Nonprofit CDM Community

How can we leverage the Nonprofit CDM?

February 18th, 2021
Who is Avanade?

Avanade is the leading provider of innovative digital and cloud services, business solutions and design-led experiences delivered through the power of people and the Microsoft ecosystem.

Best of Accenture & Microsoft

Created by Accenture and Microsoft, Avanade brings the best in strategy and technology to unlock more value from your IT investments and maximize business results.

We bring together the world’s largest community of experts on Microsoft-based solutions with 75,000+ skilled professionals across Avanade and Accenture.

The right alliances
We don’t have hundreds of alliances; we have the ones we need. We deliver value through our close relationships with:

- LUMA INSTITUTE™: Our design thinking partner
- Scrum.org: Our agile delivery partner
- MIT CISR: Our digital transformation research provider
Our global footprint...

**Provides the agility, cost efficiency and diversity of skills that today’s businesses demand.**

Our centres comprise onshore, nearshore and offshore sites. They’re located in 11 countries across the world, from India and the Philippines to Argentina and beyond. This “follow-the-sun” approach means our support is always on, wherever and whenever you need us.
Technology for Social Good

Through Technology for Social Good, we will accelerate the delivery of impactful technology and relevant solutions to nonprofit organizations around the world.

Those solutions will represent tailored IP designed for nonprofits to enable these deserving organizations to streamline their work and better serve their communities.

Our Mission: To become the trusted partner to nonprofit organizations and the social sector, to bring about systemic change through the strategic delivery of Microsoft technologies on a global scale.

By being stronger together

Through our solutions
We will envision and innovate repeatable IP solutions for the social sector—building upon Microsoft’s Common Data Model for Nonprofits, enabled using Azure, O365 and D365 technology.

“We know that many nonprofit organizations face systemic challenges in leveraging technology” said Pamela Maynard, Chief Executive Officer at Avanade. “Which is why we couldn’t be more excited to be partnering with Microsoft to accelerate the development of IP solutions to address the most pressing nonprofit challenges.”
Avanade Solution for Nonprofits

Creating impact in the social sector through the power of technology

At Avanade, our purpose is to make a genuine human impact. Through our Tech for Social Good partnership with Microsoft, we are committed to helping nonprofit organizations and the social sector fulfill their missions through digital transformation.

We are proud to bring our 20+ years of experience helping organizations across industries and sectors to help nonprofits unlock digital innovation solutions with current and emerging Microsoft digital technologies that make a human impact and be allow them to be Future-Ready. Now.

MARKET CONTEXT

Most nonprofits recognize the need for digital transformation, but years of underfunding in technology resulting in a significant amount of technical debt has made the journey to being “future ready” daunting.

- Widening gap between available resources and growing needs
- Many organizations don’t know where to start
- Increasing pressure for organizations to be more transparent
- Most nonprofits are not strong in change management
- High level of technical debt – highly customized & outdated systems
- They must improve both processes and constituent experience

BUSINESS OUTCOMES WE DRIVE

- Increase impact of every donor dollar
- Improve beneficiaries reach and impact
- Increase donor retention and loyalty
- Deepen constituent relationships

WHAT WE’RE OFFERING

Avanade Solution for Nonprofits:
- Digital Sales & Service (CRM)
- Finance & Operations Services (ERP)
- Talent (HR)
- Data Platform Modernization – Cloud Migration
- Digital Ethics

CLIENTS

- SOS Children’s Villages International
- Degrees of Change
- Goodwill
- Canadian Red Cross
Avanade's unique solution suite helps nonprofit organisations digitally transform and accelerate their social impact. Partnering with Microsoft’s Tech for Social Impact, Avanade has developed nonprofit solution modules, built on Microsoft’s Nonprofit Common Data Model, tailored to the most specific needs of the sector.

Avanade’s solution enables the connection of program delivery, funding, grant management, and results measurement that will allow nonprofit organisations to gain much greater insight into program effectiveness, increase transparency and, over time, increase the impact of their mission.

Avanade is a trusted partner to nonprofits for delivering Microsoft Technologies globally. As Microsoft’s lead SI partner we can scale and establish a global footprint in the nonprofit market, providing repeatable and affordable technology services for IT strategy, delivery and training. Through our projects, we empower nonprofits to advance their missions through the power of technology.

**KEY CONTACTS**

- Almin Surani
  Almin.Surani@avanade.com
- Sheila Killeen
  Sheila.R.Killeen@avanade.com
- David Hisler
  David.Hisler@avanade.com
Nonprofit Accelerator

Common Data Model for Nonprofits: A data schema made up of nonprofit data entities and attributes that provides a foundation to build solutions. Provides schema across fundraising, constituent management, awards management, case management, project management & program design, delivery framework, measurement, and administration. The data model can be installed as any other solution from Microsoft AppSource and it can be browsed on GitHub.

Partner starter applications: Nine sample applications and two Power Apps (Nonprofit Program Design and Nonprofit Operations Toolkit) that can be used to further solution innovation for nonprofits.

Interoperable Data Standards: Data schema, sample apps, and Power Apps all developed and informed by a cross-collaborative group of industry thought leaders and subject matter experts.

More: NonProfit Accelerator
More: NPO CDM Release Documentation
More: CDM Entity Browser
Nonprofit Model in Dynamics 365
Future-proofing the application

**Nonprofit Model in Dynamics 365**

**Customer-specific functionality**
For instance, localization requirements

**Solutions, Extensions and Best practices**
Builds logic on Microsoft Nonprofit data model

**Nonprofit Accelerator and Common Data Model for Nonprofits**
Adds Nonprofit-specific entities, fields, forms, and sample apps

**Standard Dynamics functionality**
The core of the application stays the same

---

**AVANADE NONPROFIT SOLUTIONS**

**NONPROFIT MODEL**

**STANDARD**

---

©2019 Avanade Inc. All Rights Reserved. <Highly Confidential>
What is co-creation and what does that mean for our clients?

Co-creation is an ability to work with Avanade (often in conjunction with Microsoft) to develop assets, artefacts and IP that support the Nonprofit Sector.

It forms part of our value exchange as we look to invest funds with our clients to leverage existing work and extract relevant artefacts.

We look for clients who:

- Have a need or requirement that is not yet solved by existing solutions
- Want to work with us to build and share to benefit the sector
- Can provide specific non-profit advice or guidance to contribute
- Will gain benefit as part of current or future project
- Understand that the IP harvested (that fits into our solution roadmap) offsets the investment we make in your project and will be owned and maintained by Avanade.
Avanade helps UNICEF NL to increase the effectiveness of fundraising to support children around the globe

**Situation**
The children's rights organization's goal is to support children in all countries; hence **fundraising is their life blood**. The funds are needed to deliver life changing programs around education, water and nutrition and vaccinations.

The ability to **engage and build relationships** with private/business donors and volunteers is essential, as the goal is to transform donors to lifetime supporters.

The client asked Avanade to help them **envision what their customer experience could look like**, such that they could reach their growth goal ambitions.

And it is UNICEF's vision that investments in ICT solutions are shared as much as possible within the NGO community, optimizing donations in the sector and enabling NGO supporters to engage in their preferred channels with content of their interest, optimizing the customer experience to create sustainable impact for every child.

**Solution**
The client needed help to undergo a business transformation by equipping and enabling their workforce to feel empowered. UNICEF's innovative use of Sentensor enabled the change enablement activities for the business change. And is reusable in the solution.

Through its Tech for Social Good business, Avanade brought deep knowledge and expertise of the Microsoft stack to **implement a MS D365 solution, building on the Nonprofit Accelerator and Common Data Model for Nonprofits**. The solution will:

- Track donations and allow all departments access to the same set of data.
- Enable clients to move from big blanket campaigns to niche micro campaigns to increase supporter loyalty and engagement.
- Enhance user adoption with the familiarity of Microsoft products.
- Remove manual processes from the system, enabling the client to focus on value-add activities with minimal disruption.

**Microsoft TSI Value Map**
The client implementation focuses on many areas of the Microsoft TSI Value map including:


**Results**
Avanade’s Fundraising and Constituent Insights solution is expected to:

- Gain a **360-degree view of donors** and volunteers based on interaction and insights from all data sources.
- Raise **more funds with precise segmentation and AI-driven insights** to reduce churn in monthly subscriptions and increase growth in incidental supporters.
- Increase involvement with **personalized, 2-way communications** based on donor interests.
- Provide **greater financial insights** (including donor giving.)
- Provide a scalable solution built on one platform, with one partner to lower costs over time—and one which is shareable across the entire sector.

The Avanade team has rapidly developed UI, Workflows, and business logic in these areas such that the solution, which leverages the Dynamics 365 Nonprofit Accelerator and CDM can enable interoperability to accelerate impact.
The Basic Flow

Promoter

Donations
Leads
Telemarketing
Events
Promoter

Donation Service

Data Entry Point
Validations

D365 CE

Donation Mgmt.
Partnership Mgmt.
Volunteer Mgmt.

D365 F&O

General Ledger
Budgets
Bank Processes
Banking Engine

D365 Marketing

Program Mgmt.
Campaign Mgmt.
Journey Automation
Digital Channels

Engagement Insights

Data unification
KPI's
Segmentation
Intelligence

Power Platform

Power BI
Power Automate
Reports
Marketing
Imports/Exports

Donation Mgmt.
Partnership Mgmt.
Volunteer Mgmt.

Data unification
KPI's
Segmentation
Intelligence

Program Mgmt.
Campaign Mgmt.
Journey Automation
Digital Channels

Telemarketing
Letters
SMS
...
TSG Build and Co-Invest in a valuable Roadmap for NPO’s

Avanade Nonprofit Retail Solution
PowerApps Retail/POS with Inventory Management

Avanade Grant Making Solution
• Comprehensive end to end grant making
• AppSource in July 2020

Avanade Fundraising and Constituent Insights
Fundraising, Donation Management, Marketing, Constituent Insights, Volunteer Management, and F&O

Nonprofit Finance & Operations
• Plan International
• IFRC
• SOS
  - Funds/Budget/Sub-Award

©2020 Avanade Inc. All Rights Reserved.