20 BEST WAYS TO USE COPILOT FOR NONPROFIT DEVELOPMENT DIRECTORS

You are often one person carrying the revenue goal for the whole organization. These 20 prompts use **Microsoft 365 Copilot grounded in your own donor data, email and files**, so more of your week goes to donor relationships and less to the work that surrounds them.

Grounded in your work, not the open web
Licensed Microsoft 365 Copilot reasons over your real content. Free chatbots can't see any of it.

- **Your files** — SharePoint, OneDrive, Word, Excel
- **Your email & chats** — Outlook and Teams threads
- **Your meetings** — Recaps, decisions, commitments
- **Your permissions** — It only sees what you can already see

NEW TO COPILOT? Start with 2, 3 and 8 — they pay off on day one and need nothing set up first.

Know Your Donors Better — 5 PROMPTS — EXCEL · OUTLOOK · POWERPOINT

1 Segment Your Donor File
EXCEL

Turn a flat export into segments you can actually build strategy around.

Try: *"In this giving workbook, segment donors by recency, frequency and gift size, and summarize each segment."*

2 Spot Who Is Slipping Away
EXCEL

Catch lapsing donors while there is still time to do something about it.

Try: *"Which donors gave in the last three years but not this year? Group them by giving level and last gift date."*

3 Prep for a Major Gift Meeting
OUTLOOK

Walk in knowing the whole relationship, not just the last email.

Try: *"Prepare me for my meeting with this donor: recap our email history, their giving and the interests they have mentioned."*

4 Build a Moves Management Plan
WORD

Turn a prospect list into a sequenced plan with owners and next steps.

Try: *"Draft a 12-month cultivation plan for our top 20 prospects with stages, touchpoints, owners and timing."*

5 Brief the Board on a Prospect
POWERPOINT

Give a board member everything they need before they make an introduction.

Try: *"Build a 3-slide prospect brief: relationship history, giving capacity signals, our ask and the board member's role."*

Write What Donors Actually Read — 5 PROMPTS — WORD · OUTLOOK

6 Draft the Annual Appeal
WORD

Get a full appeal draft built from your own program results.

Try: *"Draft our year-end appeal using this program impact summary, with a clear ask and a specific beneficiary story."*

7 Personalize Without Rewriting
OUTLOOK

One appeal, tailored to each segment, in a single pass.

Try: *"Rewrite this appeal into four versions for lapsed donors, monthly givers, first-time donors and major donors."*

8 Write Thank-Yous That Retain
OUTLOOK

Make the acknowledgment the start of the next gift, not the end of the last one.

Try: *"Draft a warm thank-you for this first-time donor that names the impact of their gift and invites a next step."*

9 Turn Results into a Story
WORD

Convert an outcomes report into language a donor will finish reading.

Try: *"Turn this outcomes summary into three short donor-facing impact stories, each under 150 words."*

10 Build the Case for Support
WORD

Get the foundational fundraising document written once and reused everywhere.

Try: *"Draft a case for support from our strategic plan and impact data: the need, our approach, results and the ask."*

Run Campaigns & the Board — 5 PROMPTS — EXCEL · POWERPOINT · TEAMS

11 Track Campaign Progress
EXCEL

Know where you actually stand against goal, by channel and by segment.

Try: *"From this campaign workbook, show progress to goal by channel and segment, and flag where we are behind pace."*

12 Build the Board Report
POWERPOINT

Turn the fundraising numbers into five slides your board will understand.

Try: *"Build a 5-slide development report: progress to goal, donor retention, pipeline and where we need board help."*

13 Plan the Giving Day
WORD

Get a full campaign calendar instead of a blank content plan.

Try: *"Build a two-week giving-day plan: email sequence, social posts, matching-gift messaging and staff assignments."*

14 Prep Board Members to Ask
WORD

Give reluctant board members words they can actually use.

Try: *"Draft talking points and a one-page leave-behind for board members making introductions on our behalf."*

15 Recap the Development Committee
TEAMS

Turn the meeting into decisions and owned follow-ups in seconds.

Try: *"Summarize this development committee meeting into decisions, action items with owners, and what goes to the full board."*

Delegate the Heavy Lifts — 5 PROMPTS — COPILOT COWORK

16 Build the Full Campaign Kit
COWORK

Hand off an entire campaign, not a single email.

Delegate: *"Build our spring campaign kit: case for support, four-email sequence, social calendar and a gala deck."*

17 Research Your Next 20 Prospects
COWORK

Get a cited prospect brief without a week of desk research.

Delegate: *"Research 20 foundations and family funds giving to our cause in our region, with fit, range and contact path."*

18 Assemble the Annual Report
COWORK

Turn a year of results into the donor-facing report you never have time for.

Delegate: *"Build our annual report: impact narrative, financials summary, donor recognition list and a designed layout."*

19 Run a Retention Analysis
COWORK

Find out where you are losing donors and what it is costing you.

Delegate: *"Analyze three years of giving data for retention by segment, identify where we lose donors and recommend fixes."*

20 Put Stewardship on a Schedule
COWORK

Make sure no gift goes unacknowledged and no donor goes quiet.

Delegate: *"Every week, draft acknowledgments for new gifts and flag major donors we have not contacted in 90 days."*

MORE WAYS DEVELOPMENT TEAMS ARE USING COPILOT

Write the Grant Cover Letter
Adapt your case for support into a funder-specific introduction.

Draft Event Follow-Ups
Turn an attendee list and event recap into personalized next-step messages.

Build a Monthly Giving Pitch
Make the recurring-gift ask that most nonprofits never get around to.

Prep the Ask Conversation
Rehearse objections and responses before a major gift meeting.

A note on donor data: donor records are confidential even though they are not covered by HIPAA or FERPA. Work from segments and aggregate giving data rather than pasting individual records or wealth-screening reports into a prompt, keep this work inside your organization's licensed, tenant-protected Copilot rather than a consumer chatbot, and be ready to tell donors how you use AI — transparency is now an expectation, not a courtesy.



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Repost