

# Nonprofit leader's guide to moving to the cloud with confidence

How to adopt a cloud-based business management solution to unlock insights, adapt faster, collaborate better, and further your mission

 Microsoft Dynamics 365



# This information is for you if...

- You are a nonprofit leader who wants to learn more about the benefits of cloud migration.
- You are an nonprofit leader looking to understand business applications in the cloud.
- You are ready to embrace digitization but need a framework to manage the journey.
- You are looking for next steps to drive your organization's digital transformation.



Estimated reading time: <15 minutes



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# Introduction

## Are you agile enough to keep pace with the ever-accelerating speed of today's world?

As a **nonprofit leader**, you have multiple priorities, from finding and retaining talented workers, to growing the funding pipeline and financial health of your organization, to blazing new trails and delivering on your mission. Given the fast pace of our world these days, it's hard to stay ahead... even more so if your organization is stuck using data and process silos that don't have the visibility or flexibility to predict or adapt to disruption.



**We've changed our way of working. We can now see problems coming in real time."**

*- [Georges Kettaneh, Secretary General, Lebanese Red Cross](#)*

## The speed of digital business transformation is the new competitive differentiator

Even before 2020, nonprofits were beginning to embrace digital transformation. But the pace increased rapidly as a response to the global pandemic. With remote work mandates, funding constraints, and consumers turning to online channels during lockdown, nonprofits that didn't already have secure digital access and processes in place deployed workable cloud solutions faster than they thought possible.

In fact, a McKinsey Global survey of executives from late 2020 found that companies of all sizes had accelerated their digital transformation by three to four years.<sup>1</sup>

With nonprofit organizations realizing the need to continuously reinvent themselves, they'll need a cloud-based business management solution that goes beyond cost savings and remote work benefits. The next step is to accelerate digital transformation, so nonprofit leaders can elevate employee, supporter, board member, and volunteer experiences, while keeping up with our changing world.

<sup>1</sup> [COVID-19 digital transformation & technology | McKinsey](#)



# The cloud advantage

For years the cloud has provided a critical advantage for addressing top nonprofit priorities. Now, cloud capabilities are becoming even more important for expanding beyond core operational needs and helping organizations move faster, be more resilient and adaptable to change, and strengthen security. Cloud technology is the key to completely reimagining the model, across staff, program, marketing, finance, and operations experiences.

It's time to look beyond enabling remote work, and take the next step in your digital transformation journey. The cloud enables organizations to:

## Improve security, privacy, and reliability

Sensitive data, including donor information, is stored in highly secure, state-of-the-art datacenters, where it's available to the right people whenever it's needed, with virtually no downtime.

## Enable scalability, flexibility, and easier on-boarding

Nonprofits that embrace cloud technology can grow without costly changes to IT infrastructure. That includes the ability to quickly activate and deploy new users from nearly anywhere, or defining and enabling new service delivery models.

## Free up resources to work on more strategic tasks

Improve productivity across your organization by reducing the time and complexity associated with managing hardware and software. This allows IT (or anyone taking on an IT role) to focus on strategic priorities and optimizing business processes rather than repair and maintenance.

## Reduce the cost of maintaining hardware

Reduce time and money spent on infrastructure refreshes, major software and hardware updates, utility costs, back-ups, and maintenance by shifting to the cloud.

## Always be current and compliant

Cloud-based business software is updated automatically to match the latest global regulatory standards, so cloud-enabled organizations always have the most current version and can maintain the highest standard of compliance.

## Accelerate business insights

With cloud-based business software, companies can unify disparate data sources and bring a richer understanding of their community, programs, and services through data insights and analytics.



# Microsoft Dynamics 365 Business Central is the preferred cloud-based business management solution for thousands of organizations

Now more than ever, you need to ensure your people are enabled to deliver on donor and community expectations, no matter where they are or what comes next.

**Microsoft Dynamics 365 Business Central** is a comprehensive business management solution that helps nonprofits connect their finance, development, marketing, program, and operations requirements within a single easy-to-use application. Instead of maintaining siloed data within financial, operational, and organizational systems, Business Central connects your business, offering actionable insights from real-time visibility across teams and departments.

Business Central also interacts seamlessly with the familiar Microsoft 365 productivity apps—Microsoft Word, Excel, PowerPoint, Teams, Outlook, and more. Employees can set up constituents or vendors, create quotes, and submit invoices without leaving their inbox. That means less training, faster adoption, and a quicker return on investment.

What's more, Business Central can be easily adapted and extended with available apps on the Microsoft AppSource or by using the Microsoft Power Platform to create business intelligence dashboards and easily usable applications to gather data and streamline processes. We built on our rich history in ERP solutions, evolving to Business Central from Dynamics NAV, GP, and SL.

## With Microsoft Dynamics 365 Business Central, nonprofits can:

### Grow and adapt to our changing world

Enhance your service delivery models with flexible deployment, reliability, security, and an adaptable solution that grows with you.

- **Unify your data**  
Remove information silos with one comprehensive solution that runs where you need it, offering the same user experience no matter how you deploy.
- **Be ready for growth**  
Scale and perform as you grow using modern technologies built on the Microsoft cloud, such as machine learning and AI to help you adapt to market dynamics.
- **Access built-in world-class security**  
Take control of your mission-critical data and help protect it from unauthorized access with automatic Microsoft datacenter encryption.
- **Take your organization on the go**  
Work wherever your community takes you, with full capabilities on desktop, tablet, or mobile, on premises or in the cloud, across Windows, Android and iOS devices.



**Now we can manage all the business tasks that support WWF Italia with Dynamics 365 Business Central. We're spending less time on administration and more time on conservation."**

*- Bruno Carlo Ravaglioli,  
Deputy General Director, WWF Italia*



## Unlock productivity and insights

Connect people, processes, and insights to make better decisions faster with embedded guidance, dashboards, and interoperability with familiar, business-class productivity tools.

- **Get real-time insights**  
Access business intelligence when and where you need it, with dashboards and KPIs for each user role.
- **Automate workflows and processes** Optimize performance using easy-to-create workflows, audit trails, enterprise-level security, and AI.
- **Enhance productivity with familiar apps**  
Interoperability with Microsoft 365 means people can work directly within Microsoft Outlook, Excel, Teams, and Word, using familiar tools to get their work done. Merge business data into Word, edit data in Excel, and complete quotes and invoicing directly from Outlook.
- **Respond at the speed of business**  
Get access to Business Central operations data directly within Microsoft Teams and Outlook. Easily share data and quickly address issues while you are meeting, messaging, and working.

## Increase financial visibility and performance

Simplify reporting, accelerate financial close, improve forecasting, and get real-time performance metrics while fostering compliance and security across global subsidiaries.

- **Take control of financial data**  
Better manage cash flow, bank reconciliations, fixed assets, budgeting, and project costing while shortening cycle times with the late payment-prediction extension.
- **Accelerate financial closing and reporting**  
Reduce month- and year-end closing times with connected general ledger, accounts receivable, payables, and fixed assets data. Streamline approval workflows using Power Automate.
- **Monitor financial performance**  
Use built-in reports, Excel, or Microsoft Power BI and unlimited data dimensions to get real-time cash flow, identify financial patterns, analyze trends, and improve business planning and decision-making.
- **Make more effective financial decisions**  
Connect reports, charts, and Power BI data from across finance, development, marketing, and program teams to get accurate insights and make financial decisions with confidence.

## Boost engagement and improve donor relations

Take better care of your supporters by managing the relationship management from within Microsoft Outlook.

- **Prioritize prospects based on giving potential**  
Keep track of stakeholders interactions and get guidance on the best next-best action, throughout your annual cycle.
- **Deliver on promised constituent outcomes**  
Track supporter behavior to quickly access details about giving propensity, volunteer hours, and event engagement.
- **Live up to your service promises**  
Effectively assign personnel to projects and get an overview of tasks and workloads. Keep track of agreements to deliver reliable service to your constituents.

## Looking for even more advanced fundraising solutions?

For even more advanced donor management needs, consider [Fundraising and Engagement, part of Microsoft Cloud for Nonprofit](#).



## Facilitate project success

Ensure successful project execution with planning, resourcing, tracking, costing, billing, accounting, and real-time intelligence.

- **Improve project costing and accounting**  
Better manage projects using timesheets and advanced job costing and reporting. Develop and modify detailed budgets to help ensure project profitability.
- **Optimize resource levels**  
Manage resource utilization by planning capacity. Track giving and other income against estimates and projections.
- **Drive impact with project insights**  
Get real-time business intelligence on project status, impact, and resource utilization metrics, simplifying your reporting to donors and grantors.



**By automating processes in Business Central, we save 10 hours per month on invoicing, 8 hours on banking activities like vendor payment uploads, and 12 hours on processing vendor invoice approvals.”**

*- [David Ainsley, Director of IT, Call2Recycle](#)*





# Transform with the Microsoft Cloud?

Microsoft is uniquely positioned to help nonprofits deepen their mission impact through cloud services. We have unmatched experience, having invested in building Azure over a decade, and business applications even longer, so our customers can quickly unlock the benefits of the cloud. Transform with the Microsoft Cloud—the most trusted and comprehensive cloud, so you put your people first and create meaningful change faster than ever before.

## Get collaborative with native Microsoft 365 interoperability

The entire **infrastructure you need** to run a digital organization is within the Microsoft cloud. In fact, Dynamics 365 is the only business platform that natively integrates with **Microsoft 365**—including Microsoft Word, Excel, PowerPoint, and Teams—Microsoft Azure, Azure Cloud Services, and Microsoft Power Platform, giving you **unparalleled integration** across systems and processes. What's this mean for your business? Collaborative applications deliver a new generation of ERP that will transform the way work gets done: productivity, collaboration, and process optimization are all in one solution.

## World-class security

With security a top priority, nonprofits are looking to the cloud to help protect valuable data, apps, and infrastructure. Part of the Microsoft Cloud, Microsoft Azure offers a secure cloud foundation with multi-layered, built-in security controls as well as unique threat intelligence, so organizations are **always up to date with the latest security** to protect against evolving threats. Trusted by enterprises, nonprofits, IGOs, governments, and startups, Microsoft Azure has been named a leader in five Gartner Magic Quadrants for security—delivering world-class identity protection, role-based access, encryption; and auditing and logging.

## Advanced technology

Additionally, Microsoft spends billions on **cutting-edge technologies**, such as AI. The benefits of that advanced research and development ends up in the technology inside Microsoft Dynamics 365 Business Central as well as the familiar Microsoft 365 productivity apps.

## For nonprofits

[Microsoft Cloud for Nonprofit](#) includes applications built specifically for the nonprofit sector, including Fundraising and Engagement. Leverage our vast ecosystems of partners to integrate Business Central to your Microsoft Cloud for Nonprofit—or other—solutions to streamline data sharing from fundraising all the way through to financial reporting.



**Without data, we would be blind when making decisions on where to open new stores. This solution provides new insight on our customer base and helps us reach them."**

*- [Matthias Haller, CIO and Head of IT, Salvation Army Switzerland](#)*



# Checklist for success

Evaluating new cloud technology may seem overwhelming, but it doesn't have to be. The key is pinpointing your critical workforce needs and making sure that any solution you select contains 80 percent of the functionality you require, right out of the box.

It's also important to choose a system that is compatible with your existing technology and tools. This minimizes costly customizations and potential downtime, and it ensures that your workers can get up to speed quickly and easily. A qualified partner can offer expert guidance during the decision-making, planning, and execution stages of any cloud migration initiative.

**Use this checklist to help plan for success:**

## → Define and prioritize

Take time to identify the organizational problems you want to address and the outcomes you aim to achieve. Consider the benefits across your institution.

## → Assign key roles

Be sure to get buy-in from an executive sponsor to lead the initiative and assign key roles and clear responsibilities to everyone involved.

## → Select a qualified partner

The right partner can help plan and implement your digital transformation to get maximum benefit with minimal downtime.

## → Analyze IT ecosystem

Document existing IT infrastructure and apps, including dependencies, security needs, usage, and the business context for each app. This is one area where an experienced partner can help.

## → Plan migration

Create a gameplan for which applications to migrate, how, and in what order. Calculate the total cost of ownership of the proposed plan and get buy-in from the organization's leadership.

## → Start small

Many organizations begin with "lift and shift" projects, which are simpler, cheaper, and easier to complete. Cost savings can be rolled into more comprehensive transformations over time.

## → Modernize apps

To get the full benefit of cloud-based business apps, organizations need to upgrade to cloud-native applications and architectures. This includes automatic updates for security and compliance.

## → Optimize and manage

Monitor and right-size usage to manage costs and optimize services over time.



## Take the next steps

Don't lose out because of siloed data or cumbersome, on-premises infrastructure and software. With a modern, cloud-based business management solution, you can bring together finance, development, program, marketing, and operations within a single application to get the insights needed to drive your organization forward and be prepared for what's next.

### Adapt faster

Innovate and adopt new processes faster with flexible deployment models, mobility, reliability, security, and an adaptable Microsoft cloud solution that grows with your business.

### Work smarter

Empower people to be more collaborative, more productive, and more impactful with actionable insights and interoperability to Microsoft 365, including Teams, Word, Excel, and Outlook.

### Perform better

Enable high performance with guided workflows, governance, and real-time metrics that drive continuous process optimization, streamline financial and program reporting, and improve collaboration and visibility across your institution.

**Microsoft Dynamics 365 Business Central** is a collaborative business management solution that helps nonprofits connect their finance, development, program, marketing, and operations requirements within a single easy-to-use application.

The power of Dynamics 365 is the way it connects data from within and beyond the Microsoft cloud and transforms it into actionable insights for your organization to drive more impactful results. Equipped with the right digital capabilities, you get agility in the face of change, so you can pivot complex operations nimbly and quickly to keep your operations on track and your supporters engaged for life.

Whether you are moving from Dynamics GP, NAV, SL or another traditional ERP solution, or if this is your first time looking for a business management solution, we can help you confidently move to the cloud to optimize digital workforce processes, enable remote work, and unlock the insights needed for an agile, mission-driven organization.

# Ready to make technology work for your mission?



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**Connect with a Microsoft Partner**