



Copilot Agent Playbook for Nonprofits



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Agents in action

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Start building agents today

What is an agent?



What are agents?



And how can your nonprofits use them?

Copilot Agents are AI-powered **assistants** that provide you with **the ability to deliver tailored and automated solutions** to help with repetitive tasks and processes.

Whether working alongside or on behalf of a person, team, or organization, agents streamline operations, allowing nonprofit staff to focus more on their mission and less on administrative tasks.

In this playbook, we explore how Copilot agents can enhance common nonprofit workflows. These agents can be developed and accessed in several ways:

- Through templates available in Microsoft 365 Copilot Chat
- Custom-built within Microsoft 365 Copilot Chat
- Designed using Copilot Studio
- Offered by third-party providers

This guide walks you through practical use cases to help you:



Enrich nonprofit staff experiences

- Support your teams across multiple functions



Engage supporters and funders

- Support your marketing and fundraising teams



Deliver impactful programs

- Support your program and mission delivery teams



Transform nonprofit operations

- Support your IT, HR, and finance teams

What's the difference between copilots and agents?



Copilot

Every employee has a Copilot

Your personal AI assistant for work

Grounded in work content like email, meetings, and documents

The UI for AI



Agents

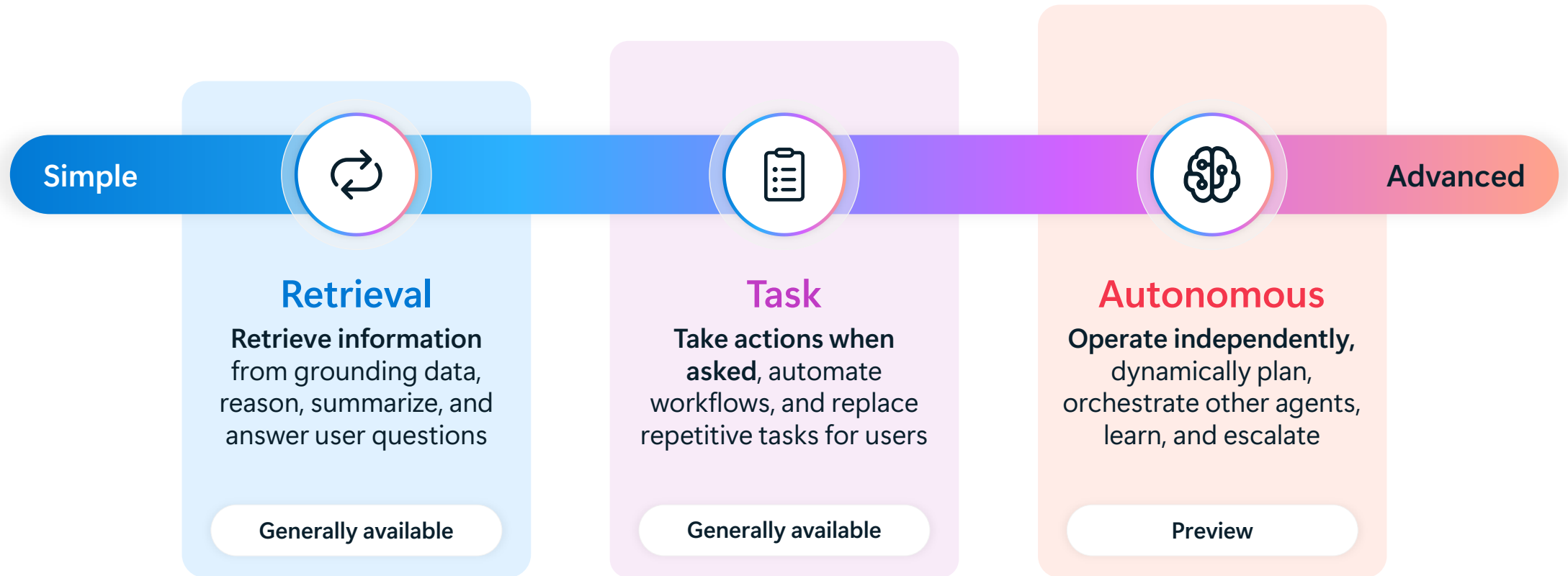
Every business process has an agent

AI-powered system with actions, triggers, and knowledge

Works on behalf of employees, teams, and functions

Connected to Copilot or autonomous

What can agents do?



←..... Agents vary in levels of complexity and capabilities depending on your need→

What kinds of agents can you use?



Agent templates

Agent templates in Microsoft 365 Copilot Chat and Microsoft 365 Copilot are ready-to-use AI assistants designed to streamline common tasks like meeting preparation, email summarization, and document drafting across Microsoft 365 apps.

They work out-of-the-box with your organization's data and workflows, delivering immediate productivity gains without the need for custom development.

For nonprofits, these agents help maximize impact by reducing administrative overhead, enabling teams to focus more time and resources on mission-driven work.



Build-your-own agents

You can also build your own agents in Copilot Studio agent builder, SharePoint, and Copilot Studio. These give you access to advanced AI capabilities—allowing your organizations to scale intelligent assistance across workflows without upfront licensing commitments.

These agents can be deployed for specific tasks or departments, making them ideal for nonprofits that need to optimize limited budgets while still benefiting from powerful automation and insights.









[Explore examples of both agents on the following slides](#)



Examples of agent templates in Microsoft 365 Copilot Chat






The simplest way to get started with agents. Once enabled by an admin, users can @mention the agent in Copilot Chat or open it directly by selecting it from the right-side pane.

Agent name	Description
 Writing Coach	Provides detailed feedback on writing Helps change the tone of messages, translates text, and assists in writing tasks
 Idea Coach	Helps users brainstorm and organize ideas
 Prompt Coach	Assists users in creating effective well-structured prompts for Copilot
 Career Coach	Provides personalized career development suggestions including role understanding, skill gap analysis, learning opportunities, and career transition plans
 Learning Coach	Helps users understand complex topics by breaking them down into simple, intermediate, and advanced summaries Provides guided practice and learning plans
 Visual Creator	Assists users with creating images and videos

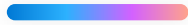
Anyone with a Microsoft 365 account can begin using these!

Examples of agent templates in Microsoft 365 Copilot Chat

These agents can be easily built using the agent builder in Copilot Chat. Once shared, users with access can add the agent by selecting **Get Copilot Agents** in Copilot Chat in the right-side pane.

Agent name	Description
 Onboarding Buddy	Assists new hires with onboarding processes, provides training, answers questions, and sets up meetings
 Resume Reviewer	Evaluates resumes against job descriptions and scores candidates based on qualifications
 Contract/ Legal Review	Automates review and analysis of legal documents, identifies key clauses, and assesses compliance
 Research Assistant	Retrieves research materials from company databases and enhances productivity by providing relevant information
 Policy Search	Offers comprehensive policy lookup capabilities and answers inquiries about company policies

Out-of-the-box agents


Streamline
business processes
seamlessly across
Microsoft 365 apps



Analyst agent



Researcher



Facilitator



Sales agent



Employee
Self-Service



Sales chat



Interpreter



SharePoint agents



Project Manager



Skills agent

Low-code options for creating agents*

*Developers can learn about additional options to create agents through [Microsoft learn](#).

*There are other ways to build agents through Teams Toolkit Visual in Visual Studio Code and Azure Foundry



Copilot Studio agent builder



SharePoint



Copilot Studio

Target audience	End user, IT	End user, IT	IT
When to use?	Simple option to query organizational knowledge and general web content from within Copilot Chat	Simple option to query content from a specific SharePoint site, folder, or from specific files within SharePoint or Teams chats	Powerful option to retrieve knowledge and perform tasks using a variety of data sources with many deployment options
Who can build?	<ul style="list-style-type: none"> Anyone with access to Microsoft 365 Copilot Chat if the tenant has enabled pay-as-you-go for Copilot Studio Users with a Microsoft 365 Copilot license 	<ul style="list-style-type: none"> Anyone with access to SharePoint if the tenant has enabled pay-as-you-go for SharePoint Users with a Microsoft 365 Copilot license 	Users with a Microsoft 365 Copilot license or Copilot Studio user license
Agent complexity	Search and retrieval	Search and retrieval	<ul style="list-style-type: none"> Search and retrieval Task based Autonomous
Where users access?	<ul style="list-style-type: none"> Copilot Chat (Microsoft 365 app and Teams) Copilot Studio 	<ul style="list-style-type: none"> SharePoint Teams chat 	<ul style="list-style-type: none"> Teams Copilot Chat (Microsoft 365 Copilot app, Teams, and Outlook) Websites Apps
What data is supported?	<ul style="list-style-type: none"> General web content Microsoft Graph connectors SharePoint sites, folders, and files 	<ul style="list-style-type: none"> SharePoint sites, folders, and files Microsoft Graph data 	<ul style="list-style-type: none"> SharePoint sites, folders, and files Microsoft Graph connectors 1,400+ Power Platform Data Connectors Public websites Dataverse tables API data
What else do I need to know?	<ul style="list-style-type: none"> Shareable across a user's organization Capability of agents varies depending on billing model (free, consumption, or Microsoft 365 Copilot license) 	<ul style="list-style-type: none"> Based on SharePoint data Prebuilt for SharePoint sites or create your own Shared as file link based on existing user permissions and security settings When file is shared to Teams chat, agent can be accessed within that chat SharePoint agents require a Microsoft 365 Copilot license or Copilot Studio consumption-based licenses 	<ul style="list-style-type: none"> Allows for many data sources and can be deployed outside of Microsoft 365 Allows actions/task agents Some agent capabilities require Copilot Studio messages regardless of Microsoft 365 Copilot licensing. For example: <ul style="list-style-type: none"> Using generative orchestration or generative answers Published outside of Microsoft 365 Used externally or by employees without a Microsoft 365 Copilot license

Enrich nonprofit staff experiences

Support your teams across multiple functions



Scenario overview: Writing Coach agent

 Agent template with Microsoft 365 Copilot Chat



Goal

Enhance the quality and effectiveness of written communication by providing detailed feedback, improving tone and clarity, supporting translation, and assisting in the creation of diverse content types—from instructions and white papers to stories, blog posts, and grant proposals. The agent focuses on clarity, coherence, grammar, and overall impact, offering actionable suggestions tailored to each writing context.



Personas



Content Marketing
Manager



Social Media
Manager

Opportunity area – Key functional KPIs that agent will contribute to



Content quality

Deliver actionable feedback on clarity, coherence, grammar, and tone to improve writing effectiveness and reduce editorial review cycles.



Content formalization

Convert informal or unstructured text into professional-grade documents, supporting consistency and efficiency in content production.



Tone and localization

Provide targeted suggestions to align tone and style with audience expectations, enhancing localization readiness and brand consistency.

Example scenarios where agent can assist...

- **Writing refinement:** Suggests improvements for grammar, clarity, coherence, and key content focus.
- **Audience targeting:** Recommends tone and detail adjustments tailored to specific audiences.
- **Global readiness:** Flags culturally sensitive language and offers inclusive alternatives.
- **Long-form content creation:** Assists with audience targeting, topic generation, and document structure.


External communications | Writing Coach agent

Agent template with Microsoft 365 Copilot Chat

1. Activate the Writing Coach agent

Launch the agent template Writing Coach agent in Microsoft 365 Copilot Chat to begin crafting high-quality content. In this case, we'll use it to develop engaging social media copy for an upcoming gala.



 Agent template with Microsoft 365 Copilot Chat

Benefit: Instantly access expert writing support to improve clarity, tone, and impact—no setup required.

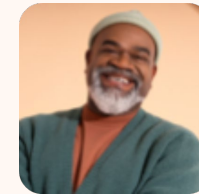
2. Define the gala's key message & audience

Clarify the core message and tailor it to your target audience. The agent refines your message for clarity and audience alignment.



Example question: "What's a compelling way to introduce our annual gala to a professional LinkedIn audience?"

Personas



Content Marketing Manager



Social Media Manager

3. Draft the initial social media post

Generate a first version of your post that highlights key event details.

The agent produces a polished, engaging draft with the right tone and structure.



Example question: "Can you draft a LinkedIn post that highlights our keynote speaker and encourages early registration?"

4. Optimize for tone & localization

Adjust the tone and language to resonate with diverse, global audiences.

The agent suggests tone adjustments and flags culturally sensitive language.



Example question: "Can you adjust this post to sound more celebratory and inclusive for a global audience?"

5. Finalize & format for publishing

Prepare the content for different platforms and finalize for scheduling.

The agent tailors content for platform-specific best practices and character limits.



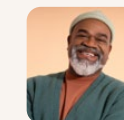
Example questions: "Can you format this post for LinkedIn and suggest a shorter version for Instagram?"

Measuring business value: Writing Coach agent

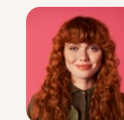
Approach: Enhance content creation and communication efficiency by using the Writing Coach agent to elevate writing quality, ensure brand consistency, and align messaging with target audiences. By leveraging Microsoft AI technologies, the agent provides real-time feedback on clarity, coherence, grammar, and tone—reducing editing cycles, accelerating content delivery, and supporting high-impact communication across formats.

- Improves clarity, coherence, grammar, and tone across written content
- Reduces manual editing workload and review time through intelligent suggestions
- Supports faster, higher-quality content creation for diverse formats (e.g., white papers, blogs, grant proposals, social media content)
- Enhances consistency and readiness for localization or publication with tone and style alignment

Personas



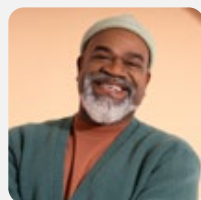
Content Marketing Manager



Social Media Manager

Content Marketing Manager

Personas



Key process KPIs

- ✓ **Content quality score:** Improvement in clarity, coherence, and tone across long-form content.
- ✓ **Editing cycle reduction:** Decrease in the number of review rounds before publication.
- ✓ **Time to publish:** Faster turnaround from draft to final content.
- ✓ **Audience engagement:** Increased engagement metrics on content (e.g., time on page, shares, downloads).

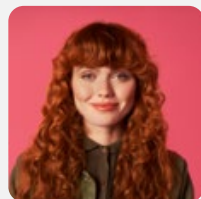


Functional KPIs

- ✓ **Grammar and style accuracy:** Reduction in manual grammar/style corrections.
- ✓ **Content consistency:** Improved alignment with brand voice and messaging across documents.
- ✓ **Localization readiness:** Increase in content flagged as ready for translation/localization.
- ✓ **Content formalization:** Number of informal drafts converted into professional-grade documents.

Social Media Manager

Personas



Key process KPIs

- ✓ **Engagement rate:** Increase in likes, shares, comments, and click-throughs on social posts.
- ✓ **Content velocity:** Number of posts created and published per week/month.
- ✓ **Brand consistency:** Improved alignment of tone and messaging across platforms.
- ✓ **Campaign performance:** Uplift in performance of campaigns using AI-assisted copy.



Functional KPIs

- ✓ **Tone optimization:** Number of posts adjusted for tone and audience fit.
- ✓ **Platform adaptation:** Efficiency in tailoring content for different social platforms.
- ✓ **Inclusive language use:** Reduction in flagged or culturally insensitive language.
- ✓ **Draft-to-post time:** Time saved from initial idea to scheduled post.

Deliver impactful programs

Support your program and mission delivery teams



Scenario overview: Volunteer Management agent

 Built with Copilot Studio

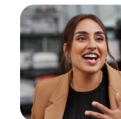


Goal

Make it easier to manage surveys, form questions, and feedback. By using AI agents, program managers can save time on admin tasks, respond faster, and keep volunteers more engaged—helping campaigns run more smoothly and successfully.



Personas



Program
Manager



Volunteer
Coordinator

Opportunity area – Key functional KPIs that agent will contribute to



Volunteer engagement scores

Automatically send out surveys and gather feedback to better understand volunteer experiences. This helps improve how things are run and encourages people to stay involved longer.



Improve operational efficiency

The agent can answer common questions from the community—like how to sign up or volunteer—so program managers can focus on the big picture, not their inbox.



Save time, reduce cost, & boost productivity

No more long email chains or digging through shared mailboxes. The agent provides quick answers to FAQs and shares important campaign info, which helps everyone stay informed and happy.

Example scenarios where agent can assist:

- **Support volunteer onboarding** by answering common questions and providing access to training materials.
- **Enhance engagement** through automated surveys and feedback collection.
- **Streamline communications** by reducing inbox overload with quick, AI-powered responses.
- **Identify improvement areas** using trends from volunteer data to inform strategy.

Program management | Volunteer Management agent

Starter scenario – declarative agent plus knowledge

1. Create a Copilot agent


Implementation step: Create a declarative agent in agent builder using guided prompts as provided below. Connect it to SharePoint or upload volunteer onboarding and feedback information as files.

 Copilot Studio agent builder
SharePoint

Example prompt: "Create an agent that can answer common questions from program managers and volunteer coordinators about the onboarding process, training materials, event schedules, and volunteer policies. It must also help staff quickly locate feedback forms and past engagement summaries to support planning and reporting."

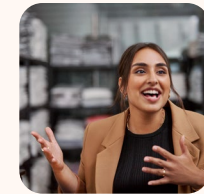
2. Volunteer feedback (still declarative)

Use the same agent to surface additional content from SharePoint, like donor feedback or training info, via natural language.

 Copilot Studio agent builder
SharePoint

Example prompt: "Where can I find the training materials for new volunteers" or "Can you give me a summary of the latest feedback we received."

Personas



Program Manager



Volunteer Coordinator

Advanced scenarios – declarative agent plus knowledge and actions

3. Make the agent autonomous

Implementation step: In Copilot Studio, extend the agent by adding a **trigger** (e.g., new email in inbox) and an action (parse and respond). Use connectors like Outlook and SharePoint.

 Copilot agent
+ Send an email action + When a new email arrives trigger.

4. Inquiry handling & response

The agent automatically identifies the intent of donor and volunteer emails, retrieves necessary information from SharePoint, and provides an accurate response.

 Copilot agent

Benefit: Minimize manual email processing and ensure consistent and accurate responses to donor and volunteer inquiries.

5. Volunteer & donor insights

Implementation step: Add Power BI connector in Copilot Studio to pull data like survey results and engagement trends. Auto-generate dashboards for campaign and program teams.

 Copilot agent
+ Power BI

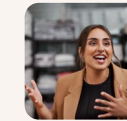
Example questions: "What are the key trends in volunteer attendance and donor engagement?" or "Which campaigns had the highest donor retention rates over the past 6 months?"

Measuring business value of AI for Volunteer Management agent

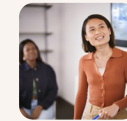
Approach: Use AI agents to help program teams manage questions, send surveys, and get insights faster. This cuts down the time spent on emails, improves the volunteer experience, and helps teams make better decisions using real-time data.

- Improves volunteer and donor experience
- Reduces workload on program teams by automating shared mailbox responses
- Provides data-driven insights to improve engagement and campaign effectiveness

Personas



Program Manager



Volunteer Coordinator

Starter scenarios – declarative agent + knowledge

Personas

Volunteer Coordinator



Key process KPIs

- ✓ Increase the workflow automation rate
- ✓ Improve decision-making efficiency
- ✓ Reduce operational costs by cutting manual email handling



Functional KPIs

- ✓ Reduce response time to inquiries
- ✓ Improve community engagement and satisfaction
- ✓ Enhance survey data collection and analysis
- ✓ Improve onboarding completion rate for new volunteers

Advanced scenarios – declarative agent + knowledge + actions

Personas

Program Manager



Key process KPIs

- All KPIs from starter scenario PLUS
- ✓ Reduction in overdue tasks related to volunteer follow-ups
 - ✓ Automated handling of email inquiries, reducing manual workload
 - ✓ AI-driven trend analysis of volunteer engagement and donor interactions
 - ✓ Power BI integration to provide real-time insights into donation trends and volunteer feedback



Functional KPIs

- The above KPIs PLUS
- ✓ Increased team productivity by reducing time spent on manual inquiries
 - ✓ Improved response rate and accuracy for donor and volunteer requests
 - ✓ Cost optimization by reducing administrative overhead
 - ✓ Enhanced campaign success rate with AI-driven insights

Scenario overview: Partner Recruitment agent

 Built with Copilot Studio

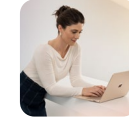


Goal

Make it faster and easier to find, check, and onboard new partners for grassroots support networks. AI helps match the right partners to community needs, speeds up approval processes, and makes partner management simpler and safer.



Personas



Legal & Compliance



Partnerships Coordinator

Opportunity area – Key functional KPIs that agent will contribute to



Improved partner identification & suitability matching

The agent matches local needs with partner capabilities, helping teams quickly spot organizations that are a good fit. It automatically highlights gaps and uses past performance to guide smarter choices.



Reduced onboarding risks

Onboarding tasks like policy checks and eligibility reviews are automated, reducing delays. The agent can flag missing information, send reminders, and help move approvals along faster.



Partner development

Tracks review cycles and policy updates, flags expired documents, and enables analysis of onboarding trends to inform future improvements.

Example scenarios where agent can assist:

- Which partners work in areas facing high need for your nonprofit's support services?
- Which new partners meet all onboarding criteria but are still awaiting approval?
- Can we prioritize partners based on overlap with our campaign goals?
- What is the average time-to-onboard for new partners?
- Which partner policies are due for review or have expired?

Program management | Partner Recruitment agent

Starter scenarios – declarative agent + knowledge

1. Create a Copilot agent

Implementation step: Create a Copilot agent in agent builder and connect it to a dynamic Excel file in SharePoint Online to track partner application submissions.

 Copilot agent
+ Excel

Example prompt: “Build an agent that allows program teams to check new partner applications submitted each week. The agent should use an Excel file in SharePoint as its knowledge source and return partner names, submission dates, and current onboarding status when asked.”

2. Check onboarding progress

The Copilot agent can query current onboarding stages: missing documents, pending reviews, or completed onboarding tasks.

 Copilot agent
+ Excel

Example Prompt: “Which partners have passed legal checks but are missing safeguarding documents?”

 Personas



Legal & Compliance



Partnerships Coordinator

Advanced scenarios – declarative agent plus knowledge and actions

3. Extend agent with Power BI connector

Implementation step: In Copilot Studio, go to your agent’s plugins section. Add the Power BI connector and sign in to connect your workspace. Create a new action that queries your published Power BI dataset or report (e.g., “PartnerOnboardingInsights”).

 Copilot agent
+ Power BI

4. Monitor trends

Use the agent to spot trends, track performance, and identify gaps.


 Copilot agent
+ Power BI

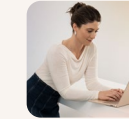
Example questions: “What is the average time to onboard a partner this quarter?” or “Which sectors are seeing the fastest onboarding times?” or “Which areas don’t have an approved partner?”

Measuring business value of Partner Recruitment agent

Approach: Copilot agents to automate and streamline partner identification, onboarding, and monitoring. Equip partnership, impact, and compliance teams with conversational access to live and historical onboarding data, accelerating recruitment, improving due diligence, and enabling better partner coverage.

- Speeds up partner onboarding by reducing manual admin and checks
- Increases confidence in partner selection through better data matching
- Enables targeting of partners based on community need and strategic priority

 **Personas**



Legal & Compliance



Partnerships Coordinator

Starter scenarios – declarative agent + knowledge

Personas

Partnerships Coordinator



Key process KPIs

- ✓ Automate tracking of onboarding form submissions via SharePoint/Forms
- ✓ Reduce time reviewing incomplete applications
- ✓ Provide quick visibility into status and document gaps



Functional KPIs

- ✓ Save up to 3 hours per week currently spent chasing missing partner documents
- ✓ Reduce average onboarding query time by 50% via conversational AI
- ✓ Improve transparency on partner approval status across teams

Advanced scenarios – declarative agent + knowledge + actions

Personas

Legal & Compliance



Key process KPIs

- ✓ Automatically flag missing or expired documents through Power Automate
- ✓ Cross-reference partner submissions with geographic need data to suggest recruitment priorities
- ✓ Generate onboarding trend dashboards to support recruitment strategy



Functional KPIs

- ✓ Reduce onboarding lead time from 6 weeks to under 4 weeks
- ✓ Ensure 100% safeguarding policy compliance through automated checks
- ✓ Identify top partner gaps in high-need regions via dashboard visualization

Engage supporters and funders

Support your marketing and fundraising teams



Scenario overview: Donor Opportunity agent

 Built with Copilot Studio

See the donor opportunity agent in action

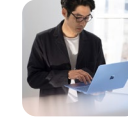


Goal

Streamline donor funding tracking and financial forecasting processes. Enable proactive strategic planning, enhance financial transparency, and identify and manage funding gaps efficiently.



Personas



Grant Manager



Financial Analyst

Opportunity area – Key functional KPIs that agent will contribute to



Operational efficiency & risk management

Automate integration and analysis of financial data from systems (e.g., Dynamics 365, Excel), reducing manual tasks significantly. Minimize discrepancies and human error in financial reporting and updates.



Enhanced financial planning & visibility

Provide real-time financial tracking and analysis, enabling budget holders and project leads to manage expenses accurately and avoid overspending. Proactively highlight funding gaps or imminent end dates, enabling timely strategic decisions for securing continued funding.



Improved reporting

Generate intuitive visual dashboards (Power BI) for financial data, replacing static Excel tables and manual slide decks. Automate financial reporting, fostering clearer communication between fundraising, finance, and project teams.

Example scenarios where agent can assist...

- What is the current spend across all donor-funded projects?
- Which projects are at risk of underspending or overspending?
- Which funding streams are nearing expiration without follow-on funding secured?
- What is the year-to-date financial performance for each region or project?
- Can you generate a visual dashboard of monthly financial updates?

Fundraising | Donor Opportunity agent

Starter scenario – declarative agent plus knowledge

1. Create a Copilot agent

Implementation step: In Copilot Studio, create a new agent and add SharePoint data as knowledge base.



Example prompt to build agent: "Create an agent that helps grant managers and finance staff track project spending, identify overspending, and view donor funding details."

2. Basic funding queries

Staff query donor allocations, funding timelines, and spend status using natural language. Data comes from existing Excel or exported CSV sheets.



Example questions: "Which Southeast Asia projects are underspending their budget?"

Personas



Grant Manager



Financial Analyst

Advanced scenarios – declarative agent plus knowledge and actions

3. Add Dynamics connector to pull real-time spend data

Implementation step: In Copilot Studio, click add knowledge base and choose the Dynamics 365 knowledge source and select your fields e.g., Donor Name, Amount, Project Name, Funding Status.



Example questions: "Which projects will have a funding gap in the next 3 months?" or "Which grants have unspent balances over \$5,000?"

4. Refresh latest funding data in Power BI

Implementation step: In Copilot Studio, create a topic called "Power BI Data Refresh" and build an Agent Flow that connects to Power BI and triggers a dataset refresh.



Example questions: "Update the donor dashboard" or "Refresh the latest funding data"

5. Easier monthly reporting

The agent supports monthly reporting by allowing users to refresh datasets and surface donor summaries on demand, reducing manual effort and ensuring leadership always has up-to-date insights.



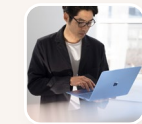
Example questions: "Which donors contributed the most in the last 6 months?" or "List any projects with unspent funds above \$10,000." or "How much was spent on administration costs last month?"

Measuring business value: Donor Opportunity agent

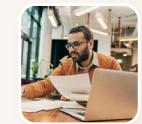
Approach: Copilot agents to automate and streamline donor funding insights, budget reconciliation, and forecasting. Equip fundraising and finance teams with conversational access to real-time and historical data, improving accuracy and strategic planning.

- Reduces manual effort and errors in budget analysis and funding visibility
- Improves accuracy in financial tracking across funding streams
- Enhances ability to plan, forecast, and prioritize donor and project engagement

 **Personas**



Grant Manager



Financial Analyst

Starter scenarios – declarative agent + knowledge

Personas

Financial Analyst



Key process KPIs

- ✓ Automate manual tracking of donor funds using Excel data
- ✓ Enable quick and intuitive access to current spend and remaining budget
- ✓ Support proactive visibility into funding timelines and project allocations



Functional KPIs

- ✓ Reduce time spent manually compiling and reviewing donor spend data
- ✓ Avoid underspending and overspending across multiple donor streams
- ✓ Improve access to donor and project budget status via conversational AI

Advanced scenarios – declarative agent + knowledge + actions

Personas

Grant Manager



Key process KPIs

- ✓ Reconcile spending data in real time
- ✓ Identify projects at risk of funding expiry or with no secured funding beyond current term
- ✓ Automate monthly donor financial reporting and dashboard creation



Functional KPIs

- ✓ Immediate visibility into funding gaps and project risk
- ✓ Improved accuracy and consistency in strategic financial planning
- ✓ Reduce manual reporting efforts by automating funding insights into Power BI dashboards

Scenario overview: Analyst agent

 Built with Microsoft 365 Copilot



Goal

Help staff interpret raw data—like volunteer hours, donations, and people served—and turn it into clear, visual summaries. The Analyst agent guides users through understanding what the numbers mean and how to present them using simple visuals like charts or heatmaps, making it easier to communicate impact to boards, funders, and the wider community.



Personas



Program
Coordinator



Grant
Manager

Opportunity area – key functional KPIs that agent will contribute to



Make data easier

Help staff who aren't data experts feel confident using numbers to tell their story. The agent guides them step-by-step to build clear, meaningful reports.



Save time

Reduce the hours spent pulling data, formatting slides, and writing summaries. The agent automates repetitive tasks so teams can focus on impact.



Tell a clearer story

Standardize how data is presented—like using heatmaps or summaries—so stakeholders quickly understand what's working and where support is needed.

Example scenarios where agent can assist...

- **Board reporting:** Summarize volunteer hours, donations, and people served into a clear, visual update for quarterly board meetings.
- **Grant applications:** Pull and format impact data to support funding proposals with charts and concise summaries.
- **Internal team updates:** Provide monthly snapshots of program performance to help teams track progress and adjust plans.
- **Fundraising insights:** Analyze donor trends and volunteer engagement to inform campaign planning and outreach.

Data insights & reporting | Analyst agent

Starter scenario – declarative agent plus knowledge

1. Activate the Analyst agent

Implementation step: Activate the analyst agent in Microsoft 365 Copilot Chat to begin uncovering insights from your data. In this case, we'll use it to support leadership teams in evaluating KPIs and making evidence-based decisions.

 Agent template with Microsoft 365 Copilot Chat

Example question: "Can you help me summarize our volunteer hours and donations for the last quarter?"



2. Define the report's purpose & audience

Start by explaining why you're creating the report and who will be reading it. This helps the agent shape the content to match the tone, level of detail, and format that's most appropriate. For example, a board update might need a high-level summary, while a team report might include more detail.

 Agent template with Microsoft 365 Copilot Chat

Example questions: "I need to prepare a short update for our board members showing how our programs are performing."



Personas



Program Coordinator



Grant Manager

Starter scenario – declarative agent plus knowledge

3. Gather key data points

Ask the agent to help you collect the most important numbers that show your impact. This might include how many people you served, how many hours volunteers contributed, how much money was raised, or how many events were held.

 Agent template with Microsoft 365 Copilot Chat

Example questions: "Can you list how many people we served and how many hours volunteers contributed this quarter?"



4. Visualize the impact with a heatmap

Clarify the core objective or metric you want to explore—whether it's academic progress, attendance trends, or staff performance.

 Agent template with Microsoft 365 Copilot Chat

Example questions: "Can you create a heatmap showing volunteer hours, donations, and people served over the last 6 months?"



5. Finalize & format for sharing

Prepare the content for different platforms and finalize for scheduling. The agent tailors content for platform-specific best practices and character limits.

 Agent template with Microsoft 365 Copilot Chat

Example questions: "Can you format this summary for a slide I can present at the board meeting?"



Measuring business value: Analyst agent

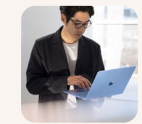
Approach: Empower nonprofit staff to interpret program data and turn it into clear, visual summaries using the Analyst agent. By leveraging Microsoft AI technologies, the agent helps users understand trends, generate heatmaps, and prepare reports for stakeholders—reducing manual effort, improving data confidence, and supporting evidence-based decision-making.

- Helps non-technical users interpret and present data clearly.
- Reduces time spent on manual reporting and formatting.
- Supports faster, more consistent impact reporting across teams and audiences.

Personas



Program Coordinator



Grant Manager

Starter scenarios – declarative agent + knowledge

Personas

Program Coordinator



Key process KPIs

- ✓ Time saved compiling volunteer activity reports
- ✓ Number of reports generated using AI support
- ✓ Increase in use of visual summaries (e.g., heatmaps) in team materials



Functional KPIs

- ✓ Reduction in time spent formatting and editing reports
- ✓ Volunteer hours reported per program or event
- ✓ Frequency of data-driven insights included in team updates

Advanced scenarios – declarative agent + knowledge + actions

Personas

Grant Manager



Key process KPIs

- ✓ Number of stakeholder-ready reports produced
- ✓ Frequency of data-driven decision-making in leadership meetings
- ✓ Reduction in external consultant hours for reporting task



Functional KPIs

- ✓ Number of reports formatted for board/funder use
- ✓ Integration of multiple data sources into a single report
- ✓ Number of automated visual summaries generated (e.g., heatmaps, dashboards)

Scenario overview: Researcher agent

Researcher agent

Goal

Help fundraisers obtain quick and clear answers when speaking to potential donors. The Researcher agent draws on internal data (for example donation history, campaign performance, CRM notes) and external insights (publicly available information on prospective donors) so that fundraisers can feel confident, provide helpful information promptly, and run campaigns more smoothly.



Personas



Street
Fundraisers



Fundraising
Manager

Opportunity area – key functional KPIs that agent will contribute to



Enhanced fundraiser confidence

Fundraisers can easily get accurate information, helping them have better conversations with potential donors and increasing the chances of donations.



Increased donor trust & engagement

Quickly knowing important details about donors and campaigns builds trust and helps fundraisers have more meaningful conversations.



Efficiency on-site

Saves fundraisers time spent looking up answers, allowing them to speak to more people and use their time effectively.

Example scenarios where agent can assist...

- What's the latest impact of this campaign?
- Has this person donated to us before?
- How can this person make a donation today?
- What recent successes or important updates should I mention to donors?
- Have we had any recent contact or noted preferences for this person?
- List upcoming events or publications related to this donor's interests that we might reference in our engagement.

Fundraising | Researcher agent

Starter scenario – declarative agent plus knowledge

1. Activate the Researcher agent

Implementation step: Activate the Researcher agent in Microsoft 365 Copilot Chat to begin gathering insights on prospective or existing donors. The agent can draw on internal CRM records, SharePoint documents, and permitted external sources.



Example question: "Can you help me gather background on this donor from our CRM and any notes in SharePoint."



2. Define research purpose & audience

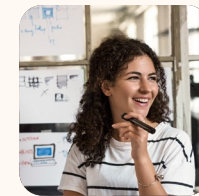
Explain why you are researching this donor and who will read the output. This helps the agent shape tone, level of detail, and format. For instance, preparing a briefing for a major donor meeting requires a concise summary with key talking points.



Example questions: "Summarize their giving history, past engagement, and recent communications."



Personas



Street Fundraisers



Fundraising Manager

Starter scenario – declarative agent plus knowledge

3. Gather key donor data points

Ask the Researcher agent to locate and collate data such as donation history by period, event attendance records, volunteer involvement, notes on previous interactions, engagement scores, or segments.



Example question: "List this donor's giving history over the past five years, showing amounts per year and dates of major gifts."



4. Finalize and format for sharing

Ask the Researcher agent to format the summary and any visuals into a specific medium: For example, a slide deck slide, a Word briefing document, an email draft, or a CRM note.



Example questions: "Generate a short narrative paragraph for our intranet post on donor engagement trends, including the chart, and schedule it for publication."

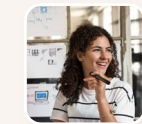


Measuring business value of AI: Researcher agent

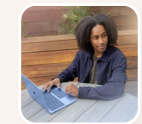
Approach: Improve donor research efficiency and enrich donor interactions by using the out-of-the-box Copilot Researcher agent. By leveraging Microsoft AI technology and existing Microsoft 365 data (CRM via Microsoft Graph, SharePoint, OneDrive, Teams) plus built-in web research, fundraising teams can significantly reduce manual data searches, quickly obtain donor insights, and enhance overall campaign performance. Provides quick access to campaign and donor data.

- Provides quick access to donor profiles, giving history, and related notes
- Reduces manual effort for fundraising teams through AI support
- Enhances donor engagement through personalized, well-informed interactions

 **Personas**



Street Fundraiser

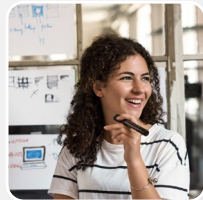


Fundraising Manager

Starter scenarios – declarative agent + knowledge

Personas

Street Fundraiser



Key process KPIs

- ✓ Instantly answer fundraiser questions using SharePoint and public website data
- ✓ Significantly reduce manual information searches by fundraisers
- ✓ Enable quick, reliable responses to common donor inquiries



Functional KPIs

- ✓ Improve fundraiser confidence through quick access to accurate campaign information
- ✓ Reduce the time spent by fundraisers looking for answers during donor interactions
- ✓ Increase the consistency and quality of donor communications

Advanced scenarios – declarative agent + knowledge + actions

Personas

Fundraising Manager



Key process KPIs

- ✓ Enable instant CRM access for donor history and details, covering thousands of donor records
- ✓ Provide real-time campaign performance insights to support proactive decision-making



Functional KPIs

- ✓ Achieve real-time access to donor histories, including previous donation amounts and dates
- ✓ Reduce manual logging time through CRM integration
- ✓ Increase targeted donor interactions, supporting campaign

Transform nonprofit operations

Support your IT, HR, operations, and finance teams



Scenario overview: Budget agent

 Built with Copilot Studio



Goal

Make it easier for teams to track budgets, manage expenses, and reconcile invoices. By automating routine finance tasks, teams can save time, reduce errors, and get a clearer picture of how their funds are being used.



Personas



Budget Manager



Finance Team

Opportunity area – key functional KPIs that agent will contribute to



Operational efficiency

Take the hassle out of financial administration by automating things like entering and matching invoices with purchase orders. This reduces the chance of mistakes and helps teams stay on top of budgets and approvals without needing to chase paperwork.



Enhanced budget performance

Give teams a clearer view of how funds are being spent so they can make better decisions. With up-to-date insights, it's easier to plan, avoid overspending, and make sure money is being used in the most effective way possible.



Improved communications & insights

Keep everyone on the same page by bringing all the financial data together in one place. Easy-to-understand dashboards and reports help fundraising and finance teams work together and make confident decisions based on accurate information.

Example scenarios where agent can assist:

- Show outstanding POs that are nearing their limit.
- Generate a reconciliation report for agency expenses this month.
- Tracking budget spend.
- List recent invoices that may be incorrectly allocated.
- Summarize the financial performance year-to-date.

Cross-team | Budget agent

Starter scenario – declarative agent plus knowledge

1. Create a Copilot agent

Implementation step: Use Agent Builder in Copilot Studio to create a simple chat-based agent that staff can use to view invoice and budget data. Add Excel files in SharePoint as knowledge base.



Example prompt to build agent: "Create an agent that helps the finance team upload and check fundraising invoices and track spend using Excel data."



2. Budget and invoice queries

Staff can conversationally query budgeting status, invoice reconciliation details, PO statuses, and outstanding financial tasks.



Example questions: "Show me patterns in recent invoice approvals." or "Forecast budget utilization for the next month."



Personas



Budget Manager



Finance Team

Advanced scenarios – declarative agent plus knowledge and actions

3. Add Finance System connector

Implementation Step: In Copilot Studio, add a connector to your Finance System (e.g., Agresso or similar). Create an action that lets the agent check discrepancies, reconcile budget data, or pull spend history.



Example questions: "Identify discrepancies between recent invoices and PO limits." or "Reconcile current month's agency spend."



4. Strategic financial insights

Ask the agent to help surface spending trends or proactive insights. This helps budget managers view spend versus budget or analyze patterns.



Example questions: "Provide a summary of fundraising spend versus budget this quarter." or "Analyze spending patterns for fundraising events."



5. Historical budget and invoice analysis

The agent will surface historical records by searching year-over-year data, allowing the finance team to ask questions about past spend, trends, and invoice history without needing to run reports manually.



Example questions: "Show year-over-year expense trends." or "Identify previously misallocated invoices from last year."

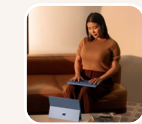


Measuring business value: Budget agent

Approach: Use Copilot agents to take the pressure off any teams that manage a budget by automating processes, invoice reconciliation, and expense tracking. Give teams quick access to insights and financial information through natural conversations—making it easier to stay on top of spending and plan ahead with confidence.

- Cuts down manual work and reduces errors in processing invoices and budgets
- Makes it easier to track spending and spot issues early
- Supports better planning and decision-making with real-time and historical insights

 **Personas**



Budget Manager




Finance Team

Starter scenarios – declarative agent + knowledge

Personas

Finance Team




Key process KPIs

- ✓ Automate manual reconciliation processes involving multiple invoices and PO numbers
- ✓ Reduce manual workload equivalent to multiple staff hours weekly
- ✓ Enable rapid conversational access to budget and invoice data




Functional KPIs

- ✓ Significantly reduce time spent manually entering and reconciling invoices
- ✓ Increase visibility into budget utilization, avoiding overspend
- ✓ Improve responsiveness to budgeting queries and financial data requests
- ✓ Ensure financial records and claimed gifts are accounted for

Advanced scenarios – declarative agent + knowledge + actions

Personas

Budget Manager




Key process KPIs

- ✓ Proactively reconcile budget discrepancies and monitor spending against an annual budget
- ✓ Facilitate strategic budget decisions with real-time analytics from Excel and Agresso integration
- ✓ Automate advanced financial insights and spending pattern analysis



Functional KPIs

- ✓ Immediate detection and correction of budget discrepancies
- ✓ Enhanced strategic budget management through conversational access to integrated financial data
- ✓ Improved long-term financial planning supported by accurate historical expense and invoice analysis

Scenario overview: Call Auditing agent

 Built with SharePoint agents



Goal

Simplify and improve how calls are monitored. By using AI to listen to calls and highlight key issues, organizations can save time, stay on top of issues, direct callers to more immediate assistance, and learn from conversations more effectively.



Personas



Call Center Staff



Operations Manager

Opportunity area – key functional KPIs that agent will contribute to



Operational efficiency

Remove the need for manual selection and listening of calls by automating the process. This helps teams focus on higher-value work instead of routine checks, saving time and reducing the risk of missing issues.



Enhanced relationship building

Use real-time speech analytics to spot patterns—like common questions, hesitations, or concerns—that help improve training and support for fundraisers. This can directly support better conversations and stronger relationships with potential supporters.



Improved communications & insights

Turn call recordings into useful, visual reports that help decision-makers act quickly. With clearer insights into supporter experiences, organizations can shape their approach, spot opportunities to improve, and better plan future campaigns.

Example scenarios where agent can assist:

- Show me call logs for this week.
- Upload call recordings from today's outreach.
- List calls that mentioned escalations today.
- What are the top concerns mentioned this month?
- Summarize recent feedback.

Cross-team | Call Auditing agent

Starter scenario – declarative agent plus knowledge

1. Create a Copilot agent

Implementation step: Navigate to your SharePoint site and folder where call audit files are stored and click "Create Copilot Agent." Click "Edit Agent" to update the agent image.



2. Add custom instructions

Implementation step: In the Edit Agent screen, scroll to "Instructions" and enter guidance that tells the agent how to respond.



Example prompt to build agent: "You are a helpful assistant for the call center compliance team. Use the documents in this folder to answer questions about call audits, compliance issues, flagged calls, and trends. Do not guess if information is not in the files, only respond based on the content available."



Personas



Call Center Staff



Operations Manager

3. Conversational compliance detection

Staff use the agent to proactively identify potential compliance breaches or problematic trends through conversational queries.



4. Supporter insights

Enables staff to conversationally query demographic data insights stored in SharePoint.



Example questions: "Summarize feedback from recent welcome calls." or "What were the most common support issues raised last week?" or "How has caller satisfaction changed since the last campaign?"



Measuring Business Value: Call auditing agent

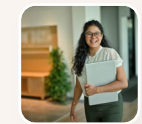
Approach: Use SharePoint agents to support nonprofit teams by simplifying how they review constituent calls, understand needs, and respond with care. With intuitive tools and real-time insights, staff can focus more on delivering impact and less on administrative tasks.

- Save time by reducing manual call reviews and note-taking
- Support staff with tools that highlight key constituent concerns and trends
- Learn from interactions to improve services, outreach, and engagement

 **Personas**



Call Center Staff



Operations Manager

Starter scenarios – declarative agent + knowledge

Personas

Call Center Staff



Key process KPIs

- ✓ Automate review of approximately 20,000 constituent calls annually
- ✓ Reduce time spent on manual analysis and documentation
- ✓ Provide quick access to constituent feedback and call summaries



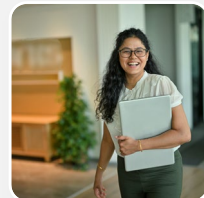
Functional KPIs

- ✓ Free up staff time to focus on direct constituent support
- ✓ Improve responsiveness to constituent needs and concerns
- ✓ Make interaction data easier to access and share across teams

Advanced scenarios – declarative agent + knowledge + actions

Personas

Operations Manager



Key process KPIs

- ✓ Enable proactive identification of constituent needs and service gaps
- ✓ Use real-time sentiment and demographic insights to guide outreach and program design
- ✓ Leverage historical data to inform strategy and improve service delivery



Functional KPIs

- ✓ Quickly identify and resolve service issues to reduce risk
- ✓ Boost team effectiveness with conversational access to constituent insights
- ✓ Support strategic planning with accurate, accessible trend data

Ready to begin your
agent-building journey?



Explore agents tailored to support your nonprofit

Microsoft offers a range of agents in Microsoft 365 Copilot Chat, Microsoft 365 Copilot, and pay-as-you-go that you can start using immediately—deploy them as-is or tailor them to your needs

Microsoft 365 Copilot Chat agents (free tier)

Best for: Lightweight, public-data tasks

Billing: Free for all Microsoft 365 customers.

Includes: Agents available at no additional cost and are grounded in public data

Example of pre-built agents:

- **Writing Coach:** Helps with content creation, translation, tone, grammar
- **Career Coach:** Provides career development suggestions, learning plans, skills gap analysis
- **Learning Coach:** Breaks down complex topics into digestible summaries
- **Idea Coach:** Facilitates brainstorming sessions with creative exercises and feedback
- **Prompt Coach:** Helps to write better prompts for Copilot by analyzing goals and context

[Learn more about free, pre-built agents](#)

Microsoft 365 Copilot agents (licensed tier)

Best for: Productivity and collaboration with tenant data

Billing: Included with a paid, Microsoft 365 Copilot add-on license.

Includes: Full access to Copilot in Word, Excel, Outlook, Teams, and PowerPoint, plus embedded agents and tenant-grounded chat.

Example agents:

- **Researcher:** Synthesizes information and helps with brainstorming and creation
- **Analyst:** Transforms complex data into insights and visualizations
- **Facilitator:** Takes notes, summarizes discussions, and moderates Teams meetings
- **Interpreter:** Provides real-time speech-to-speech translation in Teams meetings

[Learn more about Microsoft 365 Copilot pricing](#)

Pay-as-you-go agents (usage-based tier)

Best for: Advanced, custom workflows and orchestration

Billing: Based on consumption; requires an Azure subscription and billing policy setup in the Microsoft 365 Admin Center.

Includes: The ability for users to create AI agents; those agents that access internal data or use advanced orchestration may incur usage-based charges.

Example agents:

- Custom agents built in Copilot Studio
- Agents that use SharePoint or Graph Connector content
- Autonomous agents for complex workflows

[Learn more about Microsoft 365 Copilot pay-as-you-go pricing](#)

Start your agent journey today

Get started with Microsoft 365 Copilot and Microsoft Copilot Studio

Interested in getting started? Boost productivity and amplify creativity with [Microsoft 365 Copilot](#), your AI assistant for work, now available to eligible nonprofits for \$25.50 (USD) per user, per month with an annual subscription and billing cycle (includes customization and extensibility through Microsoft Copilot Studio). Build your own copilots with Microsoft Copilot Studio standalone, available to nonprofits at a 75% discount at \$50 (USD) per organization for 25,000 messages per month. You can buy now or connect with our team in the following ways:

- [Sign in to the Microsoft admin center to add Copilot](#) if you have an existing Microsoft 365 business plan. Refer to this [step-by-step guide](#) for nonprofits to change your billing account type to procure Microsoft 365 Copilot.
- Fill out our [contact us form](#) and a Microsoft Tech for Social Impact representative will contact you and answer any questions you have.

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