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A Buyer's Guide to Microsoft Dynamics 365 Sales & Service for Not-for-Profits

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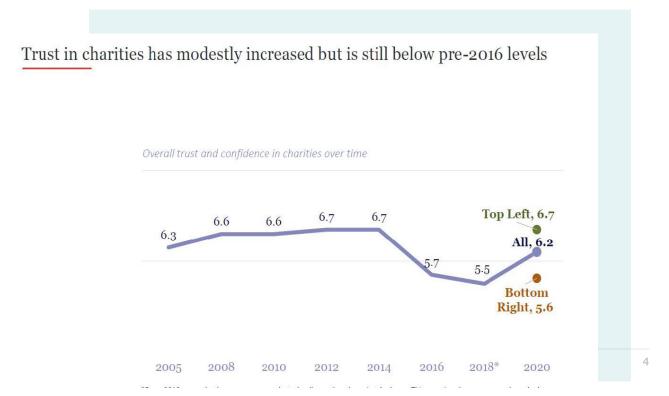
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Introduction

Customer Relationship Management (CRM) solutions transform the way Not-for-Profit organisations take control of all their supporter interactions.

Yet, lack of ownership and control of data have been identified as primary causes of why people feel negatively towards charities. According to the NfP Synergy "Fundraising Around the World" report released in March 2019, only **52% of the British public trust charities.** Up until 2014, trust in charities sat at an **average of 67%,** highlighted by the Charity Commission's 2018 report, but has been on a downward trend since then. Since 2019, trust and confidence in charities has increased but has still not recovered to its pre-2014 levels.

What's become clear is that charities are now under pressure from the media, the government and their own supporters to take responsibility of the effects of their marketing campaigns and data management activity. And CRM solutions do just that.

This guide has been written to help Not-for-Profit organisations with their CRM buying journey. We outline the key questions that our customers, organisations like yours, asked when they were considering a new CRM solution.

Trust in charities has modestly increased but is still below pre-2016 levels

Overall trust and confidence in charities over time

6.3   6.6   6.6   6.7   6.7   5.7   5.5

Top Left, 6.7

All, 6.2

Bottom Right, 5.6

2005   2008   2010   2012   2014   2016   2018*   2020

1. Can I get a single view of my supporters?

Not-for-Profit fundraising professionals expect to be able to access the full spectrum of supporter data. Yet many charities are missing out on opportunities because donor management solutions fail to combine information such as volunteer activity with donations.

Research shows that volunteers donate twice as often to charity as non-volunteers. So it's crucial that you can report on engagement levels amongst supporters who volunteer as well as those who donate.

Based on Microsoft Dynamics 365 Sales & Service, NfP 365 is a CRM solution that has been pre-configured for the Not-for-Profit sector to support marketing and fundraising teams with their unique objectives.

With NfP 365, you can manage donations and pledges, track time donated by your volunteers, and obtain a 360-degree view of each supporter. You can also track results of programmes and fundraising campaigns to show your donors the effectiveness of their efforts and donations.

NfP 365 brings together information from sources such as online giving platforms, interactions via your website and social media, and information from your finance system to provide that single view. From this, you can profile, segment and target your supporters through in-built marketing functionality for personalised and relevant communications

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2. How do I make sure I'm complying with the current regulations?

A number of Not-for-Profit organisations have faced criticism in regard to excessively targeting old and vulnerable supporters. Following this, the Fundraising Regulator was established which is overseen by the Charity Commission.

The Charities (Protection and Social Investment) Act hands power to the Charity Commission and enables them to give direction to charities to discontinue a course of action, remove trustees or close the charity entirely. The objective of the Act is to create a socially acceptable approach to charitable engagement.

A survey of 2,000 UK residents by KPMG found that the public have significant concerns about trusting charities with their data. When asked if they would be willing to share personal information such as bank details or addresses with charitable organisations only 11% said they would.

Charities wanting to commit to the Code of Fundraising Practice can register with the Fundraising Regulator. By doing so, these charitable organisations are agreeing to apply and abide by the rules stated within the Code. An appropriate digital solution like Dynamics 365 can really help charities to adhere to the Code as well as bringing them many other benefits. From one central place, charities can build strategic marketing campaigns informed by data, report and track their fundraising performance and automate marketing activity.

The use of donor-centric technology will help charities engage in transparent fundraising activities and avoid issues of harassment. When charities are asked to report on their activities, CRM has the tools to help them show total transparency.

With NfP 365, the Consent and Preference Portal allows your donors to update their preferences in real time. Also, you not only control the security of your data, you also have complete auditability. A request for a legacy is a sensitive subject and to avoid annoying potential benefactors, it's essential for charities to have comprehensive visibility of their own actions.

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3. How can I see the impact of online giving on my campagin performance?

There is no doubt that charitable giving through online platforms is rising. Online one-off donations swelled by 561% in three months to 30 June 2020, compared to the same period of 2019, via WPNC's goDonate Platform. Monitoring online giving donations within the context of your campaign performance metrics, as opposed to logging into the admin panels of each online giving platform you use and exporting figures from there, significantly reduces the time spent and the inaccuracies that appear in your reports.

NfP 365 integrates with all major online giving platforms as standard. With NfP 365 you can manage donations and pledges and specify how to respond to money pledged through online giving integration. For example, you can automatically prompt a phone call to any donor who pledges more than £50 and trigger the thanking process.
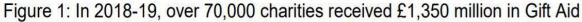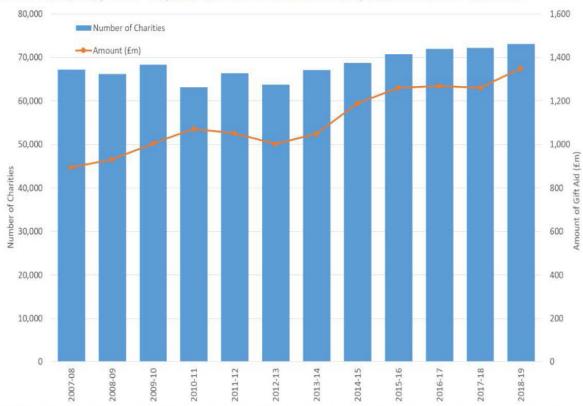
4. Is it easy to reclaim Gift Aid?

As a charity, you can reclaim Gift Aid on donations made by UK income taxpayers, assuming they have completed a Gift Aid declaration. However, it can be difficult to manage Gift Aid because of the complexities surrounding what can and can't be claimed.

NfP 365 has built-in intelligence that automatically detects which payments are eligible for Gift Aid. It then generates the required claim, ready for it to be checked and audited before submission to HMRC.

HMRC reported in 2018-19, over 70,000 charities received £1,350 million in Gift Aid.

Figure 1: In 2018-19, over 70,000 charities received £1,350 million in Gift Aid

From 2007-08 to 2012-13, the figures above are by year of claim. From 2013-14, the figures above are by year of repayment.

5. Can I effectively target my marketing campaign?

The most effective marketing campaigns are ones that send the right messages to the right people at the right time. It's essential for charities to understand their supporters in order to be able to talk to them in the best way using the most appropriate channel.

The intelligence captured by NfP 365 helps charities to understand supporter interactions and build targeted campaigns with the objective of generating long-term support. A/B split testing means you can trial a campaign message before broadcasting it to a wider audience.

A UK CAF report 2020 highlighted that there was a significant increase in online giving due to the COVID-19 Pandemic.

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6. Can I integrate with third-party software?

We find that when organisations (Not-for-Profit and commercial) are looking for a new solution, there is a tendency to put together an all-encompassing wish list at the discovery stage. So far so good. But there is one trip hazard of this approach that catches out marketing and fundraising leaders. That is expecting all the different disciplines and sales and marketing practices to be effectively addressed by a single solution.

Charities choose NfP 365 because it integrates. Integration is the best of both worlds. It allows your employees to work with leading specialist tools that are designed to be the best at what they do and it allows the managers to see the holistic results and metrics all in one place. Removing manual exporting and cobbled together reports.

Some of the event management functionality of NfP 365 is courtesy of Eventbrite or Cvent, and legacy data from First Class, the list goes on. In fact, it's Microsoft's ability to easily integrate with so many third-party software solutions that makes it the number one choice for charities when optimising relationships with supporters.

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7. Are there tasks that I can automate?

Automation allows charities who are under-resourced to engage with their supporters across a number of channels at any one time. As a marketing or fundraising manager, you may not be able to respond to every interaction as it happens. Yet timely and personalised communications are vital to driving engagement with supporters.

Charity marketing automation enables you to respond to supporters via their chosen channel in a timely manner, with a message that's personalised through the creation of 'workflows'.

Supporters that register for an event can automatically join a journey, relevant to that event and be sent updates, countdowns and further information. New donors can receive 'thank you' messages and news about the direct impact of their specific donation. Charity marketing automation is a simple case of 'drag and drop' so it's easy to send the right message, to the right supporter, at the right time.

In-built marketing functionality allows you to profile, segment and target supporters within a single system, which means you avoid re-keying data. It also ensures any marketing interactions are recorded on a supporter's record to aid the creation of a single view.

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8. Can a CRM system make reporting easier?

A fundamental element of any CRM system is to make management reporting easier. Today's charity needs to view and report all donation, membership and interaction intelligence from a single, easy-to-view customisable dashboard.

With NfP 365, familiar Microsoft functionality allows non-technical users to extract data with ease, exploring trends and relationships, drawing conclusions to support improvements in campaign management and fundraising.

Standard dashboards are also readily available, allowing you to see top ten donors, donations and pledges per year, and perform analyses based on location, age range, demographics and more. Advanced reporting allows you to evaluate the success of campaigns and to benefit from improvements in campaign execution and fundraising efforts. Without analysis, data is meaningless. So find a dashboard where analysis can be done easily and where the data can be sliced and segmented in a way that works for you.

9. How does the wider Microsoft ecosystem integrate with itself?

Microsoft has created a powerful ecosystem with new cloud infrastructure and services. With Microsoft enterprise products and cloud services being so tightly integrated, it provides strong incentives for organisations. The question is how does it provide those incentives? Well, for example, Dynamics 365 is seamlessly embedded with Office 365, including Teams, One Drive and SharePoint with a single and secure login with Active Directory. So, with Microsoft's investment in Azure, success with Office 365 and with a range of services available such as machine learning, cognitive services and more, all of this technology works together to drive digital transformation within your organisation.

A digital transformation is about creating value for the customer by bringing people together, being data driven, and streamlining processes. The Microsoft ecosystem therefore allows organisations to unlock limitless potential by drastically changing how you operate internally. The Microsoft ecosystem leverages digital transformation by enabling innovation through technology, and by pushing into the intelligent cloud. This creates a productive workspace that helps your charity's employees achieve more. It optimises operations that assist in building state of the art digital services on scalable platforms and engages with your supporters to provide even greater value.
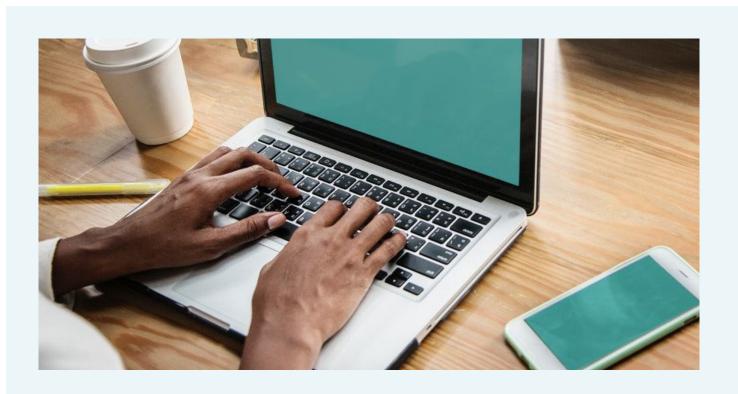
10. Is the CRM simple to use from any device?

It's important to consider the user experience you want for your wider team. The time it takes for them to become familiar with the new software will determine how soon you benefit from your investment. If your supporters and staff can connect with you from any device at any time from any location, it makes user adoption faster and simpler.

NfP 365 has been architected from Microsoft Dynamics 365 Sales and Service making it intuitive and easy to use.

Information can be accessed anywhere, anytime, by anyone who is authorised to do so. Whatever your location, you can access the vital information you need.

We hope these questions will help you on your CRM buying journey. If you'd like to discover more about our NfP 365 solution, based on Microsoft Dynamics 365 Sales and Service, contact m-hance to talk to our CRM experts.

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m-hance is a Microsoft Gold Partner and leading provider of Microsoft Dynamics solutions tailored for the Not-for-Profit sector. We've worked with over 80 Not-for-Profit organisations including Oxfam Ireland, Christian Aid, Concern Worldwide, Solent Mind, The Children's Society and the Motor Neurone Disease Association. Helping these charities to optimise fundraising campaigns, manage their volunteers, reclaim Gift Aid and VAT, track costs, control purchases and much more through the solutions that we offer. What's more, because we've worked in this space for almost 20 years, we understand the unique obstacles and challenges that charities face and how our solutions can help to overcome them.

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