in...

Fundraising team.

I want to...

Discover potential donors or partners whose values are consistent with our organization's mission.

Microsoft 365 Copilot Prompt...

"Identify and summarize a list of potential donors or partners with a track record of supporting infant and young child feeding in emergencies, whose values are consistent with our organization's. Our values are listed in /[Our Values] document."

I'll know this is successful when...

I receive a list of potential donors or partners with consistent values.

The value Copilot provided me in completing this job (functional, emotional, social)

- Reduces time spent searching online for opportunities.
- Potentially identify previously unknown funding opportunities.
- Reduces time spent checking potential donors and partners for consistency with organizational values.

Draft content for a donor campaign

Fundraising

As someone in...

Fundraising team.

I want to...

Get started with producing documents for a new donor campaign, beginning with creating a first draft of a campaign plan document.

Microsoft 365 Copilot in Word

Prompt...

"Create a first draft outlining a donor campaign to raise $500,000 for building sustainable homes for families in need. Make it appeal to eco-conscious individuals and businesses, highlight donor benefits, and provide public recognition for significant contributions as detailed in /[Significant Donors]. Include emotional language and a strong call to action."

I'll know this is successful when...

A draft document outlining the new campaign is provided with specified details included.

The value Copilot provided me in completing this job (functional, emotional, social)

- Reduces time and effort spent elaborating on campaign concept with suitable narrative.
- Offers speedy insight into how final documents might look and provides opportunities for others to provide feedback.
- Accelerate progress towards reaching final stage.

Analyze data to gain insights

Fundraising

As someone in...

Fundraising team.

I want to...

Predict future giving patterns and suggest the ideal donation request amounts based on past donor behavior and demographic data.

Microsoft 365 Copilot in Excel

Prompt...

"Use regression analysis in Excel on /[Donation Records 2010–2024] to segment donors into groups and predict optimal donation request amounts, rounded to the nearest whole pound, tailored to their historical giving patterns."

I'll know this is successful when...

I receive an analysis that indicates optimal donation amounts to request from donors, and this is reflected in increased giving.

The value Copilot provided me in completing this job (functional, emotional, social)

- Provides data democratization by reducing the need for advanced statistical expertise among fundraising staff.
- Offers quick insights into data that are easily modifiable (e.g., by age group), shareable, and actionable.

Update a slide deck

Fundraising

As someone in...

Fundraising team.

I want to...

Update a proposition slide deck for relevance to pitch to an international partnership opportunity and translate the deck into the local language.

Microsoft 365 Copilot in PowerPoint

Prompt...

In a new PowerPoint file, **select the Copilot button** and **ask Copilot to add a new slide.**

Example prompts:

"Add a slide outlining our existing activities in the region, including child health and water, sanitation, and hygiene."

"Add an image of someone washing their hands."

I'll know this is successful when...

The slide deck is updated according to instructions.

The value Copilot provided me in completing this job (functional, emotional, social)

- Reduces time spent creating narrative and selecting a suitable accompanying image.

- Streamlines completion of repetitive tasks, e.g., for different potential opportunities, freeing up time and accelerating progress to delivery-ready stage.

Create draft emails

Fundraising

As someone in...

Fundraising team.

I want to...

Create a personalizable email template that can be used to thank significant donors.

Microsoft 365 Copilot in Outlook

Prompt...

Select New Email. To start a new message, **select the Copilot icon from the toolbar. Select Draft with Copilot** from the drop-down menu. In the Copilot box, **type your prompt.**

Example prompt: "Generate a brief thank-you email template for donors that can be personalized with their name, donation amount, and preferred cause. The tone should be warm and appreciative."

I'll know this is successful when...

The required email is quickly composed and can be personalized according to need.

The value Copilot provided me in completing this job (functional, emotional, social)

- Reduced time spent considering email composition.
- Reduced human error in checking for spelling and grammatical errors.
- Accelerating pace of response to significant donors, facilitating demonstration of gratitude.

Validate data

Data management

Data management.

Identify and emphasize the highest and lowest values in each revenue column throughout this Excel spreadsheet.

Validate the data by ensuring all entries in the zip code column meet the required length criteria.

"Create a conditional formatting rule in Excel that automatically highlights the cell with the maximum value in green and the cell with the minimum value in red. Ensure that this rule applies to all the columns that have the 'currency' format in this Excel spreadsheet."

"Set up a conditional formatting rule in Excel that highlights any cells in the zip code column that contain fewer than seven characters, in red."

As someone in...

I want to...

Microsoft 365 Copilot in Excel

Prompt...

I'll know this is successful when...

The highest and lowest revenues are clearly marked in green and red for easy identification.

All zip codes with less than seven characters are instantly highlighted, ensuring data consistency and accuracy.

The value Copilot provided me in completing this job (functional, emotional, social)

- Copilot streamlined the process of data analysis by automating the task of identifying critical figures.
- Copilot has assisted the process of data validation, minimizing mistakes and ensuring trust in the dataset's reliability.

Draft reports

Data management

Data management.

Create a first draft of a report in Word based on the analysis of Excel data, providing written analysis on the visuals within the /[Revenue Data] Excel spreadsheet.

I want to draft a comprehensive report that consolidates the findings from /[Revenue Summary], /[Revenue Forecast], and /[Revenue Analysis] Word documents.

"Create a structured first draft report from /[Revenue Data] Excel spreadsheet, extracting key insights and summaries. This report should include charts, tables, and written analysis about these visuals that clearly communicate the findings from the Excel data."

In **Draft with Copilot**, **select Reference a file** and **choose the** /[Revenue Summary], /[Revenue Forecast], and /[Revenue Analysis] documents (up to three files can be chosen).

Add the prompt "Create a comprehensive report by integrating and summarizing the results from each document and include key points, data comparisons, and visual elements such as charts or graphs to effectively convey the revenue trends and projections."

As someone in...

I want to...

Microsoft 365 Copilot in Word

Prompt...

I'll know this is successful when...

The Word report accurately reflects Excel insights with clear charts and analysis.

The report cohesively presents data from all three documents with clear insights and actionable conclusions.

The value Copilot provided me in completing this job (functional, emotional, social)

- Enhanced efficiency and clarity, instilling confidence in my report's professionalism and data representation.
- Streamlined report creation, boosting my confidence and enhancing the report's impact on stakeholders.

Personalized data education

Data management

As someone in...

I want to...

Microsoft 365 Copilot in Word

Prompt...

Data management.

Create a concise and easy-to-understand summary from existing guidance on regression analysis interpretation for our program coordinators focusing on volunteer engagement.

"Can you create a clear and concise summary of the guidance on interpreting a regression analysis graph, specifically relating to volunteer engagement. This summary should be designed for our program coordinators, emphasizing the practical application of the analysis in our volunteer programs and avoiding technical jargon to ensure it is easily understandable."

I'll know this is successful when...
Our coordinators can confidently understand and apply the regression analysis insights into their programs.

The value Copilot provided me in completing this job (functional, emotional, social)
- Copilot's clear summarization saves time and enables the team to deliver their volunteer programs with greater understanding.

Create presentation

Data management

As someone in...	Data management.	**I'll know this is successful when...**
		The slide deck clearly communicates the [Campaign for nonprofit] achievements, resonating with our audience.
I want to...	Generate a professional slide deck that showcases the highlights and outcomes of the [Campaign for nonprofit] using /[Organization Template 1].	
Microsoft 365 Copilot in PowerPoint	**Open the PowerPoint file** /[Organization Template 1], **select the Copilot button** and **Create presentation from file. Select the Word document,** /[Campaign for nonprofit] **or start typing the file name to search for it. Select Send** ▷ and Copilot will draft a presentation for you in the theme that you have given it.	**The value Copilot provided me in completing this job (functional, emotional, social)**
Prompt...		• Copilot's assistance in slide creation saved time and ensured a consistent, professional presentation aligned with our brand.

Create new forms

Data management

As someone in...	Data management.	**I'll know this is successful when...**
		The form reliably collects data and populates the Excel spreadsheet without errors, ready for evaluation.
I want to...	Develop a form to collect donor details and preferences, ensuring the data is automatically synchronized with an Excel workbook for tracking and analysis.	
Microsoft 365 Copilot in Forms	**Select to create a new form from scratch. Input your prompt into the required box,** "Create a form capturing names, DOB, and other information about donors."	**The value Copilot provided me in completing this job (functional, emotional, social)**
	Copilot will draft a form and suggest more fields for your form. You can refine or add more details to fine-tune the draft.	• Copilot's efficiency in form creation, field suggestion, and data syncing provided peace of mind and streamlined participant feedback analysis.
Prompt...	Copilot will suggest recommended related themes to polish the visuals of your form.	
	Distribute your form using a short URL, by Outlook or Microsoft Teams, or an embedded link.	
	Your results can be synced to Excel for analysis.	

Summarize crucial meeting

Data management

As someone in...

Data management.

I want to...

Capture the key takeaways from the security and compliance meeting and communicate them effectively to all staff members.

Microsoft 365 Copilot in Microsoft Teams

Prompt...

Turn on transcription in Microsoft 365 Copilot in Microsoft Teams.

"Can you assist me with summarizing the main points, action items, and any policy updates from the recent security and compliance meeting. Create this in tabular form for easy understanding."

I'll know this is successful when...

A meeting's outcomes, action points, and policy updates are presented clearly from a meeting that has occurred.

The value Copilot provided me in completing this job (functional, emotional, social)

- Copilot's help in distilling meeting details provided clear summarization, ensuring ease of post-meeting communications for staff alignment and compliance.

Research latest governance data

Data management

Data management.

Stay informed about the latest advancements and trends in data governance for nonprofit organizations.

I want to pinpoint organizations that share our funding patterns and interests to explore potential co-financing partnerships.

"Conduct a search for the most recent developments in the field of data governance specifically within the nonprofit sector. Summarize the findings, including any new best practices, regulatory changes, or technological innovations that could impact how nonprofits manage and protect their data."

"Please search for organizations that have similar funding sources and areas of interest as ours, with the aim of identifying possible strategic partners for co-financing opportunities. Compile a list of these organizations, including any relevant information about their funding strategies and collaborative initiatives."

As someone in...

I want to...

Microsoft 365 Copilot in Edge

Prompt...

I'll know this is successful when...

I have a concise summary of the latest data governance updates relevant to nonprofits.

I have a curated list of organizations with aligned funding interests ready for partnership outreach.

The value Copilot provided me in completing this job (functional, emotional, social)

- Copilot's efficient research on data governance trends saved time and provided valuable insights, enhancing our nonprofit's strategic planning.

- From this targeted search, Copilot has delivered strategic insights, finding potential connections for co-financing that could amplify our reach.

Email chain summarization

Operations

As someone in...

Operations.

I want to...

Extract the essential points and concerns from this email conversation for a quick and clear understanding.

Microsoft 365 Copilot in Outlook

Prompt...

In Outlook, **choose the conversation** that you want. **Select Summary by Copilot** at the top of the email thread.

The summary will appear at the top of the email and may also include numbered citations that, when selected, takes you to the corresponding email in the thread.

I'll know this is successful when...
I have a clear summary of the email chain's key points and issues, ready for swift decision-making.

The value Copilot provided me in completing this job (functional, emotional, social)

- Copilot's concise summarization saved time and reduced complexity, enhancing my focus and efficiency in my working day.

Creative inspiration

Operations

As someone in...

Operations.

I want to...

Identify the best layout options for our report by evaluating a range of design choices.

Microsoft 365 Copilot in PowerPoint

Prompt...

In a new PowerPoint file select the Copilot button and type "Create presentation about a report for a nonprofit, keep the content empty."

Select Send and Copilot will draft a presentation for you. **Click the Try a new design button.**

You can try this multiple times until you find something you like.

I'll know this is successful when...
The report's layout is visually appealing and guides readers effortlessly through the content.

The value Copilot provided me in completing this job (functional, emotional, social)

- Copilot's design recommendations enhanced the report's functionality and aesthetics, making the information more accessible and engaging for our audience.

Communication, productivity, and well-being

Operations

I'll know this is successful when...

I am confident that the email reflects a formal tone and conveys respect and professionalism as requested.

Team members can effectively manage their tasks and maintain focus throughout the day with the help of the checklist.

The value Copilot provided me in completing this job (functional, emotional, social)
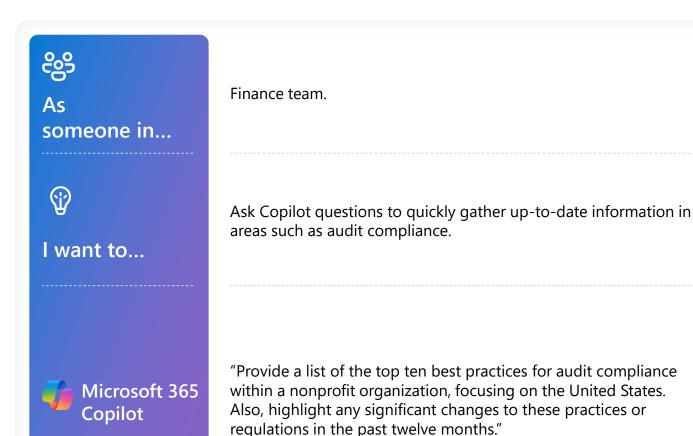
- Copilot's review ensured my communication was polished and appropriate, boosting my confidence in maintaining professional workplace relationships.

- The customized support provided a functional tool that catered to individual needs, fostering a more inclusive and productive work environment.

Research audit compliance

Finance

As someone in...

Finance team.

I want to...

Ask Copilot questions to quickly gather up-to-date information in areas such as audit compliance.

Microsoft 365 Copilot

Prompt...

"Provide a list of the top ten best practices for audit compliance within a nonprofit organization, focusing on the United States. Also, highlight any significant changes to these practices or regulations in the past twelve months."

I'll know this is successful when...

I receive a list of relevant best practices that I can consider and action within the organization.

The value Copilot provided me in completing this job (functional, emotional, social)

- Quickly identify any recent changes to audit requirements and enhance compliance.
- Increase operational efficiency by freeing up time to focus on implementing best practices.

Effective Accounts Payable/Accounts Receivable documents

Finance

As someone in...

Finance team.

I want to...

Create a selection of Accounts Payable/Accounts Receivable documentation that reflect organization branding and consistent formatting, starting with an invoice reminder.

Microsoft 365 Copilot in Word

Prompt...

"Create an invoice reminder for overdue payments, based on the format from /[Invoice] document. This should contain space for the recipient's name, invoice reference, amount due, payment terms, overdue duration, original due date, payment instructions, and deadline for payment."

I'll know this is successful when...

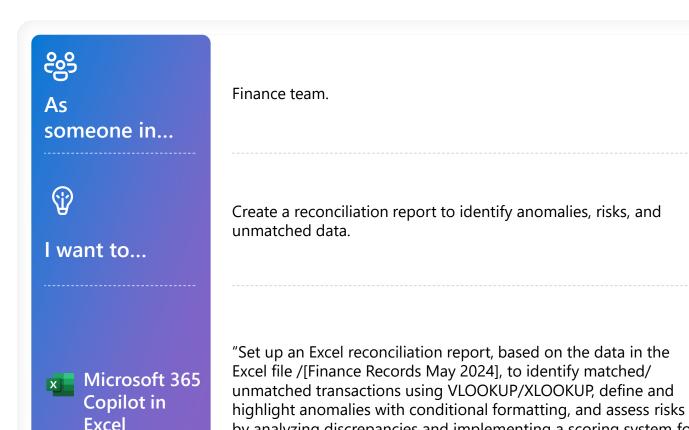Copilot generates the desired document, which follows the format from the specified document.

The value Copilot provided me in completing this job (functional, emotional, social)

- Reduced time spent creating many similar documents.
- Consistent format reliably and quickly reproduced.

Automate data reconciliation

Finance

As someone in...

Finance team.

I want to...

Create a reconciliation report to identify anomalies, risks, and unmatched data.

Microsoft 365 Copilot in Excel

Prompt...

"Set up an Excel reconciliation report, based on the data in the Excel file /[Finance Records May 2024], to identify matched/unmatched transactions using VLOOKUP/XLOOKUP, define and highlight anomalies with conditional formatting, and assess risks by analyzing discrepancies and implementing a scoring system for severity evaluation."

I'll know this is successful when...

I receive a reconciliation report detailing the specified information.

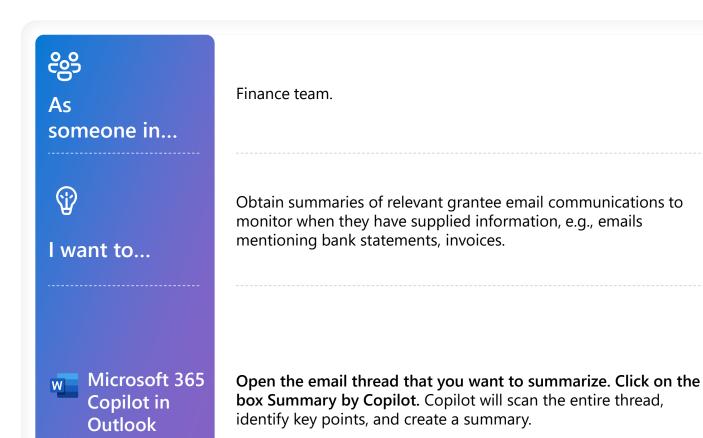### The value Copilot provided me in completing this job (functional, emotional, social)

- Reduces time spent preparing financial reports.
- Swift detection of anomalies, errors, and potential fraud.
- Supports budget management and strategic decision-making.

Grantee communication summaries

Finance

As someone in...

Finance team.

I want to...

Obtain summaries of relevant grantee email communications to monitor when they have supplied information, e.g., emails mentioning bank statements, invoices.

Microsoft 365 Copilot in Outlook

Prompt...

Open the email thread that you want to summarize. Click on the box Summary by Copilot. Copilot will scan the entire thread, identify key points, and create a summary.

I'll know this is successful when...

I receive an accurate summary for each email chain that I perform this process for.

The value Copilot provided me in completing this job (functional, emotional, social)

- Reduces time spent searching through emails.
- Offers a quick overview of email communications to support grantee monitoring.

03

Gap assessment and business value

Gap assessment and business value approach

Leveraging existing foundational use cases, while also identifying new ones by addressing global nonprofit pain points and aligning with organizational strategic objectives and value drivers, we developed a prioritized list of use cases and a defined list of benefits to be realized through adoption.

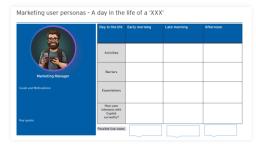**Microsoft 365 Copilot foundational use cases**

Tech for Social Impact framework

Use cases based on global nonprofit pain points

Strategic organizational objectives

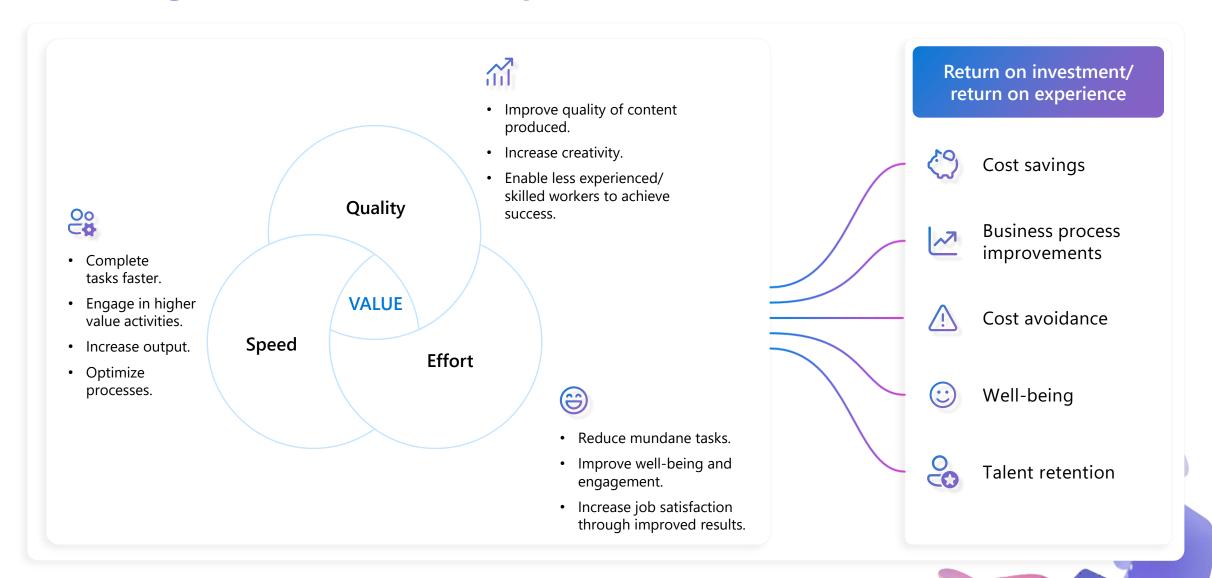**Nonprofit user persona specific pain points**

Benefits realized through the adoption and use of the prioritized use cases

Defining Microsoft 365 Copilot value

Quality
- Improve quality of content produced.
- Increase creativity.
- Enable less experienced/ skilled workers to achieve success.

Speed
- Complete tasks faster.
- Engage in higher value activities.
- Increase output.
- Optimize processes.

Effort

VALUE

- Reduce mundane tasks.
- Improve well-being and engagement.
- Increase job satisfaction through improved results.

Return on investment/ return on experience

- Cost savings
- Business process improvements
- Cost avoidance
- Well-being
- Talent retention

Early Access Program survey results

All up value

70% are more **productive**

68% improved the **quality of their work**

37% feel more **fulfilled at work**

71% spend less time on **mundane tasks**

Value by workflow

64% spend less time **processing email**

75% spend less time searching for **information in their files**

84% find it easier to **take action after a meeting**

3.8x faster at catching up on **missed meetings**

85% get to a good **first draft faster**

Value by role/ function

79% reduced their **administrative workload**

68% keep their CRM **up-to-date with less effort**

67% spend more time with their **customers**

64% better personalize customer **engagements**

How much is Microsoft 365 Copilot worth to users?

77% Choose Microsoft 365 Copilot over free lunch

77% Would not want to go back to working without Microsoft 365 Copilot

30% Access to Microsoft 365 Copilot would influence my choice of employer

Prioritized use cases aimed at better aligning with nonprofit's objectives

Prioritized use cases have been mapped out in an adoption roadmap*—categorized as "Now," '"Next," and "Beyond"—based on impact/value vs. effort analysis and aligned with Microsoft 365 Copilot capabilities to ensure continuous value generation

	Now	Next	Beyond
Foundational use cases	• Recap a meeting • Summarize an email thread • Draft an email • Summarize a document • Tell me about a topic/project • Give me some ideas for … • Help me write … • What did they say … • Revise this content • Transform a word document to a PowerPoint		
Nonprofit specific use cases	• Identify trends and segments • Draft and develop a campaign • Share and mobilize • Identify key metrics to monitor in nonprofit context • Make data insights accessible to nonprofit users who are non-data experts • Grant writing proposal • Grant tracking and reporting • Network expansion • Donor recognition • Donor campaign planning and design • Report creation • Insight-driven decision-making • Summarize and share results • Enable non-data specialists to engage with data through prompts • Job posting & screening • Logistics management • Assist neurodiverse team members with basic tasks—planning or prioritization • Content, layout options, and redaction for reports • Prioritize emails based off a certain predetermined criteria	• Grantee evaluation • Financial projections • Audit compliance • Identifying co-financing opportunities and matches from portfolio • Support increased data literacy by offering a first point of contact for data queries • Scoring funding proposals against quality standards • Suggest some value-based interview questions • Generate job descriptions for nonprofit-specific roles • Predictive analysis for increased donations • Analyze donor datasets to work out an optimum value to ask for from a donation • Data-led insights into crafting donor experiences • Quality assurance • Security & governance • Performance and professional development	• Timetabling meetings with multiple invitees • Monitor campaign impact through social media content analysis • Provide knowledge repository of past strategies to inform future decisions • Help staff navigate organizational structure where not all departments have a data specialist • Accounts Payable/Accounts Receivable processes • Generate schema based on system architecture • Improve coding and macro efficiency for staff with varying training/experience • Generate insight into resource management for new incident-response alongside ongoing commitments • Answering of questions, regarding who is the appropriate team to approach with certain requests. • Group task management across Kanban boards • Scheduling meetings into calendar day-to-day and further calendar management • Review resumes based on key criteria for a given job role • Review the previous few years' agenda plan and create a draft agenda for the incoming year • Develop chatbot function for niche safeguarding queries using internal policies and external data • Ingest organizational policies and provide guidance

This is a rough indication of feasibility and timelines will be reliant upon nonprofit's decision-making around scope and resourcing to support successful Microsoft 365 Copilot adoption

04

Nonprofit AI policy guidelines

Nonprofit AI policy guidelines

Although every nonprofit organization will have specific requirements their policy will have to align to, there are some key topics that we encourage each of you to consider and incorporate as part of the preparations that go into the setup, use, and monitoring/maintaining of your Copilots.

Governance policy

Establish governance policies to manage Microsoft 365 Copilot usage within your organization:

1. Review existing governance policy, specifically across Microsoft 365.
2. Develop further policy points in relation to the deployment of Copilot, defining roles, permissions and access controls that will enable its use but protect your organization against unintentional access/sharing.
3. Align the new elements against existing data governance and compliance policies to support consistency and simplified guidelines for individuals.

Privacy & security

Establish privacy and security policies to manage Microsoft 365 Copilot usage:

1. Review existing security policy, specifically across Microsoft 365.
2. [Review existing information regarding Microsoft 365 Copilot](#)
3. Amend current policy to address concerns around privacy and comply with local regulation and legal requirements based on your organization.

Responsible AI

Establish guidance and policy with regards to Responsible AI:

1. During the implementation of Copilot and other AI, appropriate consideration across data ethics, transparency, and retention.
2. Existing policy should be reviewed and updated to include additional considerations.
3. Maintain and monitor all policies to align to the changing landscape and attitudes towards the use of AI.

Policies should be developed ahead of implementation, but reviewed regularly to ensure alignment to usage, and capability of Copilot, therefore, should be considered "living documents" keeping track of regulatory and legal compliance.

Learning from Microsoft's governance, security, and compliance practices

Bring the right people into the conversation

Don't keep this conversation in the IT sphere alone. Bring in all the relevant security, legal, and compliance professionals.

Build a foundation for automation

Microsoft Purview Data Loss Prevention has powerful, intelligent detection, but it relies on establishing good defaults.

Think about how your employees will use Microsoft 365 Copilot

Determine the primary use cases for Microsoft 365 Copilot. The kinds of collaboration and access employees need will affect your default labeling architecture.

Take this opportunity to train employees

If you've been looking for an excuse to refresh employee knowledge around data privacy, let this moment be your milestone. It will be far easier to start with a clean data estate.

Don't overwhelm your employees

Make labeling simple and intuitive, and ensure it isn't overwhelming. Employees should have a limited set of choices to keep things comprehensible. It's also valid for different employees to see different choices.

Balance good governance with time to value

Because of the scope and complexity of Microsoft's deployment, we took a very thorough approach to governance. If speed is your priority, you might consider a faster deployment with a less comprehensive governance approach, for example, using Restricted SharePoint Search to restrict both Enterprise Search and Copilot experiences to a curated set of SharePoint sites of your choice.

Policy checklist based on Microsoft's implementation of Copilot

When developing your specific governance policy, the following should be considered

1

Labeling
- ❑ Develop a labeling taxonomy. Include:
  - ❑ Classification levels, not exceeding five primary labels and five sublabels
  - ❑ Descriptions clearly outlining the label meaning for employees
  - ❑ Examples to clarify usage for employees
- ❑ Determine policies and settings that correspond with labels. Consider the following:
  - ❑ Storage type and location
  - ❑ External allowance
  - ❑ Encryption
  - ❑ Access control
  - ❑ Data destruction
  - ❑ Data loss prevention
  - ❑ Public disclosure
  - ❑ Logging and tracking access
- ❑ Establish container defaults.
- ❑ Configure container labels to set the default file label in document libraries.
- ❑ Initiate an employee education initiative.

2

Data loss prevention
- ❑ Configure Microsoft Purview Data Loss Prevention standards and quarantining protocols.
- ❑ Establish lifecycle management and attestation protocols.
- ❑ Configure Microsoft Graph Data Connect to discover where you are oversharing.

3

International compliance
- ❑ Initiate conversations with local subsidiaries.
- ❑ Engage works councils or other advocacy bodies.
- ❑ Address concerns.
- ❑ Determine the feasibility of regional deployment and segment if necessary.

AI principles and considerations

When defining your policies in line with the implementation of Copilot, the advice is to consider your wider AI related considerations and policy needs. Below are key principles and considerations to prompt your thinking in this.

Fairness
Striving for fairness by avoiding discriminatory outcomes or assumptions in decision making by models.

Reliability & safety
Prioritize this to minimize risks and prevent unintended consequences.

Privacy & security
Safeguarding user privacy and ensuring the security of AI systems and data.

Inclusiveness
AI systems need to consider diverse perspectives, avoid bias, and promote equitable outcomes for all users.

Processing location
Review where the data will be held during processing and saved, consider the implications of this based on data sensitivity and regulations.

Agreed use
Review the purpose of data collection and reflect if that will align with the potential future use if accessible by Copilot.

Transparency
The use of Copilot or other AI tools should be declared as appropriate with the source information made available where necessary.

Accountability
Be accountable as individuals for the outputs of any prompts run through Copilot and review and adjust products as appropriate.

Bias
Addressing biases in AI models so that it doesn't discriminate or hinder different races, disabilities, or backgrounds.

Over-reliance
With over-reliance we risk losing the experience, expertise, and intuition of individuals. Ethical and contextual reviews should always be included before relying on outputs of Copilot.

New feature roll out
As additional features are rolled out and existing ones refined, policies should be kept up to date and considerations expanded to include these features including risks, regulation, transparency, and user consent.

Data reuse
Linked closely to agreed use, the way in which Copilot will reuse data across Microsoft 365 for different purposes will need to be understood and limited as appropriate.

05

Benefit roadmap to adoption

Adoption framework—process

Our process for developing an adoption framework for Microsoft 365 Copilot in nonprofit organizations involves leveraging an existing Microsoft cross-sector adoption framework, conducting further research to tailor the approach, and actively consulting with nonprofit entities to ensure the framework meets their unique needs.

Research	Existing AI use policies

The majority of nonprofit donors want to be made aware of how AI is being implemented—in particular 77% of high donors.

The top concerns with implementing AI in the nonprofit sector are reductions in the number of people in the workforce and data security concerns.

Maintaining trust and a good relationship with donors and financial contributors is essential to a nonprofit, as well as maintaining a good relationship with staff and volunteers.

Source: What the public think of charities using AI (cafonline.org)

The latest report on responsible AI from Microsoft can be found at the following: https://aka.ms/RAITransparencyReport2024PDF

Previously existing responsible AI policies from nonprofits will also help in creating the adoption framework. These internal policies should be integrated with the available Microsoft responsible AI policies.

Five drivers of AI readiness

Business strategy
How AI supports your business goals.

Technology and data strategy
Data and infrastructure to fuel and run AI solutions at scale.

AI strategy and experience
AI expertise and repeatable processes to create sustainable value.

Organization and culture
Leadership vision, operating model, skills, resources, and culture.

AI governance
Processes, controls, and accountability structures to govern data privacy, security, and responsible use of AI.

Start your AI journey today

Nonprofit pricing now available for Microsoft 365 Copilot

Boost productivity and amplify creativity with Microsoft 365 Copilot, your AI assistant for work, now available to eligible nonprofits for $25.50 (USD) per user, per month with an annual subscription and billing cycle.

[Learn more](#)

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