



**How charities can leverage Copilot  
across the Microsoft Dynamics  
ecosystem**

Charity Digital AI Summit

Thursday 17 October

# Your mhance Team Today



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Who is mhance?

# Who we are



## History

Nov 2011: mhance Formed

2024: 85% Projects in Nonprofit

2011: First D365 Project; Oxfam Ireland

Employees: 127  
(No Contractors, No offshore)



## Partnership

TSI Managed Account since 2017

Invited to represent MS at Sector Events

Long term, trusted & mutually beneficial partnership - clients

FRU, Dotdigital, MHR



## Ethos

We believe in being open, honest & transparent

We focus on People, Processes & Data

We are pragmatic & innovative

Project success is 80% People, 20% Software



## Experience

Awarded Microsoft Nonprofit of the Year 2023/24

200+ Projects in Nonprofit Sector

Passionate consultants & deep sector knowledge

Proud of our References & Case Studies



## Success

Projects are Objective & Data Driven

Dedicated Data Management Team

Only engage on projects that can be delivered successfully

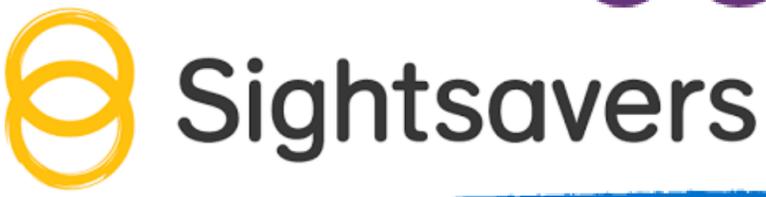
Focus on efficiencies, benefits, change & fun!



Experience



sense



OXFAM  
Ireland

LIFE CHANGING  
DEVOTION

saving the lives  
of people with  
blood cancer



RNIB



BROOKE  
ACTION FOR WORKING  
HORSES AND DONKEYS

See differently

DementiaUK

SEE ABILITY

CONCERN  
worldwide

CAF CROHN'S &  
COLITIS UK



DiABETES UK  
KNOW DIABETES. FIGHT DIABETES.



THAMES VALLEY  
AIR AMBULANCE

CHARITY  
FOR CIVIL  
SERVANTS

# Copilot



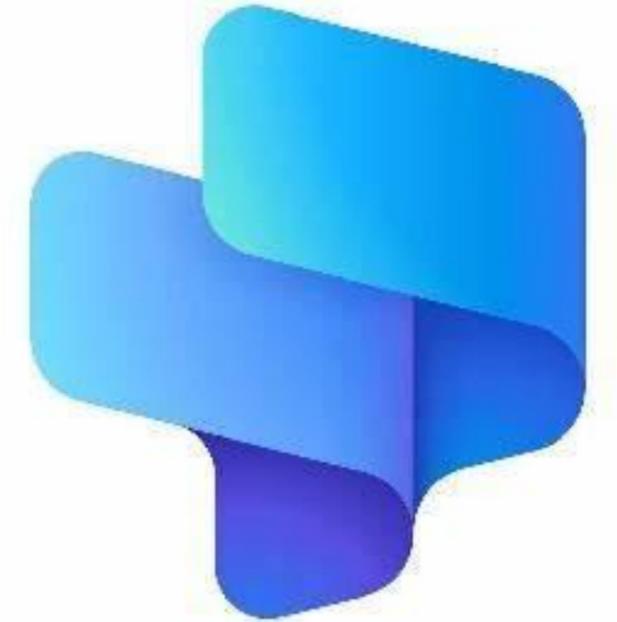
## **Copilot**

Your everyday, AI companion, Web, mobile, windows and is free!



## **Microsoft 365**

Your Copilot for work.  
Microsoft 365 Apps  
Business Chat (Teams)



## **Copilot Studio**

Build your own Copilot  
Extend first party  
Copilots



Sales Copilot

- **Enhanced Donor Engagement:** Copilot helps create personalised and engaging content, such as thank-you emails and campaign updates, which can strengthen relationships with donors
- **Efficient Communication Management:** With intelligent email management, Copilot ensures timely and effective outreach, helping fundraisers stay organised and responsive
- **Automated Content Creation:** Copilot can generate compelling marketing materials and grant proposals, saving time and ensuring consistency in messaging
- **Data-Driven Insights:** The integration with Microsoft Cloud for Nonprofit provides fundraisers with powerful data analytics tools to attract, retain, and grow their donor base
- **Productivity Boost:** Features like real-time transcription and summarisation of meetings allow fundraisers to focus on strategic tasks rather than administrative ones



Service Copilot

- **Streamlined Communication:** Copilot can help draft and manage responses to common inquiries, ensuring timely and consistent communication with donors and beneficiaries
- **Efficient Task Management:** By automating routine tasks such as scheduling meetings, setting reminders, and summarising conversations, Copilot allows service desk staff to focus on more complex issues
- **Data Insights:** Copilot can analyse data from various sources to provide actionable insights, helping staff make informed decisions and improve service delivery
- **Personalised Support:** With AI-driven recommendations, Copilot can assist in tailoring responses and support to individual needs, enhancing the overall experience for those seeking help



Marketing Copilot

- **Personalised Donor Engagement:** Copilot can help create tailored communication for donors, such as personalised thank-you notes, updates on how their contributions are making a difference, and invitations to events. This helps build stronger relationships and encourages continued support
- **Efficient Campaign Management:** By automating routine tasks like scheduling, follow-ups, and data entry, Copilot allows fundraisers to focus more on strategy and less on administrative work.
- **Insightful Analytics:** Copilot can analyse donor data to provide insights into giving patterns and preferences. This information can be used to tailor fundraising strategies and identify potential major donors.
- **Compelling Content Creation:** Whether it's drafting grant proposals, creating social media posts, or developing campaign materials, Copilot can generate high-quality content quickly and consistently.
- **Enhanced Collaboration:** Copilot facilitates better communication and collaboration within fundraising teams and with other departments, ensuring everyone is aligned and working towards



Copilot Maker

## **App Maker:**

- Assists in creating the apps you need from scratch.
- Enhances and extends existing applications.
- Simplifies app-building with AI-powered suggestions and tools.

## **Flow Maker:**

- Helps automate workflows by providing pre-built flow templates.
- Suggests foundational blocks to jumpstart your flow creation.
- Eliminates the need to start from a blank canvas when building workflows.



Copilot Studio

- **Custom AI Assistants:** Charities can create AI assistants tailored to their specific needs, such as helping volunteers find resources quickly or responding to inquiries in real-time on their websites
- **Enhanced Productivity:** By automating routine tasks like document summarisation, presentation creation, and email drafting, Copilot Studio allows staff and volunteers to focus on more impactful activities
- **Data Visualisation and Analysis:** Copilot Studio helps charities visualise and analyse their data more effectively, leading to better decision-making and more impactful strategies
- **Streamlined Fundraising Efforts:** With tools to generate personalised donor communications and compelling grant proposals, Copilot Studio can enhance fundraising campaigns and improve donor engagement



Summary

# Summary

- Copilot can drive operational efficiency for Charities
- Copilot will leverage Data to enhance Fundraising and Stakeholder Engagement
- Copilot is seamlessly embedded with Dynamics 365 for Charities



**Thanks for Listening!**

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