Not-for-Profits Can Do More by Harnessing AI

Microsoft Copilot for Microsoft 365 combines the power of AI and your Microsoft 365 apps to give you the most powerful productivity tool.

Harness AI to deliver greater impact within your Not-for-Profit

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Not-for-profits (NFPs) everywhere are feeling pressure. To provide more community support, to write compelling grant proposals, and reach more donors, all while reducing costs and resources.

To tackle these mounting needs we look to technology to help us meet the challenge. Copilot for Microsoft 365 combines the power of AI and Microsoft 365 apps to turn your words into the most powerful productivity tool on the planet. And Copilot for Microsoft 365 can do so in a safe manner, operating within the security and privacy frameworks of your NFP. Because Copilot for Microsoft 365 is integrated into the apps you already use every day, we can help you jumpstart your Copilot for Microsoft 365 adoption with clear steps.

Imagine accomplishing so much more.

- Increase productivity and reduce repetitive work.
- Make it easier to access information.
- Increase cost savings.
- Access AI-powered data analytics to improve the way you visualise and analyse data to support better decision-making.

While the not-for-profit space is eager to start the AI journey, it's important to be thoroughly prepared. A key first step is understanding current technical readiness and potential risks so your organisation can be proactive in creating an environment of trust for your customers, donors, vendors, and employees. We can help you establish the right guardrails to secure your organization.

Return on investment

Cost savings

Cost avoidance

Wellbeing

Talent retention

Business process improvements

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89%

of participants said they would miss Copilot for Microsoft 365 if they no longer had access to it

97%

of participants said that Copilot for Microsoft 365 has saved them time

Copilot for Microsoft 365 can be a game-changer for NFPs by enhancing productivity and streamlining operations. These use cases illustrate how Copilot for Microsoft 365 can empower NFPs to work smarter and focus more on driving mission outcomes.

1. Content Creation: Generate personalised messages for donors and volunteers, write compelling grant proposals, and maintain an active online presence with generated images and content.
2. Productivity Enhancement: Increase the productivity of staff and volunteers by being more engaged in meetings, quickly catching up.
3. Data Visualisation and Analysis: Utilize AI to visualise and analyse data in Microsoft Excel, turning complex data sets into actionable insights.
4. Email Management: Improve efficiency by managing emails in Outlook, prioritising important communications and organising the inbox.
5. Document Creation: Speed up the creation of effective documents in Word with suggestions for content improvements and formatting options.
6. Custom Solutions: Build custom AI solutions with Microsoft Copilot Studio, such as support chatbots for customer service or tailored data analytics tools for specialised needs.
7. Training and Learning: Access training resources and learning modules to better understand and utilise Copilot for Microsoft 365 capabilities within your organisation.

We can help your NFP plan a clear and effective AI journey to adopt Copilot for Microsoft 365 with a structured yet tailored approach:

- Identify technical readiness
- Assess risk factors and recommend fixes
- Create an implementation plan
- Prepare and train your team for adoption

Findings are based on self-reported estimates from the Copilot for Microsoft 365 value survey submitted.

Meetings

69% quality of meetings were better

88% quicker to summarise a meeting

83% easier to take action after a meeting

Finding information

72% searching for information is easier

58% can find information from multiple sources faster

47% quality of their search results are better

Document creation

75% could draft documents faster

63% can complete a document quicker

56% overall quality of the document was better

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Start your AI journey with a thorough assessment of your technical landscape

Assessment
Define scope and identify business stakeholders

Gather information on key business scenarios

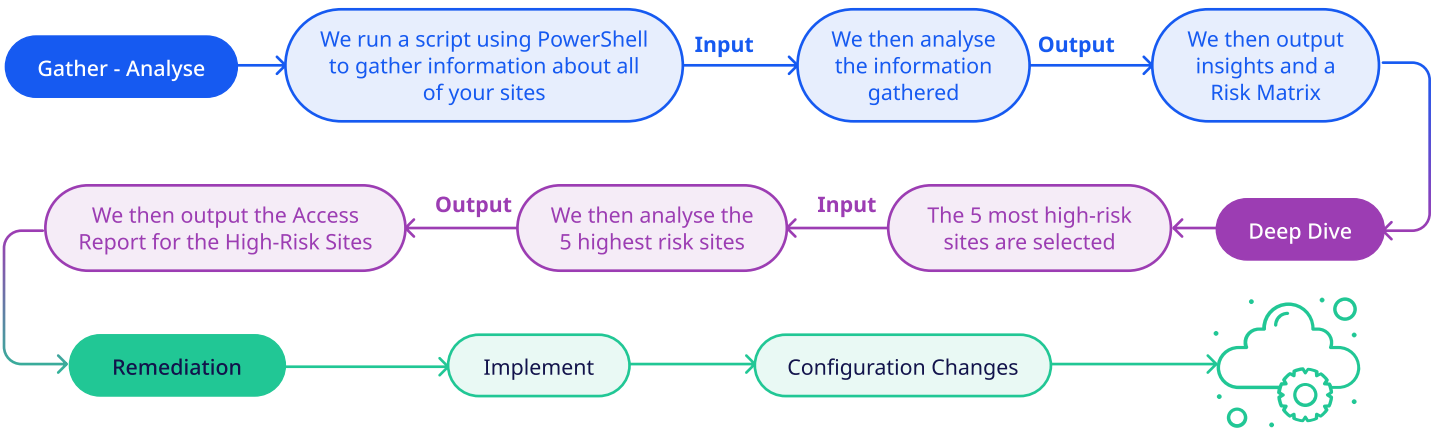Complete and review readiness assessment and guidance

Art of the possible
Showcase the intelligence added to employee experiences with Copilot for Microsoft 365

Explore how you can boost creativity, unlock productivity, and spend more time on work

Build the plan
Develop a plan to implement recommendations based on prioritised scenarios

Define next steps and timeline to develop and implement Copilot for Microsoft 365

Information security assessment approach

Gather - Analyse → We run a script using PowerShell to gather information about all of your sites → **Input** → We then analyse the information gathered → **Output** → We then output insights and a Risk Matrix

We then output the Access Report for the High-Risk Sites ← **Output** ← We then analyse the 5 highest risk sites ← **Input** ← The 5 most high-risk sites are selected ← Deep Dive

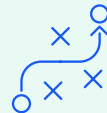Remediation → Implement → Configuration Changes →

Expected outcomes:

Prioritised business scenarios that can be addressed by deploying Copilot for Microsoft 365.

Recommended activities to help prepare your people and technical environment.

A roadmap outlining potential workstreams and dependencies with clear next steps.

Microsoft Copilot for Microsoft 365 helps not-for-profit healthcare provider reclaim employee time to focus on their mission

A large government organisation with a diverse workforce of over 20,000 employees was keen to explore the possibilities of Copilot for Microsoft 365. The client wanted to understand the benefits of Copilot for Microsoft 365 and how it could assist their employees focus on clients by completing more repetitive work within the Microsoft 365 tools they used daily. With an increasing strain on resources and the expectation to deliver, staff are often asked to "do more with less."

Challenges included:

- Difficulty finding relevant information and content across different platforms, channels, and tools
- Time-consuming and manual processes for creating and sharing documents, presentations, and meeting notes
- Low engagement and innovation with repetitive tasks

The client was curious to explore how AI could help them address the challenges and improve their employee productivity, creativity, and skilling. In particular, the department was excited to learn more about the ability to provide personalised assistance to users across Microsoft 365 applications including Microsoft Teams, Outlook, Word, PowerPoint, Excel, and Microsoft Loop.

Our approach

Engage Squared ran a two-phase Copilot for Microsoft 365 adoption approach.

1

Phase one: Prepare for Copilot for Microsoft 365

We focused on understanding how people worked, identifying opportunities to leverage Copilot for Microsoft 365, and building a business case for a wider roll out. We conducted an information management risk assessment.

2

Phase two: Copilot for Microsoft 365 launch to 150 employees

We helped prepare for launch and sustainment activities focusing on a communications campaign, training, and deeper support for the pilot community.

The result

Expectations were high for Copilot for Microsoft 365. We are excited and proud to have demonstrated the possibilities and showcase the positive impact on employee productivity, efficiency, and increasing Microsoft 365 ROI. The client now plans to expand Copilot for Microsoft 365, working with Engage Squared to continue their successful Copilot for Microsoft 365 launch.

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Overwhelmingly positive response from users and stakeholders who used Copilot for Microsoft 365:

Better smarter meetings

Take minutes, summarise next steps and list actions from all your meetings.

88% it's quicker to summarise a meeting

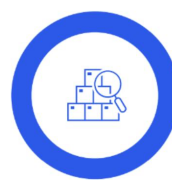**83%** it's easier to take actions after a meeting

Creating content

Get to a draft quickly so you can spend time refining your content.

Avoid privacy risks imposed by shadow IT by providing a managed LLM tool for staff to use.

75% could get to a first draft quicker

Finding information

Quickly find what you need by searching across multiple sources, platforms, and tools

72% could find information easier

Key impact

- Increased awareness and confidence in using Microsoft 365 tools and features.

- Enhanced creativity and innovation - Copilot for Microsoft 365 helped users generate new ideas and suggestions and has allowed them to create engaging and informative content.

- Improved skilling and learning - Copilot for Microsoft 365 helped users learn new skills and capabilities, and access relevant resources and training materials.

- Improved productivity and efficiency - Copilot for Microsoft 365 helped users save on average 10hrs per month per user (based on self-reported survey data from pilot participants) this equates to an average time saving of 125hrs per user per year.

- Increased user satisfaction and engagement - Copilot for Microsoft 365 provided a positive and interactive user experience, and a supportive and collaborative community within the department.

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Working alongside you, Engage Squared can help your NFP unleash creativity, unlock productivity, and uplift skills with Copilot for Microsoft 365. Your journey starts with leadership understanding.

Get started with our Boardroom Briefing, a tailored 30–90-minute session to help your Board of Directors understand the opportunities and risks posed by AI

We are Engage Squared

Our mission is to make work better. We empower employees to enjoy work more - using Microsoft tools to make work more productive, collaborative, and connected.

We work with large organisations to:

- Enable teams and individuals to adopt new ways of working through our organisational change and transformation campaigns;
- Help leaders, communications, and HR teams to uplift culture and engage staff by building integrated digital workplaces that use the latest features in SharePoint Online and the Microsoft Viva suite;
- Create a more secure and compliant environment to better manage, retain, and protect their information landscape;
- Enhance business operations by using AI, workflows, and Microsoft Power Platform, to speed up processes and reduce administration; and
- Have a greater impact on the community by using the latest and greatest features in Microsoft 365.

We take partnerships seriously and are proud to be named Microsoft's Australian Partner of the Year in 2021, to have won Microsoft's Global Employee Experience Partner of the Year Award in 2022, and to have been a finalist for Microsoft's Global Modern Workplace for Frontline Workers Award category in 2021.

Get started with our Boardroom Briefing

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Visit our website for more info