



# Crash Course in Fundraising and Engagement

Six ways to be a great fundraiser during challenging times



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# Introduction

With today's global pandemic and economic uncertainty, the demand for critical nonprofit services is higher than ever. At the same time, some nonprofits are facing fundraising shortfalls forcing them to lay off staff and reduce services. Thus, nonprofits need to build and maintain lasting relationships with donors and funders to sustain their mission.

To achieve that, your nonprofit needs immediate access to real-time information on both loyal donors and prospects so you can engage them in a personalized way. You also need to be transparent about how their donations will be used and keep them informed of the impact of their contributions. Above all, you need to drive efficient operations to maximize the amount of funding going into programs and services to advance your mission.

The good news is that many nonprofits that started implementing cloud-based solutions before COVID-19 have successfully adjusted,

and even reinvented, how they interact with donors and raise funds. This is allowing them to continue their critical work and maximize the impact of every dollar entrusted to them.

To help more nonprofits gain these benefits, Microsoft built Fundraising and Engagement, a part of [Microsoft Cloud for Nonprofit](#). Fundraising and Engagement is built on Dynamics 365 Sales and takes advantage of the full Microsoft stack with its best-in-class cloud infrastructure through Azure, unified experiences with Office 365 and Teams, and now with LinkedIn Sales Navigator integration, nonprofits can simplify constituent research and elevate the stewardship of sponsors, donors, and institutions by harnessing the power of their organization's network. Fundraising and Engagement also includes business intelligence, reporting, analytics, and other nonprofit-specific capabilities to help nonprofits engage more effectively with their donors and raise critical funds to continue their mission.



**This e-book provides key tips and tricks for how you can use Fundraising and Engagement to increase your mission impact during the current challenges... and those to come.**




# Connect with donors digitally

## Tip 01

01 02 03 04 05 06







# 60-70%

Today's donors and funders are increasingly technologically savvy. According to a recent survey conducted over six countries, **60-70 percent of donors say nonprofits should use more digital technology**, such as social media, online portals, mobile apps, and handheld devices to communicate with people they interact with and serve.<sup>1</sup>

This is good news. During these times when in-person meetings may not be possible, many funders and constituents may be very open to digital interactions with your organization through:



**Video online meetings.** You can safely and securely meet “face-to-face” with donors and constituents, without being in the same location, using Microsoft Teams. This helps you maintain a personal connection with new and repeat donors even when you can’t meet in person. It can help your organization save money and save time for both you and your donors.

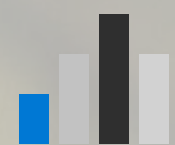
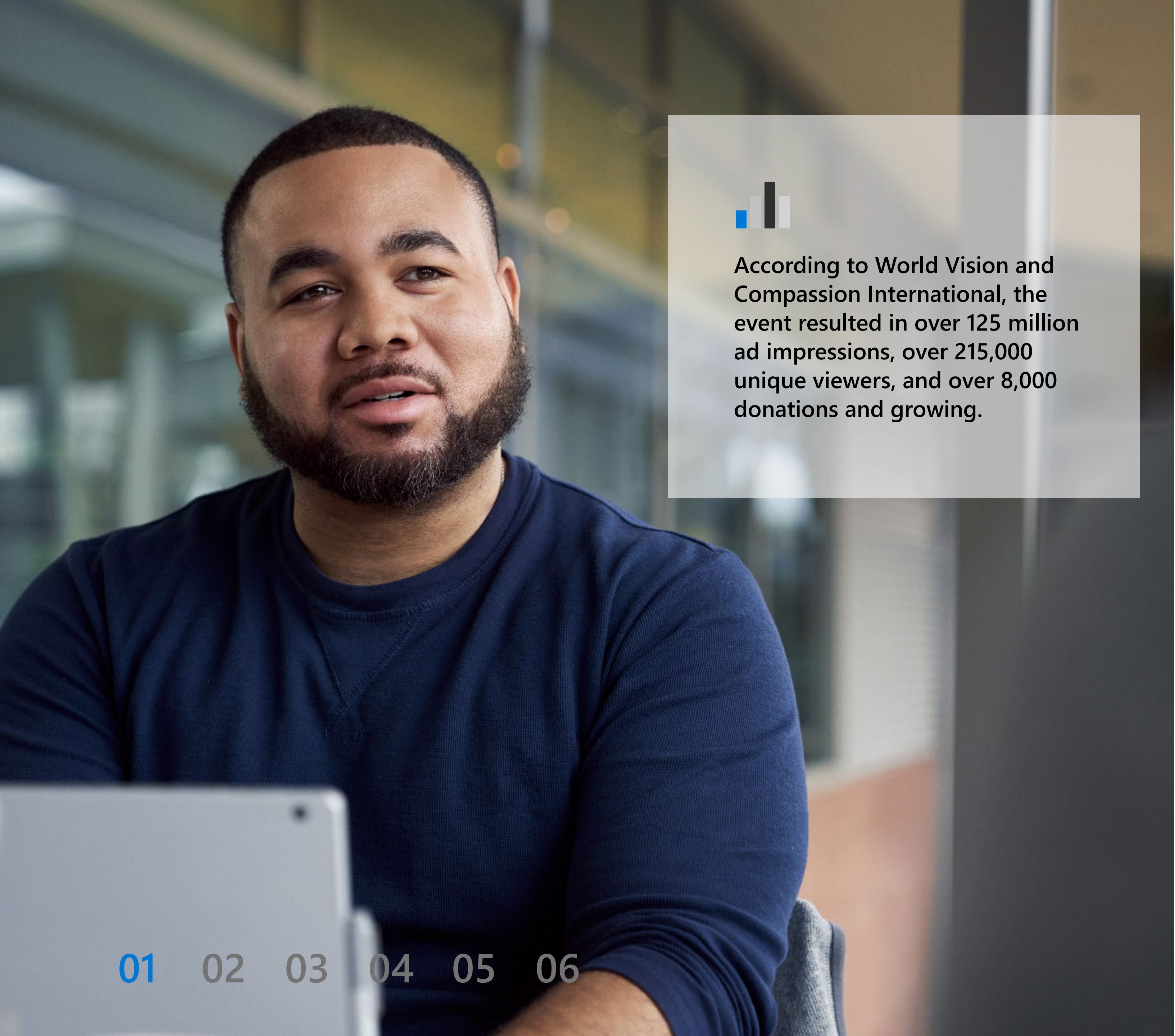


**Virtual events: live and on-demand.** Virtual fundraising events provide a creative way to reach a new audience but still engage your most loyal donors. In fact, you may see an increased response rate and even higher attendance rates due to the convenience of online events, resulting in even more donations for your mission. Take a look at “[Pivoting to digital events to engage donors, beneficiaries and staff](#)” for some helpful tips on how to go digital.



**Digital communications to keep donors engaged and informed.** At least **80 percent of donors consider it important to know the real outcomes** of their charitable donations or volunteer work with nonprofit organizations.<sup>2</sup> If online meetings are not an option, find creative ways through videos, photos, and email to help your loyal donors get closer to the constituents and programs they fund. Share program impact results on a more regular basis and at a lower cost using digital channels. Don’t wait for a once-a-year annual report; deliver fundraising results in real-time.





According to World Vision and Compassion International, the event resulted in over 125 million ad impressions, over 215,000 unique viewers, and over 8,000 donations and growing.

Customer spotlight

# World Vision, Compassion International, Food for the Hungry

In August 2020, world humanitarian organizations World Vision, Food for the Hungry, and Compassion International united around a common mission to raise donations for those most affected by COVID-19 and other natural disasters. Their digital concert event **“Unite to Fight Poverty”** was a step change from their usual in-person and sometimes competing fundraising events, allowing them to reach new audiences and engage donors in a new way.





**Personalize  
the donor  
experience  
even more**

**Tip 02**

01 02 03 04 05 06







60%

The needs are great around the world and it's important to break through the noise to make your fundraising appeal rise above the rest. One of the most powerful ways to achieve that is by personalizing your interactions with each donor. In a recent survey of donors, **60 percent agreed they would give up to 10 percent more in donations if the experience was more personalized.**<sup>4</sup>



The growing sophistication of online platforms is making it easier to create **communications that are more personalized** to the recipients.

For example, you can use Fundraising and Engagement tools to gain critical insight into potential prospects' giving habits and preferences, organizational affiliations, and much more to create and maintain a comprehensive view of potential donors.



Now with LinkedIn Sales Navigator, you can easily conduct constituent research and engage through embedded communication within Fundraising and Engagement. Easily **enhance prospect research through built-in integration with LinkedIn** to get a better understanding of prospects' interests and experiences, enabling you to tailor your outreach, and increasing your chances of success.

By understanding giving preferences, household information, and more, you can engage donors and prospects at their most receptive times and create micro-targeted campaigns with messages that align more closely with their priorities and preferences.

**This increases the impact of your communications.** It also saves the time and cost of sending repetitive generic appeals. And that maximizes the return on each marketing dollar spent.



Longer term, you can **use this unified constituent data to identify potential major donors early** in the relationship and create custom giving plans to encourage recurring gifts, donor loyalty, and life-long giving.





## Customer spotlight

# Salvation Army Switzerland

Check out how the Salvation Army Switzerland worked with a Microsoft partner to create the BrockyCard app to build strong loyalty among its thrift store customers.

Discover how the app provides insights on where to open new stores, how to better manage its thrift store inventory and supply relevant information to customers and donors.

[Read more >](#)





# Respond to urgent fundraising needs

## Tip 03

01 02 03 04 05 06



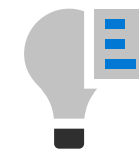




Nonprofits know better than any organizations how quickly unforeseen events can change the demand for their services. During critical fundraising times your staff needs to **be empowered with the right tools to be able to focus on donor connections** rather than have to spend time piecing together data from disconnected systems.



You can **create real-time fundraising campaigns** to very targeted groups for urgent needs. If your staff knows your donors' passions, they can quickly turn to those most likely to respond to a particular need with a targeted and timely ask.



To encourage monthly giving in addition to annual gifts, you can **take advantage of flexible online capabilities** to host multiple micro events throughout the year for specific sets of donors rather than one large gala.



You can quickly **call on data from past successful fundraising efforts** to inform your staff with what works best with each donor group.





## Customer spotlight

# Epilepsy Foundation

Discover how Epilepsy Foundation increased its average donor gifts and overall contributions using a cloud solution based on Dynamics 365.

[Read more >](#)





# Evaluate fundraising efforts in real-time

## Tip 04

01 02 03 04 05 06



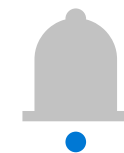




Rather than having to wait until the end of every month, quarter, or even longer to know where you stand financially, you need **a system that gives you an accurate picture of fundraising success and financial outcomes in real-time.**



Fundraising and Engagement provides fundraisers and financial managers with a common donation, revenue, and transaction management and data schema that aggregates revenue and expense transactions. You'll have **greater visibility into program sustainability and financial transparency** and eliminate the need for complex manual fundraising and financial reconciliation at the end of the month.



**A real-time view of your cash flow and working capital** can alert you to potential shortfalls ahead of time so you can take measures to up your fundraising efforts. It also provides immediate information about which fundraising efforts are producing the best results so you can make midstream corrections or apply what is working best to other projects.



You will also be able to see the ratio of administrative versus program delivery costs in real time and be able to **measure impact per dollar spent**. You can communicate those results to funders so they see the impact of their donations.





## Customer spotlight

# Right To Play

See how Fundraising and Engagement is helping Right To Play scale their monthly donor program and expand into additional countries, and reach more children in need.

[Watch the video >](#)



**RIGHT TO PLAY**



Be as efficient  
as possible with  
donor dollars

Tip 05

01 02 03 04 05 06





 **93%**

Donors want their donations to go to programs that they believe in. Nonprofits will always have operational costs so they need to find ways to increase efficiency.

One way to do that is through technology. In fact, according to the “Beyond overhead” whitepaper, **93 percent of funding decision makers now see technology expenditures as an investment toward impact.** Some of the ways Fundraising and Engagement helps you do that is by:



**Unifying fundraising and marketing data** and connecting business processes so you can manage giving prospects more effectively across the entire donor journey.



**Automating routine, repetitive tasks** such as processing recurring gifts and donor commitments, membership renewals, receipt creation, and routing and escalating constituent requests to free up staff time and increase constituent lifetime value.



**Providing the insight** to effectively target and increase the number of prospective, recurring, and major gift donors and attract new constituents.

These measures will help you reduce operating costs, increase fundraising ROI, and increase staff productivity, which will increase the impact of each donation. In fact, it is estimated that **every 5 percent increase in the effectiveness of the NGO sector translates into \$2 billion of enhancements in annual global impact.**<sup>5</sup>

[Read the full “Beyond overhead” whitepaper here. >](#)



**Demonstrate  
impact on an  
ongoing basis**

**Tip 06**

01 02 03 04 05 06





 **77%**

With the speed of change today, most nonprofits cannot afford to wait for the annual report to be published to talk about impact with potential donors.

According to the "[Beyond overhead](#)" whitepaper, **77 percent of supporters and 81 percent of funding decision-makers expect nonprofits to be more effective in achieving goals and advancing causes they work for today.**



**Grant makers, corporate donors, and individuals considering large gifts want to know what is happening now.** What results are you producing from the dollars you spent last month or last quarter? What is the long-term impact? And how are you adjusting to increase that impact?



By using Fundraising and Engagement to integrate fundraising, financial, operational, and programmatic impact **you can easily correlate program service delivery to financial data.**



**This increases transparency and makes it easier to inform those key funder audiences how each dollar is driving a specific outcome.** This allows them to see how their dollars are having an impact on the mission and makes them feel like an included and empowered stakeholder in the cause.<sup>6</sup>





# Learn more about Fundraising and Engagement



Read the latest [blog announcement](#)



Learn key features in the [Overview](#)



Watch a [Demo Video](#)



Click through common scenarios in the [Guided Tour](#)



Explore for 15 days within a [Test Drive Environment](#)



Watch the [Right To Play Customer Video](#)



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