

BROCHURE

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Microsoft Dynamics 365 CRM / Upbeat

Charity and Not-for-Profit Organisations



Today's not-for-profit organisations operate in a highly competitive environment. Competition for donors, supporters, volunteers, sponsorships and trusts is fiercer than ever, and only the organisations most skilled at connecting with and managing those target groups can expect to thrive.

There is also the challenge of managing staff, keeping overheads low and ensuring that limited financial resources are directed to where they're needed most.

The Microsoft Dynamics 365 – CRM / Upbeat business management solution meets these challenges. Developed specifically for the charity and not-for-profit sector, this solution platform provides a comprehensive suite of tools to automate business processes across your entire organisation.

Improved productivity, enhanced efficiency, streamlined operations and, ultimately, a healthier bottom line are some of the many benefits charities and not-for-profit organisations are experiencing from their use of Microsoft Dynamics 365 – CRM / Upbeat.

Providing a 360 degree view of your organisation and its constituents, managing a wide range of business processes and activities including:

- Donations
- Fundraising
- Sponsorship
- Memberships
- Volunteers
- Financials
- Grants
- Education
- Client services
- Marketing
- Events
- Ticketing
- Data analysis... and plenty more.

MANAGEMENT FOR FUNDRAISING AND DONATIONS

If you would like to grow your donor and supporter base, improve the results of your fundraising efforts and retain donors for the long term, Upbeat is the ideal solution.

With the majority of charities and not-for-profits unable to maintain donor retention rates above 50%, what organisations require is a technology solution that provides a deep and comprehensive view of the supporter base. Using Upbeat, you can easily produce donor retention reports and execute strategies to improve your engagement with supporters, retain donors, reactivate lapsed donors and attract larger donations.

Upbeat captures every interaction you have with your donors, telling you what is working best and what isn't. Donations, merchandise purchased, events attended etc are all captured in Upbeat. The system creates a unique history for each donor, supporter and volunteer, providing you with the business intelligence you need to

comprehensively analyse your activities, connect with your constituents and plan for the future.

Communicating with those you need to connect with is also greatly improved with Upbeat. The solution automates your communications with donors and volunteers, from general correspondence through to 'thank you' notes and reminder notices. By automating such tasks, Upbeat eases the burden on your admin staff and allows for improved targeting of your messages.

MARKETING TO DONORS AND SPONSORS

Use Upbeat to develop closer and longer lasting relationships with your donors. Upbeat supports an unlimited number of donor classes and automates the delivery of donation drives, campaigns and special promotions. For example, the system makes it easy for you to reward recurring gift givers, acknowledge major gifts and donations and offer prioritised invitations to events. Upbeat makes it easy to give top-tier contributors the recognition they deserve.





Upbeat also makes it easy to identify those individuals and groups who are most likely to engage with your organisation. When preparing prospect lists for donation drives you'll have all the information you need to maximise results. Correspondence such as diary alerts, invitations, email responses and booking information are fully automated, enabling you to effectively and efficiently manage your constituents.

GROW YOUR EXTENDED FAMILY

You can use Upbeat to enhance relationships with, and meet your obligations to, board members, sponsors, governing bodies and regulatory authorities.

For these stakeholders, Upbeat provides easy to use reporting and analytics tools that allow you to demonstrate value. Information on event attendance levels, funds raised, media coverage generated and other key metrics can all be easily produced and analysed.

With Upbeat, you gain a better understanding of your key stakeholders, their preferences and interests, and this in turn helps you target, and communicate with, the right people in the right way.



With Upbeat, we have focused on the areas of critical importance to charity and not for profit organisations. These include the integration of fundraising, donor and event management functionality with core financial, marketing, event management and service delivery systems. Upbeat is designed to improve fundraising outcomes and help your organisation serve its mission.

FINANCE MANAGEMENT

As the trusted custodians of public funds, charities and NFPs are obligated to make sound financial management a top priority. Upbeat ensures full compliance with all accounting regulations while enabling you to demonstrate that your financial resources are being properly allocated.

Upbeat includes powerful 'moves management' and fundraising management functionality, including annual funds, major gifts, planned giving, payments and recurring gifts. It also automates many everyday tasks, thereby reducing administrative overheads.

INTEGRATED FOR A COMPLETE PICTURE

To keep the various moving parts of your organisation operating effectively, system integration is key.

Using Upbeat, processes around donations, bequests, fundraising, events, marketing, sponsorships and client services are all integrated to provide you with a complete picture of your organisation's operations.

Transactions and payments are immediately reflected in your organisation's overall financial picture, enabling managers and administrators to know your organisation's financial position at any given time. Tight integration with core business systems also ensures that all financial transactions are automatically and transparently recorded. The result is a solution that delivers greater financial visibility, flexibility and control.

BUILT FROM EXPERIENCE

With any IT solution deployment, you need to have confidence in the partner you've chosen.

For more than 25 years Professional Advantage has been deploying business management solutions for organisations of all shapes and sizes and from a wide range of industries. During that time we have developed a full understanding of the challenges faced by charity, not for profit and related organisations.

Our approach is to work alongside you, our customer, to assess your requirements and roll out an Upbeat solution that meets both your current and future needs.

For more information

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About Professional Advantage

Professional Advantage is an international IT consulting and solutions company, with 30 years of experience in helping organisations achieve more by improving their business systems through industry leading software solutions. Originating in Australia, it is one of the country's most awarded solutions providers. The 250-strong team covers seven offices across three continents, and has successfully worked with over 1000 organisations.