

Copilot prompts for development directors

Four kinds of work. Twelve prompts to try this week.

Works from your work, not the open web.

With a Microsoft Copilot license. Copilot Chat alone uses the web and what you paste or upload.



Your files

Documents and workbooks in SharePoint and OneDrive



Your email and chats

Outlook mail and Teams conversations



Your meetings

Teams recaps and who agreed to what



Your permissions

Only what you can already open

01

Know your donors

Excel · Outlook · Word · Teams



Excel

See who gave more, less, or stopped

Try: In this gift export, group donors by giving level and show who increased, decreased, or stopped giving compared with last year. Add a column for the date of each donor's last gift.



Outlook

Prepare for a donor lunch

Try: Before my lunch with this donor, summarize our email history from the past year, any gifts or pledges mentioned, and the last thing we promised to send them.



Excel

Find event regulars who have never given

Try: Compare this event attendance list with our donor export. List people who came to two or more events but have never made a gift, sorted by most recent event.

02

Appeals and thank-yous

Word · Outlook



Word

Draft the spring appeal

Try: Draft our spring appeal letter around the story in this program update. Keep it to one page with one clear ask, and add a postscript that repeats the ask.



Outlook

Thank a first-time donor

Try: Write a thank-you email for a first gift of \$500 to our literacy program. Say in plain terms what the gift supports and invite them to our family reading night.



Word

Adapt one appeal for three audiences

Try: Rewrite this appeal for three groups: monthly donors, people who last gave two years ago, and board members' personal networks. Keep the core story and change the ask for each.

03

Major gifts and campaigns

PowerPoint · Word · Excel



PowerPoint

Build a naming-gift proposal

Try: Build a five-slide proposal for a \$50,000 naming gift for our new classroom: the need, the plan, what the recognition includes, and the timeline.



Word

Draft the campaign case for support

Try: Draft a case for support for our capital campaign from this feasibility study summary and building plan. Sections: why now, what it costs, and what changes for the families we serve.



Word

Plan a year of stewardship for top donors

Try: Write a 12-month stewardship plan for our top 25 donors: one touch a month mixing updates, invitations, and thank-yous, with an owner for each.

04

Reporting to the board and team

PowerPoint · Word · Excel · Teams · Forms



PowerPoint

Give the board a development update

Try: Build a four-slide development update for the board from this quarter's results: revenue against goal, donor retention, the pipeline, and where we need board help.



Word

Prepare board members for thank-you calls

Try: Draft talking points for board members making thank-you calls this month: who they're calling, why it matters, and three things to say.



Excel

Spot the months falling behind

Try: Compare this year's giving by month with last year's. Flag any month more than 15 percent behind and give the likely reason from the notes column.

Copilot drafts; a person checks every name, number, and fact. Keep individual case, health, and student records out of prompts, and follow your organization's AI and data policies.



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All 100 prompts
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