



PROMX



WHITE PAPER



# Microsoft technologies for Non-Governmental Organizations (NGOs)

A case study

proMX and Microsoft are convinced that innovative technologies help find solutions for even the most intimidating challenges. The digitalization of non-governmental organizations is thus of particular importance. Yet digital transformation is not just a question of technical feasibility. It is also about connecting people, processes, and technologies, enabling innovation and bringing about change. For NGOs it is thus important to approach digital transformation strategically, uncovering digitalization gaps and showing positive effects on their work.



**ENGAGE DONORS  
AND VOLUNTEERS**

Strengthen support  
and participation



**EMPOWER  
EMPLOYEES**

Increase productivity  
and creativity



**OPTIMIZE  
OPERATIONS**

Accelerate  
your mission



**INNOVATE  
FOR IMPACT**

Do more good  
from field to office

# Microsoft Technology in a Nature Conservation Organization – Implementing an industry solution based on Dynamics 365

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## About the organization:

The organization is among the biggest nature conservation associations in Germany. It has its own protective areas to safeguard biodiversity. With numerous participative events and environmental education, the organization contributes important work to protection of species and imparts knowledge for a sustainable future. Conservation research and purpose enterprise, such as the sale of birdseed, are part of the organization's activities.

## Initial situation:

Since conservation societies may not work for profit, creating reserves is legally difficult. Nonetheless, all tasks have to be accomplished with limited resources. The organizations had been using a CRM system since 2002 which offered technical support for processes surrounding fundraising, donor relations and project management. However, data quality was lacking and with time it could no longer fulfill the requirements. Due to a sharp increase in





members the existing systems was overburdened.

A first step towards digitalization was the introduction of Office 365 in 2017, which is being used by all offices and volunteers. This significantly strengthened productive collaboration within project teams and facilitated working from home during the Corona pandemic of 2020.

**Challenges:**

To be able to continue to cope with all tasks, a solution had to be found to merge the silos of different departments and to document processes for the long haul.

Donors expect transparency and experience as well as complete documentation of past processes. They want the organization to know them and take into account their wishes. If this could not be done, donors may be lost.

While resources kept getting tighter, members and donors skyrocketed. A secure and trusted IT environment had to be created.

## **Solution:**

The organization implemented an industry solution for NGOs developed by proMX AG on the basis of Microsoft Dynamics 365. The platform, consisting of Sales, Customer Service, and Marketing, covers all areas from contact management and fundraising to accounting and reporting in one solution.

With the development of a Microsoft Power App, accounting elements can be displayed directly in Dynamics 365.

## **Results:**

The solution allows fundraising to happen quicker, more automated whilst being more personalized which reduces pressure on resources. Silos were broken up and administrative effort decreased significantly. Complete documentation enable staff to react quickly to incoming donations. The system also allows for daily analysis, which had not previously been possible for the organization.



- ✓ **Time savings due to automation**
- ✓ **Organization's development reflected in IT landscape**
- ✓ **Optimized communication between departments**
- ✓ **Platform may be expanded**



## We offer a helping hand in your digital transformation

The ideal digital transformation partner is not only an expert in theory and technology but also in its customer's industry. Our consultants are familiar with the processes, priorities and challenges of different sectors. Contact us!

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