



HELPING YOU
enhance your community,
one relationship at a time.



Microsoft Dynamics CRM

Supporting your cause with affordable, versatile constituent management.



Develop insight; intensify passion.

KNOW YOUR CONSTITUENTS

Your service relies on support from a variety of contributors—and you need to make the most of donations and time. You also need to keep your contributors connected and informed, yet not overwhelmed with multiple, disparate contacts. Bring together all your constituent information into one place with a familiar interface accessible online to everyone in your organization. Microsoft Dynamics CRM Online for not-for-profit organizations also has built-in tools to help you nurture different types of relationships.

For example, when a donor makes an annual contribution, the solution will automatically send a thank you e-mail and set up an alert to notify you when it is time to contact the donor again. Microsoft Dynamics CRM can be used to track important information about other constituents, too, including in-kind contributors, volunteers, clients, members, and beneficiaries.

"The CRM system is comprehensive and flexible. Thank you, Microsoft! We could not have achieved the financial diversity and sustainability for Kinship House without [it]."

Ann Witsil, Executive Director
Kinship House
Giving foster kids hope!

AUTOMATE CASE MANAGEMENT

Gain efficiencies in coordinated health and social services with a unified view of each client across multiple programs. You can improve case management with Microsoft Dynamics CRM by connecting a variety of systems in one centralized repository, and by automating processes.

Track data in real time to better assess the effectiveness of care, and manage follow-up activities. Use convenient scheduling tools that are fully integrated with Microsoft Office Outlook. Set up automated reminders for follow-up activities. Enable case workers to easily upload case information while they are in the field.

TRACK ALL TYPES OF DATA

Consolidate all your essential information into one versatile environment. Through simple point-and-click customization, Microsoft Dynamics CRM is easily designed to handle donation and pledge management, volunteer tracking, and marketing campaigns, as well as constituent management and case management. It's also simple to scale the solution as your organization grows, and adjust the scope of case management records as the need arises.

The affordable constituent and data management solution is simple to use, with an Outlook-based interface that brings together pertinent information from various sources into one familiar environment.

"It is wonderful to be able to walk into a nonprofit organization and see the staff's eyes light up when they see the functionality this package provides, that the solution is affordable, and can be up and running in a fraction of the time that they have experienced with other systems. It is even more rewarding to see the smile on a director's face as she begins to discover that she can now manage her relationships proactively and communicate to her board reliable and useful information."

Shawn C. Michael, Director
NPower Oregon

STRETCH YOUR REACH WITHOUT STRAINING YOUR BUDGET

Get more done, more cost-efficiently, with ready-to-use and customizable tools. Microsoft Dynamics CRM Online for non-for-profit organizations enables:

- Donation and pledge management
- Basic membership management
- Basic volunteer tracking
- Campaign management
- Event management
- Case management
- Excel® dashboard reports
- Online donations through a payment gateway

The simple per-user, per-month pricing plan fits any size organization—and even scales for seasonal needs. The subscription also includes the latest functionality through regular releases and updates at no incremental cost.

Simplify essential record-keeping.

IMPROVE INFORMATION SHARING

Repeat successful campaigns—without duplicating the work. Your staff and volunteers can save time and money by sharing information and work that has already been done. Refresh and repurpose effective campaigns, marketing, and service materials rather than recreating new ones, so you have more time to dedicate to meaningful activities.

Sharing constituent profiles across the organization can help you target communications and avoid redundant contact. The secure online solution enables contributors to collaborate across the organization from anywhere. True offline synchronization enables you to work with data offline, then automatically update changes the next time you connect.

"We are excited about its capabilities to help us integrate and synthesize program-related data as well as further enhancing our ability to monitor and track program outcomes—something all donors care about deeply."

Elizbeth Nye, Executive Director
girls inc.



Invest your time where it counts.

AUTOMATE AND STREAMLINE PROCESSES

Establish an organization that can continue vital services long into the future. Microsoft Dynamics CRM can help your organization clarify complex management processes to enhance long-term sustainability.

The solution helps you identify best practices and create consistent procedures that save time; streamline record-keeping through automation and data tracking for accounting, tax, and reporting compliance; and generate reports quickly with ready-to-use templates.

You can get a quick view into data that informs good decisions. The home page puts key information at your fingertips, the Reporting Wizard helps you quickly create custom reports to track progress and opportunities, and the Microsoft solution works seamlessly with Microsoft Office products, including Word and Excel. Using a familiar interface eliminates the need for training and frees up your time to focus on the people and activities that make a difference.

REDUCE IT COMPLEXITY

Your service organization is unique, and it's easy to tailor Microsoft Dynamics CRM to your needs. Its graphical user interface makes it simple to select the right fields from 200 custom objects to create the perfect solution for your needs. Yet, its ready-to-use functionality means you can use it immediately.

The robust capabilities of Microsoft Dynamics CRM may sound technical and complex, but you don't need an IT expert to deploy or maintain this solution. And because Microsoft hosts the solution and your online database, it is protected by the latest security technology and backup systems. Your constituent, case, and project data is secure and your staff's productivity is maintained even in an emergency.

