

Nine Steps to Optimize your Fundraising and Marketing Campaigns with AI



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Improve campaign management with AI

Why would you consider artificial intelligence (AI) in your management of fundraising and marketing campaigns? When everybody in your organization is working as hard as they can and resources are stretched thin, AI can free up team members' attention and energy so they can stay focused on your mission and the goals of the campaigns they're working on.

Staffing shortages and team member burnout can make it challenging to plan and execute campaigns. Givebutter reports that 30 percent of nonprofit employees are burnt out and 20 percent are nearing burnout. The nonprofit sector experiences a high voluntary turnover rate of 19 percent, compared to 12 percent in the overall labor market. Given that in the US, 1 out of every 10 employees works for a nonprofit, that means a large number of mission-oriented, talented people are feeling overworked, with many of them ready to move on.¹

In this guide, we discuss how AI can help you run successful campaigns, even with a lean team. By using AI, you can more easily avoid team burnout, accomplish critical fundraising tasks on time and with greater efficiency, and overcome donor and public-attention fatigue.

Microsoft 365 Copilot is your AI assistant for work, which connects seamlessly to your existing apps and data, understands your work context, and includes enterprise-grade security, privacy, and compliance you can trust. It can give your team time back to work more creatively and with greater impact by assuming a variety of tasks that involve reviewing and processing large volumes of information from multiple sources.

Meet your AI assistant

Microsoft 365 Copilot brings generative AI—the kind of AI that surfaces fresh insights from your information or drafts first versions of new content—to your tasks and workflows. Generative AI is rapidly becoming part of everyday work for nonprofit organizations, businesses, and individuals. In 2023, the adoption of generative AI outpaced that of tablets and smartphones.²

The power of Copilot comes from the large language models (LLMs) built into it. LLMs can process vast amounts of information at lightning speed—unstructured, like words in emails, as well as structured, such as numbers in spreadsheets. For example, LLMs allow Copilot to quickly review past campaign communications and results and then offer suggestions for how to generate greater outcomes or make outreach efforts more compelling. When you look for a creative spark in campaign marketing, Copilot can draw on data and documents in your organization's systems and insights from nonprofit industry experts, websites, and publications to offer innovative suggestions and produce fresh working drafts.

Copilot provides contextual assistance by augmenting the Microsoft apps you already use, so you don't need to learn a new software tool. Copilot in your apps helps you achieve more as you work smarter.

Become familiar with Microsoft Copilot—for free

In this guide, we're showcasing how multiple versions of Copilot work together. We call out the free versions by highlighting them in blue.

Microsoft Copilot can answer your questions, create rough drafts of content and images, and help you understand state-of-the-art campaign management. Experiment with the free version of Microsoft Copilot, the Copilot app, or the preview version of Copilot in Windows on your Windows 11 PC. If you already have a Microsoft 365 license, you get access to the web version of Microsoft Copilot with enterprise data protection.

To learn more, visit Microsoft Copilot – Microsoft Adoption

Paid versions of Copilot:

- [Microsoft 365 Copilot](#) helps you:
 - Take meeting notes and summarize message threads in Microsoft Teams.
 - Create first drafts, edit content, and summarize documents in Word.
 - Develop impactful presentations in PowerPoint.
 - Analyze and visualize data in Excel.
 - Manage your inbox and draft emails quickly in Outlook.
- [Copilot for Dynamics 365](#) streamlines and advances all organizational activities with practical, contextual AI.
- [Microsoft 365 Copilot for Sales](#) supports you in managing and optimizing relationships and transactions with donors, constituents, and the public.
- [Microsoft 365 Copilot for Service](#) elevates the experience quality that your contact center provides.
- [Microsoft 365 Copilot in Power Platform](#) enables greater efficiency, speed, and confidence as you automate processes, create data-driven reports and websites, and build low-code apps.
- [Microsoft Copilot Studio](#) lets you customize Microsoft 365 Copilot to your requirements or build your own copilots.
- [Microsoft Security Copilot](#) detects and mitigates threats before they can cause harm.

Responsible AI practices

Copilot embodies responsible AI practices, which guide all AI innovation and usage at Microsoft. As your nonprofit works with Copilot, you can be assured that fairness, reliability and safety, privacy and security, accountability, transparency, and inclusiveness infuse the solution's data management and everyday operation. Because Copilot is designed and secured for human oversight, your organization always remains in control of its data.

[Learn more about how we empower responsible AI practices.](#)

Strong prompts lead to great results

When you work with a generative AI solution like Copilot, giving it detailed, comprehensive prompt instructions will provide you with useful answers, strong first drafts, and insightful perspectives. Writing effective prompts is not difficult, but it will pay off if you take a little extra time to experiment with prompt writing before you plan and execute a fundraising or marketing campaign.

Start by asking questions or giving simple research assignments, and then rephrase your instructions to see how Copilot presents different results. You can also set "Rewrite" with Microsoft Copilot in Edge to work on your emails, social media posts, or other content. Watch how it sharpens the focus and adjusts the voice and tone of the content to fit your audience and style.

The more precisely you tell Copilot what you want, the more useful it can be.

We recommend that Copilot prompts include these four key components:

- **Goal:** What kind of response are you looking for? Specify if you want a list with a certain number of bullets, a paragraph of verbiage, an email message with a specific word count, or a slide with key points and a graphic.
- **Context:** Why do you need the response from Copilot, and who is involved? You could offer direction like "report in detail to our board regarding the results of the year-end fundraising campaign" or "invite our volunteers to work our booth at the upcoming neighborhood fall festival and get them excited about it."
- **Sources:** Which data sources should Copilot use? It can draw on, for instance, "relevant data from LinkedIn" or external sources like publicly available nonprofit industry magazines or websites. To ensure the responsible and safe use of sources and assets, your organization should define and implement a governance framework for content management, security, and access. In the paid versions like Microsoft 365 Copilot, you can also search your internal institutional data with phrases such as "all emails to volunteers in the last 12 months" or "minutes from last week's board meeting."
- **Expectations:** How should Copilot deliver? You can request nuances, like "concise, action-oriented writing in a conversational tone." You can ask for graphics that include photographic elements from your files or incorporate your logo colors, or a table that presents campaign fundraising results.

You can always accept, disregard, or fine-tune whatever suggestions, findings, content drafts, and designs Copilot offers. Just remember to save your prompts separately if you wish to reuse them. Sample prompts with use cases for campaign management with Copilot are available in the next section.

Practice prompt writing:

Try practice prompts with Microsoft Copilot at copilot.microsoft.com and find out how it can assist with your campaign. You can also visit the [Microsoft Copilot Lab](#) for additional ideas and insights.



Nine steps to optimize the campaign lifecycle

At any stage of your campaign management, you can rely on Copilot across Microsoft solutions to help you and your team members plan for success and achieve the best possible outcomes. On the following pages, we consider how Copilot can contribute to key elements of a fundraising or marketing campaign and share sample prompts you can adapt and refine. These suggestions blend both free and paid versions of Copilot across Microsoft solutions. Free versions are called out in [blue](#).

Accessibility is front and center

How do you ensure the accessibility of your campaign collateral? To ensure the support and participation of your target audiences, as well as current and prospective team members, you need to provide accessible materials. Copilot incorporated accessibility right from its inception. Developing your content so it is comprehensible to all individuals, irrespective of their abilities or preferences, is a crucial component of accessibility. To assist you in this endeavor, Microsoft has created the Accessibility Assistant, a robust tool that can detect and resolve potential problems in your documents, emails, and presentations. You can access the Accessibility Assistant from the Review tab in Word, Outlook, and PowerPoint. For more information on accessibility, visit [Accessibility in Microsoft 365 Core Apps at the Microsoft Community Hub](#).

1. Set measurable, tangible goals

Define the marketing and/or fundraising outcomes you want to achieve. You may think of goals such as raising a certain amount of funds, boosting support from past donors by a certain percentage, gaining contributions from new donors at a targeted proportion to existing supporters, or increasing your number of volunteers. These high-level objectives may require supporting activities with their own measurable goals. For instance, winning new donors may require a timely, targeted marketing and communications effort that needs to be completed by a certain time to benefit your campaign. You can use [Copilot in Power BI](#) or [Copilot for Dynamics 365](#) to pore over data and files from your past campaigns to see what they achieved, how results differed from year to year, and what the likely reasons for these differences are. Copilot findings help you define campaign goals that are achievable and realistic without being needlessly cautious.

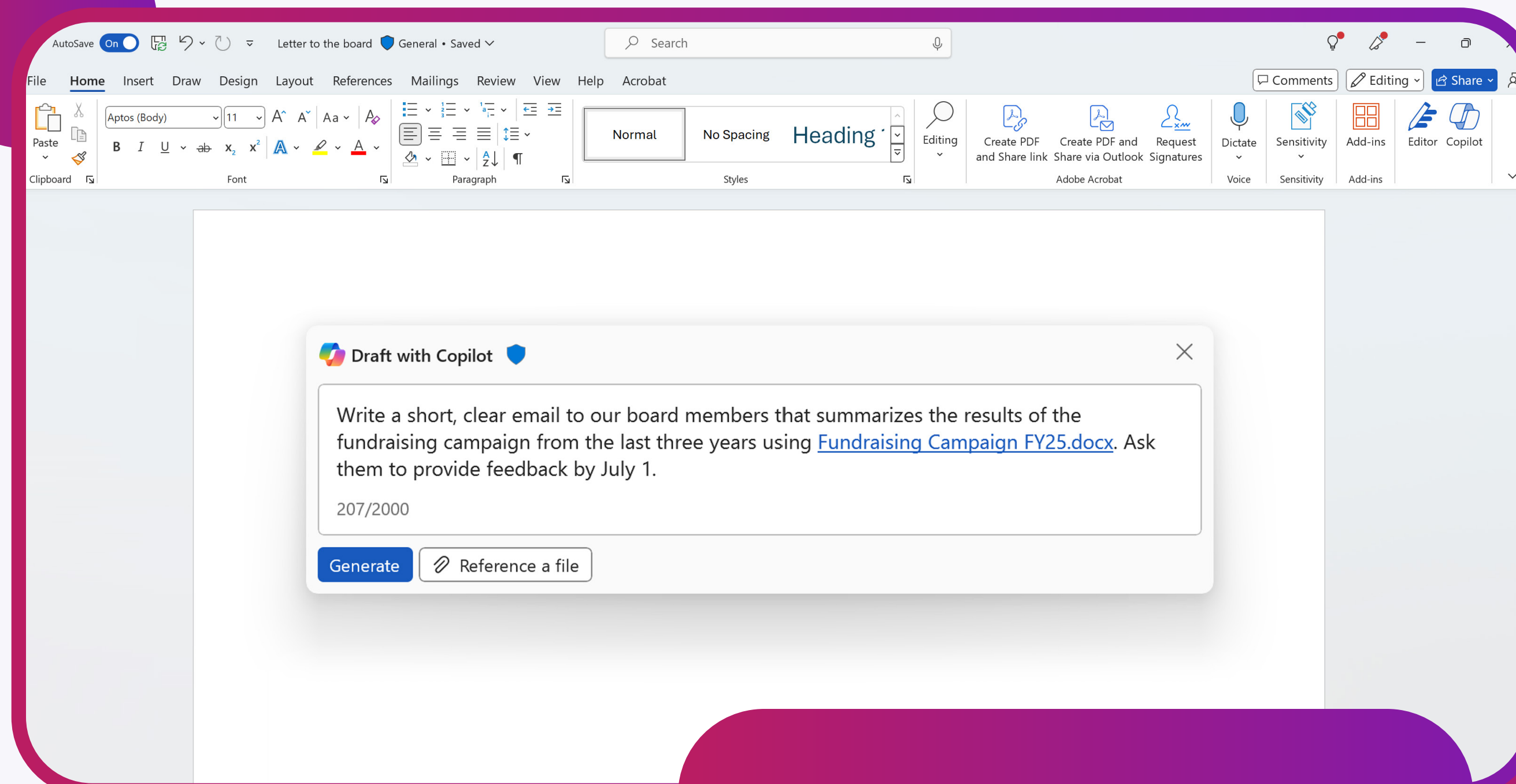
When you collect input from the board and nonprofit leadership regarding campaign objectives, [Microsoft 365 Copilot in Word](#) can collate all requests and recommendations in a working document to ease consensus building. Later, once your campaign's goals and supporting metrics are set, [Microsoft 365 Copilot in Outlook](#) can document them in a memo for the campaign team and organizational stakeholders.

Now, you try! Use these sample prompts to help you envision your campaign.

"Produce a table of our campaigns' performance compared to fundraising goals for every campaign starting in 2020."

[Try Copilot in Power BI](#)

"Write a short, clear email to our board members that summarizes the results of the fundraising campaigns of the last three years using / [fundraising campaigns document]. Ask them to provide feedback by July 1." [Try Microsoft 365 Copilot in Word](#)



Microsoft 365 Copilot in Word

Tip: When giving Copilot instructions, you can direct it to specific work content by using the forward slash key ("/"), then typing the name of a file, person, or meeting. If you write a prompt and don't reference a specific file, person, or meeting, Copilot will determine the best source of data for its response, including all your work content.

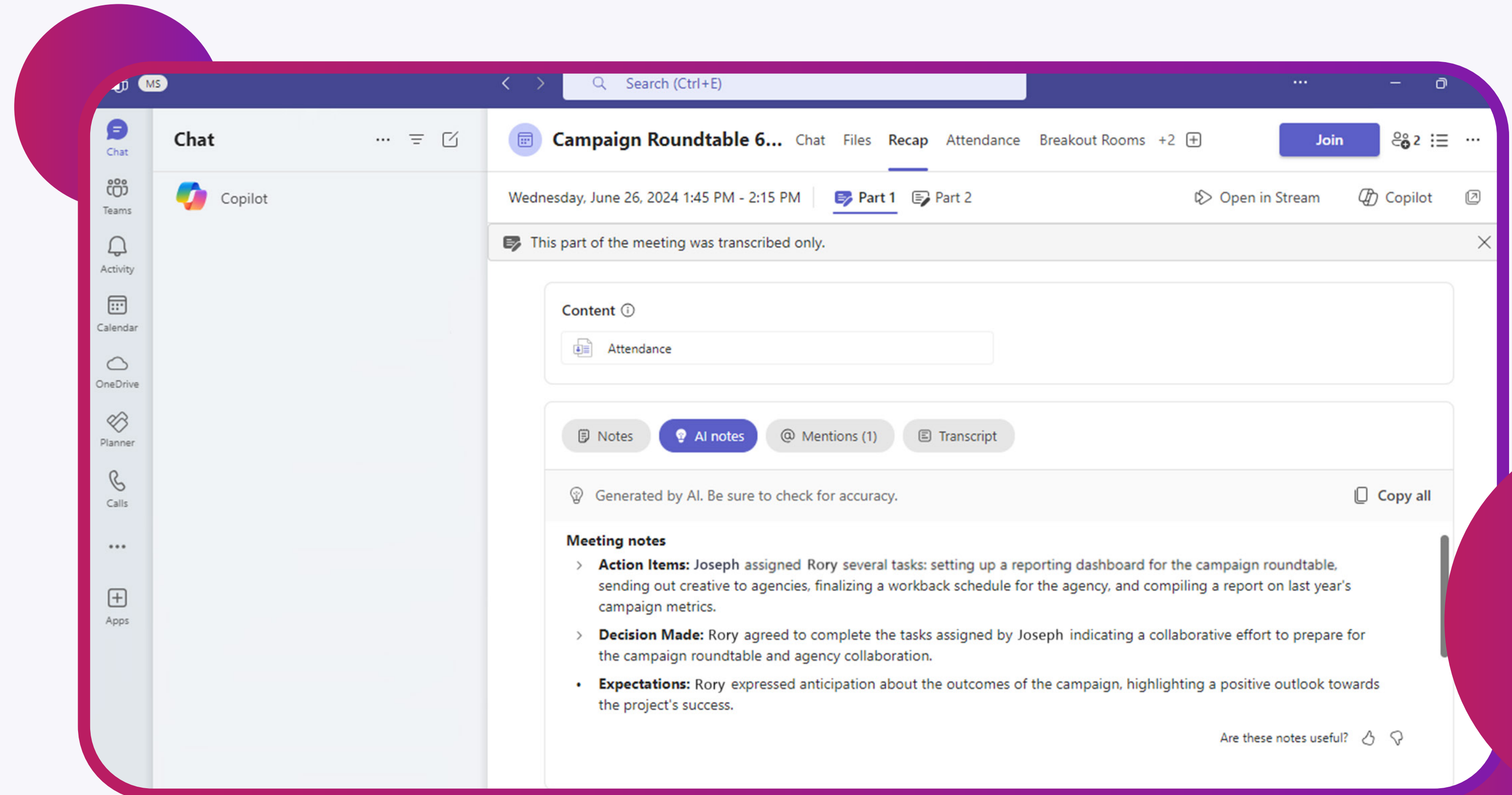
2. Fuel effective collaboration

Many times, team members, volunteers, and consultants who conceive, write, and design campaign materials need to collaborate and align, but they have clashing schedules or are in different time zones. When collaborators meet through Microsoft Teams, [Microsoft 365 Copilot in Microsoft Teams](#) makes it easy to catch up for those who couldn't join a conversation and have not seen the latest drafts and ideas. It can provide them with highlights of conversations, action items, and the most current versions of written materials and design treatments. That way, campaign creatives can stay on track and in sync to produce the required collateral.

Now, you try!

"Summarize the main points and tell me the next steps agreed on during the meeting called 'campaign roundtable 6-26.'" [Try Microsoft 365 Copilot in Microsoft Teams](#)

"Tell me what participation was like during the meeting called '[campaign roundtable 6-26-24]'. Which event planning ideas offered by the participants were not discussed at all? What was the tone of the meeting—was it collegial, enthusiastic, energetic, positive, constructive, or something else?" [Try Microsoft 365 Copilot in Microsoft Teams](#)



Microsoft 365 Copilot in Microsoft Teams

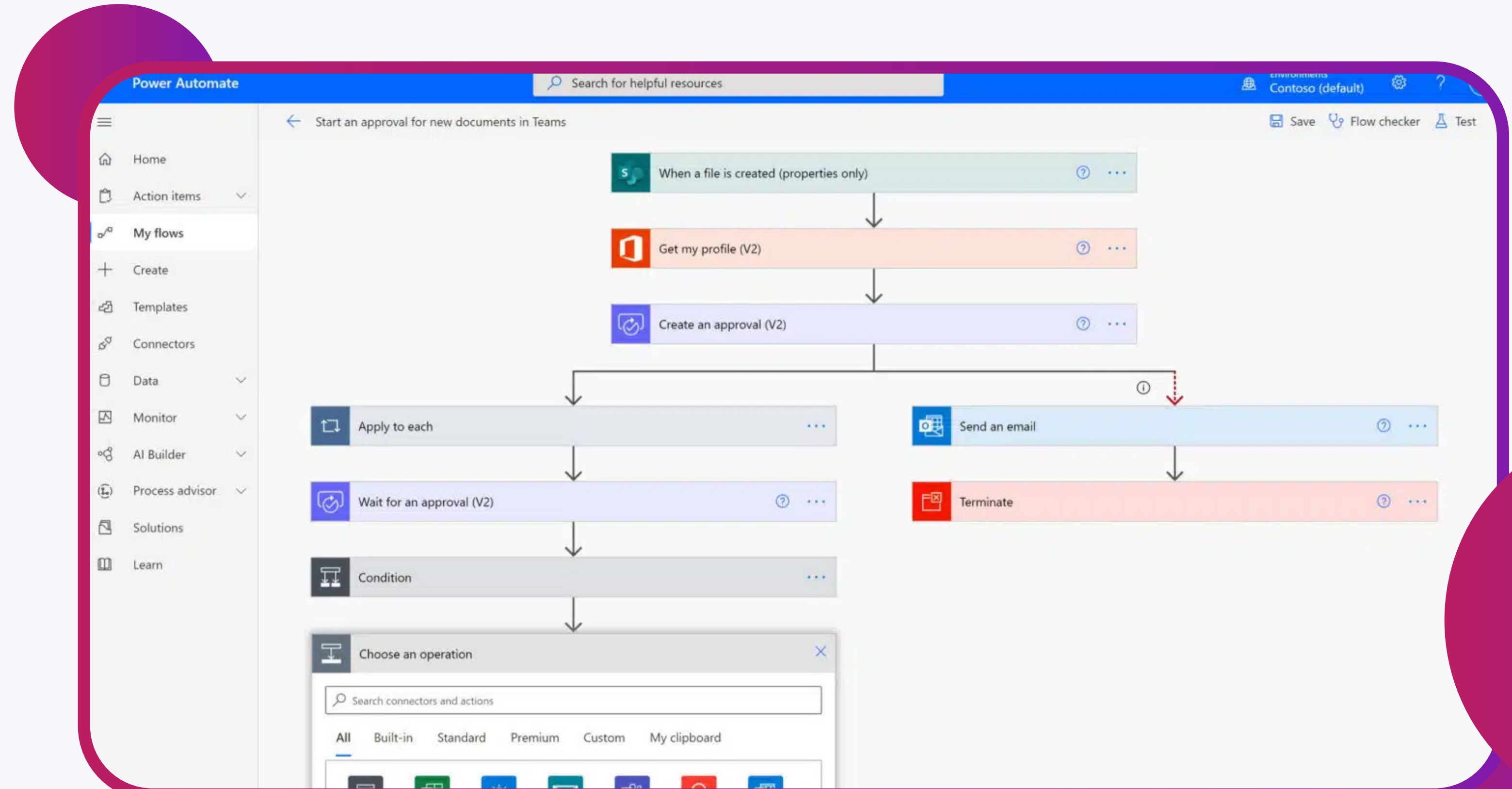
3. Map your key benchmarks

Most nonprofits hope to start campaign planning early and give team members as much time as possible to deliver an outstanding effort, but stakeholders may have different opinions on what the timetable should be. [Copilot in Power Automate](#) can support campaign planning by automating predefined workflows and setting action triggers to optimize the overall execution of a campaign. As many campaign activities will need to happen simultaneously, Microsoft 365 Copilot in Outlook and Microsoft 365 Copilot in Microsoft Teams will help you organize team member time and resources to avoid constraints and delays while keeping people's workloads manageable. You can also use [Microsoft Copilot](#) to make suggestions on potential workback schedules.

Now, you try!

"Start an approval for new documents in Microsoft Teams."
[Try Copilot in Power Automate](#)

"Create a sample workback schedule from July to December that includes deadlines for when we need to assess donor readiness, set fundraising goals, achieve board consensus, enlist volunteers, secure advertising and in-kind donations, and fully plan a launch event at the convention center downtown." [Try Microsoft Copilot](#)



Copilot in Power Automate

4. Implement a realistic budget

When it's time to set up a comprehensive campaign budget, [Microsoft Dynamics 365](#) is an ideal place to store your organization's campaign history and financial records. [Copilot in Dynamics 365 Business Central](#) can help track budgets that your finance team and campaign managers can discuss and refine. As the campaign unfolds, you can monitor budget consumption using Copilot in Dynamics 365 Business Central and alert campaign stakeholders to any risks and constraints they should address.

In addition to your historical data, you may want to search the web for current market data to help you set benchmarks. Copilot can help there as well. If you prefer a more lightweight solution, you can also format your budget in a table in Excel, and Copilot can help you analyze and track your data.

Now, you try!

“Format this budget into a pivot table so we can track invoices that are due.” [Try Copilot in Dynamics 365 Business Central](#)

CRONUS USA, Inc. | Finance | Cash Management | Sales | Purchasing | Shopify | All Reports

Customer Ledger Entries: All | Supplier debt by due date

Supplier Name	Amount	Remaining Amount	Due Date Year	Due Date
Relecloud	3,081.84	3,081.84	2024	April
Relecloud	2,877.48	2,877.48	2024	March
Relecloud	2,877.48	2,877.48	2024	February
Alpine Ski House	4,316.92	4,316.92	2024	March
School of Fine Art	2,039.85	2,039.85	2024	April
School of Fine Art	19,944.69	19,944.69	2024	March
School of Fine Art	2,853.48	2,853.48	2024	February
School of Fine Art	16,333.12	16,333.12	2024	February
School of Fine Art	1,223.33	1,223.33	2024	February
School of Fine Art	11,439.05	11,439.05	2024	January
Trey Research	1,012.20	1,012.20	2024	April
Trey Research	1,214.64	1,214.64	2024	March
Trey Research	809.76	809.76	2024	February
	70,023.84	70,023.84		

Columns: Posting Date, Posting Date Year, Posting Date Quarter, Posting Date Month, Document Date, Document Date Year, Document Date Quart..., Document Date Month, Document Type, Document No., Customer No., Customer Name, Description, Department Code

Row Groups: Drag here to set row groups

Values: Sum(Original Am...), Sum(Amount), Sum(Amount (\$))

Copilot in Dynamics 365 Business Central

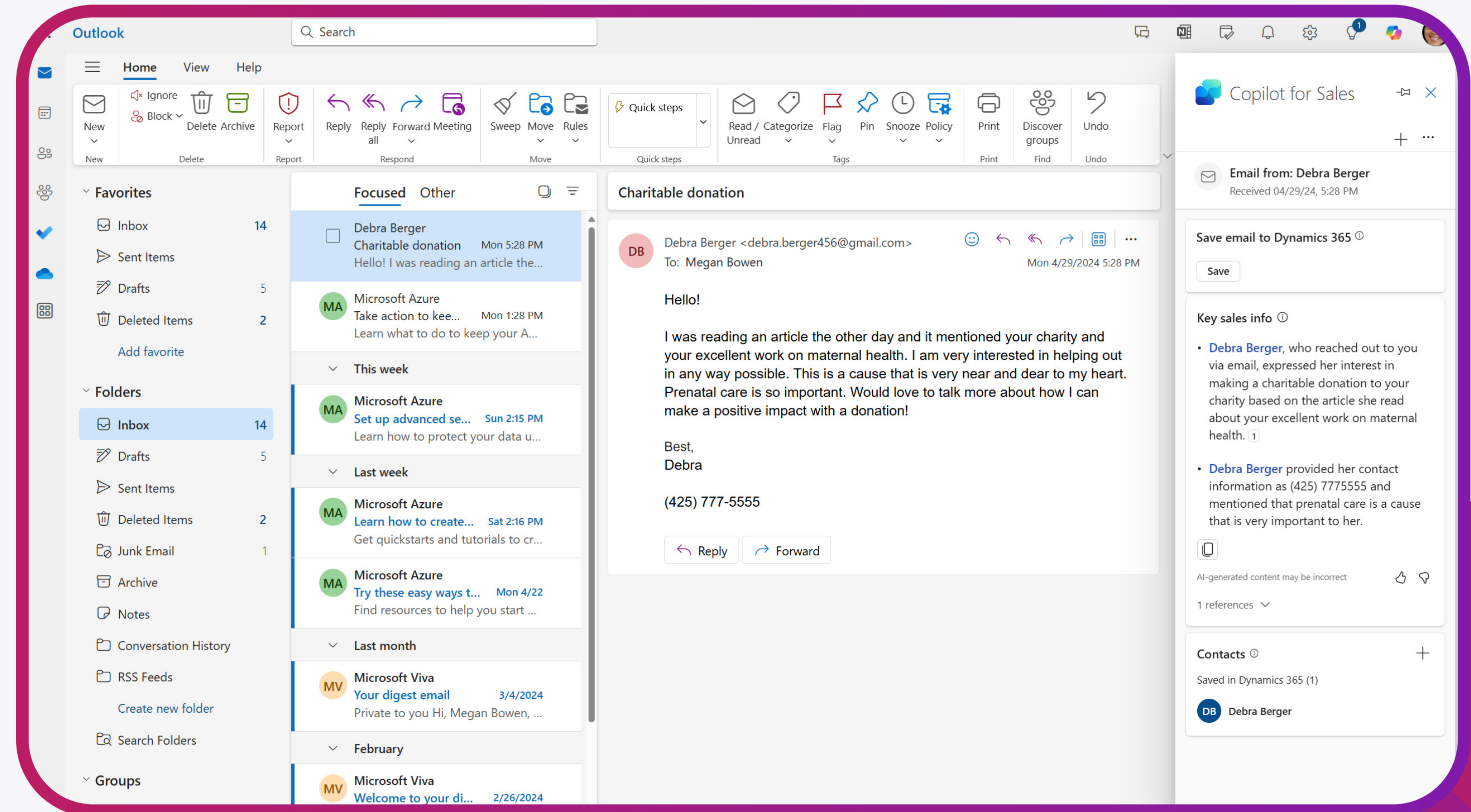
5. Get to know your audience

Experienced fundraisers and marketers know who the most important and loyal supporters are, which individuals and organizations are most likely to donate or volunteer, and where your nonprofit might find additional support. Newer team members may not be steeped in that knowledge. Copilot can help bridge such experience gaps. [Microsoft 365 Copilot for Sales](#) can analyze how donors supported annual and one-off campaigns in the past, show you what proportion of repeat and one-time donors contributed, how giving from donor segments has trended, and more. It can highlight who is most likely to donate again and identify donors you could approach for larger or more frequent donations or who might be interested in playing a role at campaign events. For example, if your nonprofit relies on in-kind donations to print marketing materials or cater events, Microsoft 365 Copilot for Sales can help identify businesses and trade organizations that could support your campaign.

Now, you try!

“Summarize key information about [Donor X] based on our email correspondence over the last year.” [Try Microsoft 365 Copilot in Outlook](#)

“Which of our former repeat donors has donated nothing or less than they used to during the Giving Tuesday campaigns of the last three years? Look at the records of past campaign histories to make this determination.” [Try Microsoft 365 Copilot for Sales](#)



Microsoft 365 Copilot in Outlook with Copilot for Sales

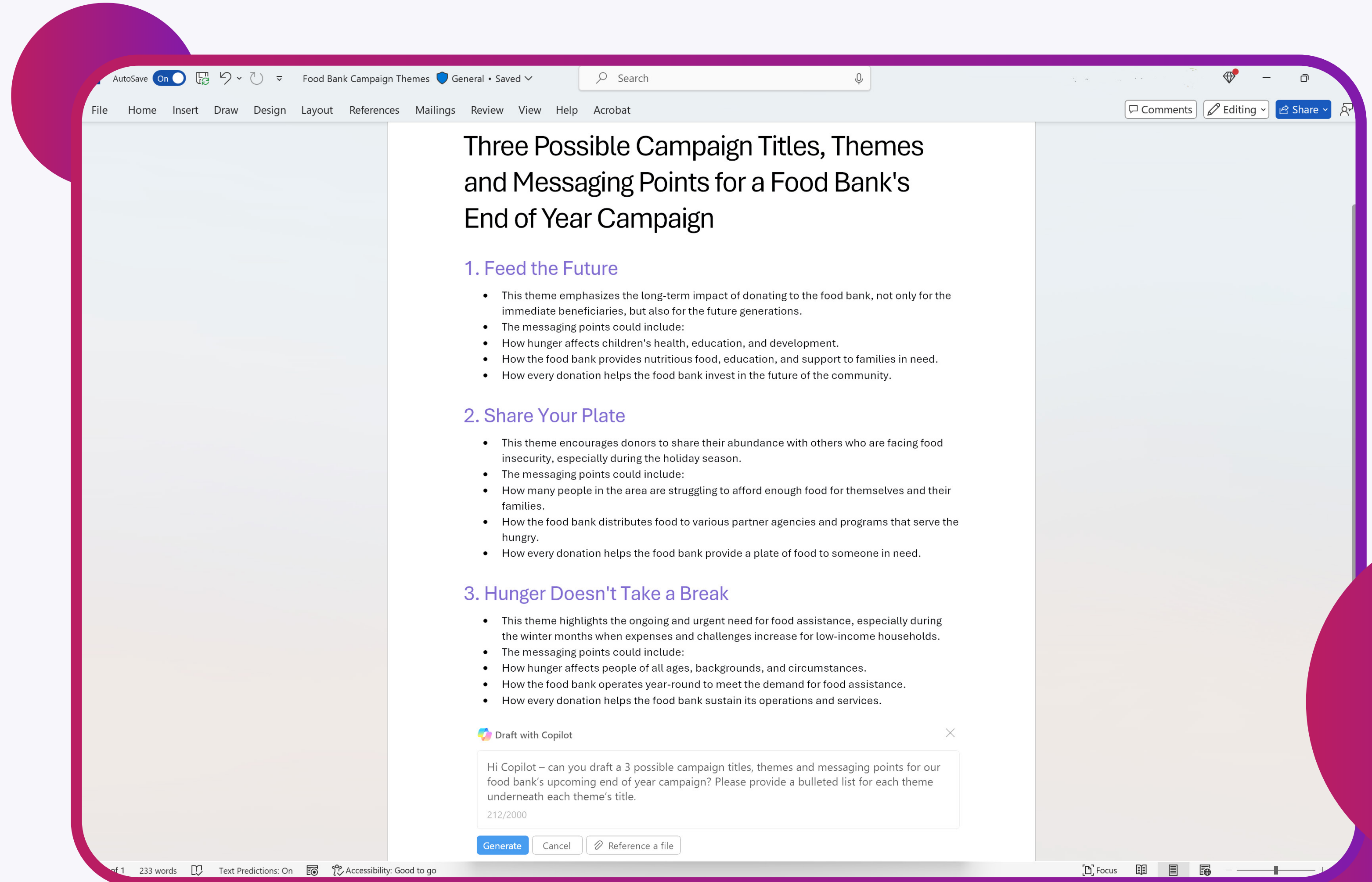
6. Create your core messaging

You have to motivate donors, volunteers, and potential supporters to engage or re-engage in support of the campaign you're about to launch. To accomplish this, your campaign needs a theme and core message that establishes its purpose in a memorable, compelling manner. Because the campaign theme anchors the creative and communications efforts to come, it's critical that it's the best possible statement about the campaign's objectives.

[Microsoft 365 Copilot in Word](#) can augment and accelerate team creativity by proposing possible campaign themes, workshopping them through different iterations, and drafting supporting messaging. Your campaign managers and marketers can validate or dismiss these suggestions and ask Copilot to elaborate and refine those that sound most promising. [Microsoft 365 Copilot in Microsoft Teams](#) can summarize discussions and document decisions regarding campaign themes that come up in meetings so that no great idea is lost, and every contributor's voice is heard.

Now, you try!

"Can you draft three possible campaign titles, themes, and messaging points for our food bank's upcoming end-of-year campaign? Provide a bulleted list for each theme underneath each theme's title." [Try Microsoft 365 Copilot in Word](#)



Microsoft 365 Copilot in Word

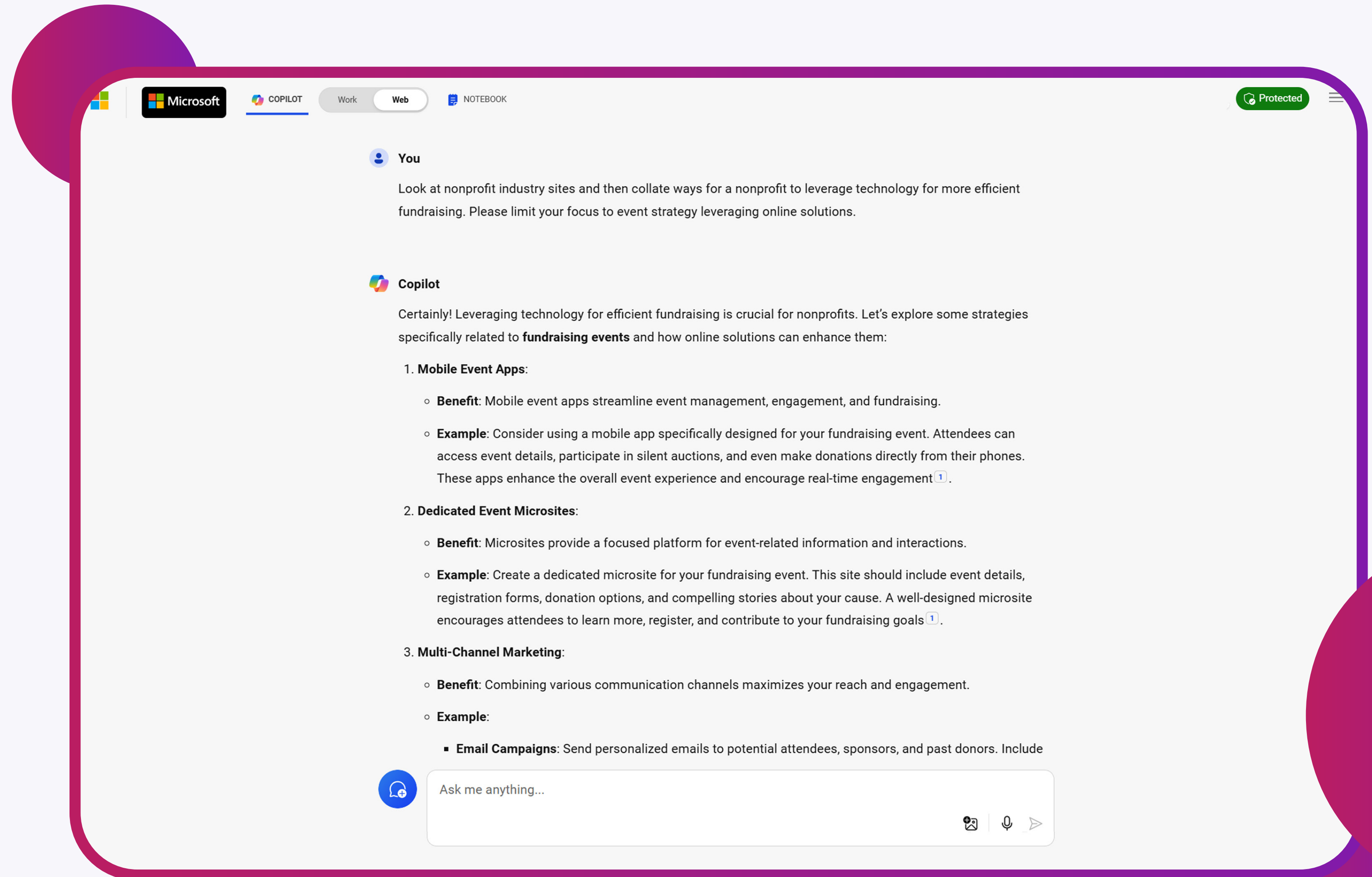
7. Break the year-over-year mold

Your customary campaign structure and its mix of digital and analog channels may work well for your organization and its established donor and supporter audiences. Then again, it may appeal less to demographics that are not yet well-connected to your nonprofit. There may be opportunity for innovation as you think about virtual and in-person events, themed campaign events, crowdfunding, auctions, matching gift programs, sponsorships, merchandise and event ticket sales, in-kind donations, and other activities. [Microsoft Copilot](#) can brainstorm new campaign elements and help establish success criteria, budgets, schedules, and resource needs.

Now, you try!

“Look at nonprofit industry sites and then highlight the ways a nonprofit can use technology for more efficient fundraising. Limit your focus to event strategy based on online solutions.”

[Try Microsoft Copilot](#)



Microsoft Copilot

8. Develop compelling campaign content

In addition to written content, [Microsoft Copilot](#) can help create graphics, images, and illustrations that can generate viewer enthusiasm by innovating within the context of your nonprofit's brand and style. If you aren't sure about an idea or a draft but don't have more time to spend on it, you can ask Microsoft Copilot to propose improvements to make the content stronger.

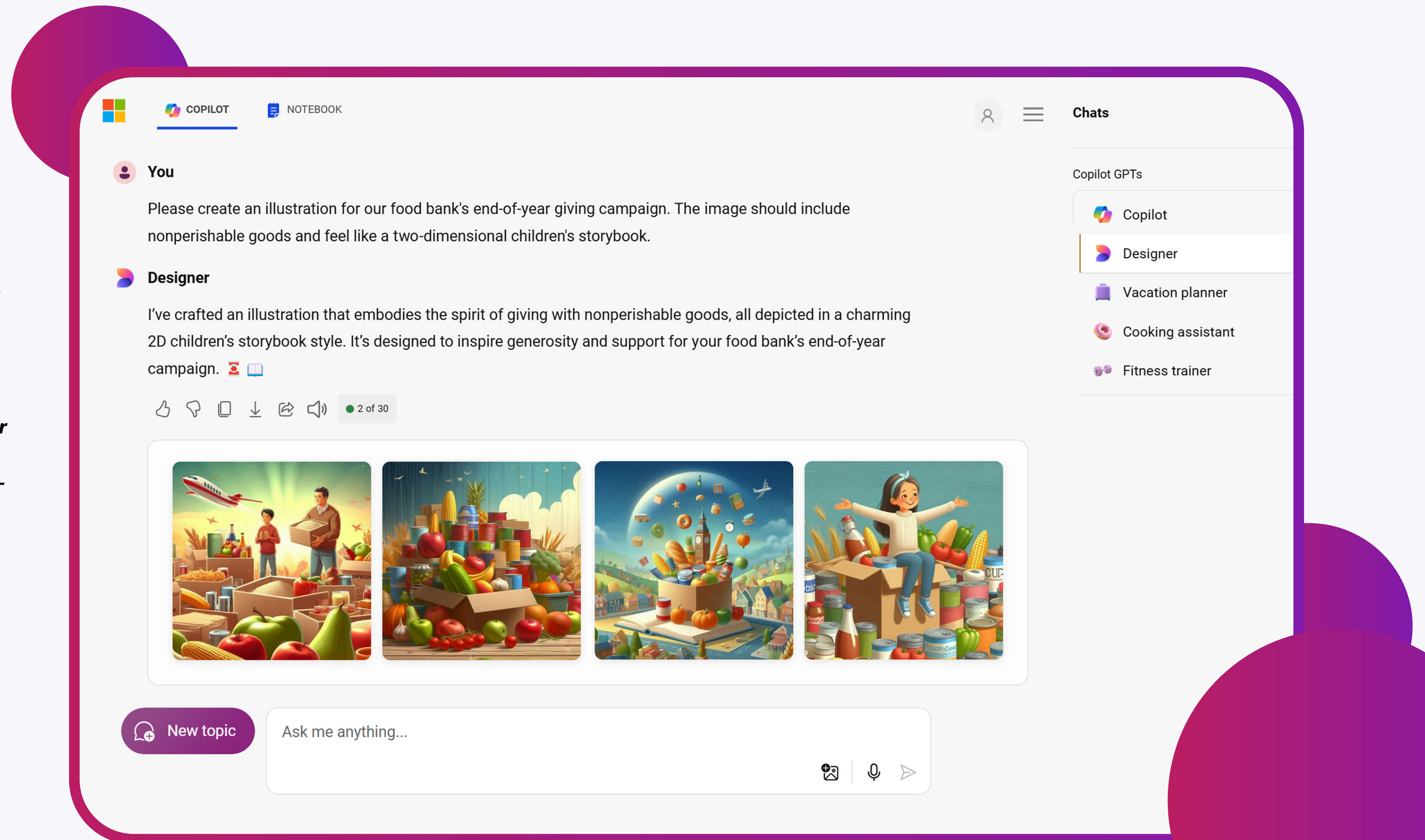
Now, you try!

"Write 120 words or fewer of text that can be used in an email or a printed letter to our donors. Thank them for their support so far, remind them that we're still working on achieving our year-end campaign goals, and ask them for a donation. The letter needs to be friendly yet respectful and in a professional tone."

[Try Microsoft Copilot](#)

"Create an illustration for our food bank's end-of-year giving campaign. The image should include nonperishable goods and feel like a two-dimensional children's storybook."

[Try Microsoft Copilot](#)



Microsoft Copilot

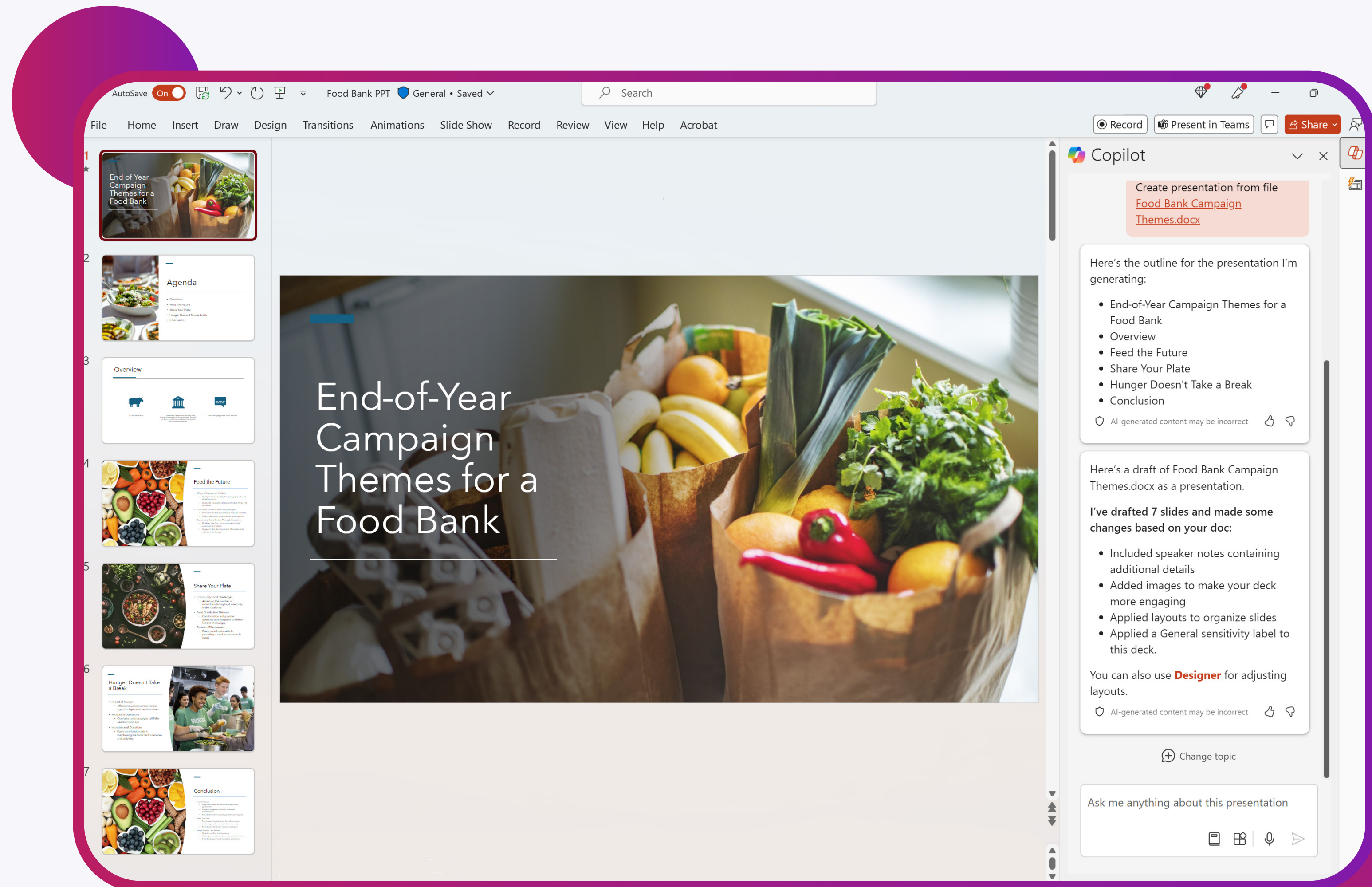
8. Develop compelling campaign content (continued)

When you have already created core messaging, written content, and designed graphics for your campaign, [Microsoft 365 Copilot in PowerPoint](#) can draw on these materials to develop presentations, which can incorporate audio and video files. Microsoft 365 Copilot in PowerPoint can help automate presentations with or without a talk track to run at a booth or on a webpage. It can adjust presentation drafts depending on the venue, such as a large event for the public, a gathering of select donors, or a conversation with one important supporter.

Now, you try!

“Create a presentation from `[/file name].`”

[Try Microsoft 365 Copilot in PowerPoint](#)



Microsoft 365 Copilot in PowerPoint

9. Demonstrate accountability to stakeholders

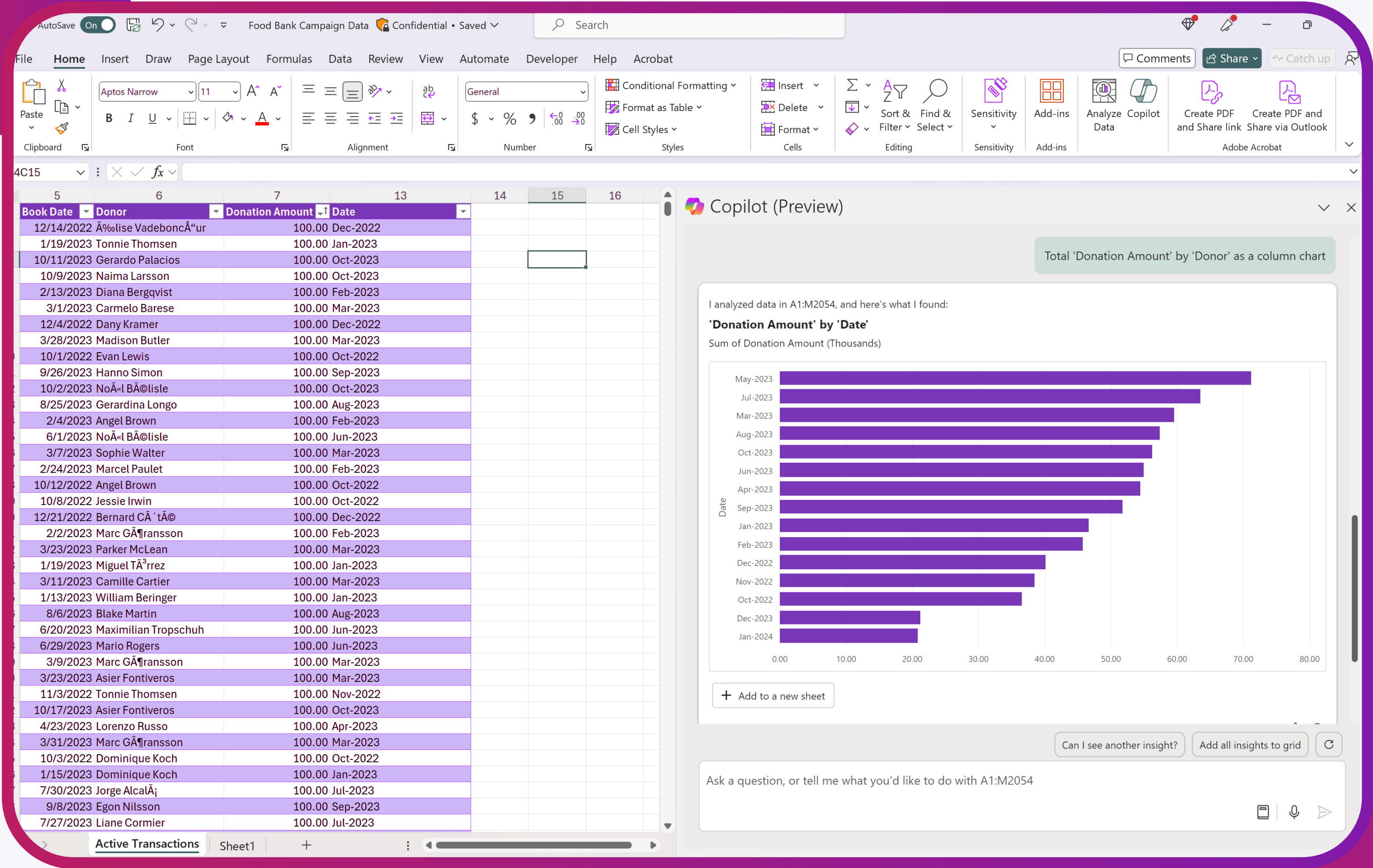
The organization’s board, the campaign team, finance managers, and other stakeholders must be able to track campaign performance. That requires an efficient, reliable reporting mechanism that gives you the flexibility to report in different formats and at varying schedules. Campaign managers will want to be aware of campaign progress in real time, whereas board members and others may prefer less frequent reporting on a set schedule or to sync with campaign milestones.

Campaign and finance teams can document campaign financials in a solution like Excel or Dynamics 365. Copilot in those applications can collate financial data with operational information in other systems and provide current, comprehensive progress assessments in practical formats. [Copilot in Power BI](#) can help visualize this data as well. If a fundraising channel or other campaign element is underperforming, you can quickly reallocate funds and resources or make other adjustments. If certain campaign activities generate results beyond goals and expectations, Copilot can highlight them so you can build on the outcomes.

Now, you try!

“Build a visual that shows us what our fundraising progress to goals for the year-end campaign is today and how far away we are from reaching our goals for donations, major gifts, in-kind donations, new recurring donations, stock donations, matching donations, and workplace donations.” [Try Copilot in Power BI](#)

“Show ‘total donation amount’ by ‘donor’ as a column chart.” [Try Microsoft 365 Copilot in Excel](#)



Microsoft 365 Copilot in Excel



Next steps

Now is the time to delve into Microsoft 365 Copilot and learn how it can help you run successful campaigns. You can evolve your organization's campaign management as this year's AI-enhanced campaigns provide insights and inform best practices for next year's efforts.

The Microsoft Tech for Social Impact team is here to help you make the most of Copilot and thrive with AI. To learn more about the different versions of Copilot across Microsoft applications:

- [Contact Microsoft Tech for Social Impact](#)
- [Learn more about Microsoft 365 Copilot](#)
- [Access free AI skilling](#)
- [Learn about Microsoft solutions, grants, and offers for nonprofits](#)



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1800 126 499 | enquiries@pa.com.au | pa.com.au

¹ Givebutter, [Nonprofit burnout statistics: The high cost of high turnover](#), May 11, 2022.

² EMARKETER, [Generative AI adoption climbed faster than smartphones, tablets](#), August 11, 2023.