Agenda

Risa Coleman
Nonprofit Contact Us
Robert Camp
Microsoft Cloud for Nonprofit Update
Chris Zimney
News Tip
Risa Coleman
Community
Ian Drew
TSI Contact Us

Robert Camp
Nonprofit Operations – ‘NPOperations’ alias retired

Start using the Contact Us form to submit to log issues, ask questions, seek escalations

- We have support agents available in all regions and time zones
- You will have a ticket number to track each issue submitted
- You will receive more timely responses and resolutions
- You will be able to provide feedback on every issue
- You will be able to confirm the resolution of every issue
Microsoft Cloud for Nonprofit Fall updates

Chris Zimney
Microsoft Cloud for Nonprofit vision

- Secure donor & program participant data
- Know your donors and supporters
- Accelerate mission outcomes
- Deliver effective programming
Constituent Management

Personalized Engagement
NEW! Marketing insights in Fundraising and Engagement

Donation & Award Management
NEW! Improved donation imports

Volunteer Management

Program Delivery

Unified Data
NEW! Salesforce data connector

Constituent Analytics

Secure donor & program participant data

Accelerate mission outcomes

Deliver effective programming

User & Administrator Experience
NEW! Resource pages in Fundraising and Engagement and Volunteer Management

NEW! Automated Azure deployment for Fundraising and Engagement

Secure donor & beneficiary data

Secure the hybrid environment

Integrate security tools

Deliver rapid, intelligent results
Marketing insights in Fundraising and Engagement

What is it

- New tab in Fundraising and Engagement that links to D365 Marketing
- Shares information about how constituent interact with marketing campaigns and events

What customer challenges does it solve

- Lack of insight into how donors are engaging with the organization outside the development department
- Data silos between departments

Benefits

- 360-degree profiles help staff understand how donors interact with the organization across channels
- Deeper constituent knowledge
- Enhanced collaboration between development and marketing departments
- Provide fundraisers with marketing results
- End-to-end integration of data and processes between fundraising and marketing teams
Resources guides

What is it

- New Resources guides in Fundraising and Engagement and Volunteer Management provide users with self-help tools and guidance, with links to training, solution documentation, support, and user community

What customer challenges does it solve

- Fear/intimidation of new technology
- Difficulty and user frustration in learning how to use new technology
- Time spent on solution adoption
- Change management
- Helps train and onboard users

Benefits

- Easier and faster solution adoption
- Improved user experience
- Users can easily navigate to training courses and technical documentation, connect with users outside their organization, and request support
Simplified Azure deployment

What is it

• Automated Azure deployment for Fundraising and Engagement using a step-by-step wizard

What customer challenges does it solve

• Number one issue in deploying Fundraising and Engagement
• Difficulty with the complex, manual process to deploy Azure when adopting Fundraising and Engagement
• Only users with technical expertise (previous Azure experience) can currently deploy Fundraising and Engagement

Benefits

• Faster, easier set up of Fundraising and Engagement
• Improved administrator experience
• Opens the door for users who aren’t IT experts to deploy Fundraising and Engagement
• Easier for smaller nonprofits to adopt Fundraising and Engagement
• Reduced security risks
Improved donation import

What is it
- A process improvement that makes it easier for users to import donations into Fundraising and Engagement
- It used to take seven clicks to get to the donation import screen—now it just takes one click
- Guided, step by step data import process that gives a data preview and does lightweight data validation

What customer challenges does it solve
- Hard to find donation import function
- Data import process is not intuitive
- Error codes aren’t helpful

Benefits
- Improved user experience
- Simpler, guided process to import data
- Lightweight data validation to improve accuracy
- Error codes now provide information to help users navigate and fix errors
- Staff will have better data for decision making
Salesforce data connector

What is it

- Data connector enables users to copy, transform, enrich, analyze, and bidirectionally move data from Salesforce into Azure (or other third-party services)

What customer challenges does it solve

- Enables Salesforce users to power business decisions in a cost-effective way by leveraging Microsoft’s vast collection of tools to analyze, process, manipulate, and store data
- Salesforce users can use data integration to use their preferred Microsoft and Salesforce services in coordination

Benefits

- Increases technology efficiency and reduces costs through data interoperability
- Brings the power of the Azure services to Salesforce users, enabling them to utilize Microsoft’s best-in-class AI and data services including analytics, machine learning, archiving, data discovery, classification and compliance
- Customers can uncover insights from a unified data state with hundreds of additional connectors leveraging Azure and Microsoft Purview services

More info about the data connector
Nonprofit partner readiness

1 Training & GTM Materials

- Learning videos, presentations, and GTM assets curated and available on-demand to partners on https://aka.ms/nonprofitpartnergallery
- Technical documentation on a variety of topics; from how to license to how to deploy at https://docs.microsoft.com/en-us/industry/nonprofit/

2 Environment and Demos

- Set up a pre-production environment in your tenant at https://experience.dynamics.com/requestlicense/ and select the “Microsoft Cloud for Nonprofit – Standard” SKU
- Create Demos for your customers using the Nonprofit CDX at https://aka.ms/nonprofitcdx

3 Partner Community

- Engage the Nonprofit partner community
  - For the latest updates: https://aka.ms/partnersforsocialimpact
  - For technical and partner-to-partner discussions: https://aka.ms/cdmfornonprofits
Nonprofit News Tip of the Month

Risa Coleman
Nonprofit News Tip of the Month

**Twilio.org:** State of Nonprofit Digital Engagement Report 2022

Read [Twilio.org State of Nonprofit Digital Engagement Report 2022](https://www.twilio.org/) for full details on the 5 key takeaways:

1. Nonprofits outpace the private sector in digital engagement
2. Digital communications are key to improving program outcomes
3. Developers are the secret sauce for digital leaders
4. Program participants feel the personalization gap
5. Several segments of the nonprofit sector pull ahead in digital maturity
Microsoft is a Leader in 2022 Gartner Magic Quadrant for UEM - Microsoft Security Blog

To read the full report click on Gartner Reprint

- Microsoft Endpoint Manager is the native Microsoft solution, providing deep integration with Microsoft 365 and Microsoft Azure to improve employee security and the IT administrator experience.

- Customers like being in control of when they migrate to the cloud. The improvements we have made in tenant attach and hybrid Microsoft Azure Active Directory (Azure AD) mean that customers can have many choices in how to co-manage their devices.

- Customers are reassured by Microsoft’s ongoing investments in Endpoint Manager.
Questions?
Join our community

**Step 1:** Go to the Partners for Social Impact Community at [https://aka.ms/JoinPSI](https://aka.ms/JoinPSI)

**Step 2:** Sign in and join as a member to gain access to public discussions and content.

**Step 3:** Access the gated content by requesting access here. Look for “partner readiness.”

**Step 4:** Upon verification, you will gain access to gated conversations and content under “partner readiness.”

**Step 5:** Click on “partner readiness” and find the latest thread discussing partner readiness materials and our monthly community calls.
o Join our community conversation

o Discover the Microsoft Cloud for Nonprofit nonprofit hub

o Empower nonprofit organizations with Microsoft tools and services get them to Register now

o Learn more about our nonprofit product grants and discounts in our Frequently Asked Questions

o Contact nonprofit support
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