

Fundraising and Engagement

for Dynamics 365 Sales

Implementation Checklist

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The purpose of this document is to provide a list of activities that nonprofit organizations and partners should consider when implementing Fundraising and Engagement for Dynamics 365 Sales, part of [Microsoft Cloud for Nonprofit](https://aka.ms/MicrosoftCloudforNonprofit).

Typically, a nonprofit will go through Discovery, Implementation, and Adoption phases. Below are key considerations aligned by phase.

# Discovery

* It’s important to spend time evaluating whether or not Fundraising and Engagement is the right solution to address the organization’s current needs and challenges, as well as its vision for the future. The best way to do this is to spend time in discovery, walking through how the solution addresses common, day to day use cases and everyday activities. To do this, take a free [Test Drive](https://aka.ms/FundraisingandEngagementTestDriveAppSource) of the solution. The Test Drive is a read-only environment for your exploration; the [Fundraising and Engagement User Guide](https://aka.ms/FEUSERGUIDE) is a good reference to learn more about the solution along the way.
* At the heart of Fundraising and Engagement is the [Common Data Model for Nonprofits](https://docs.microsoft.com/en-us/common-data-model/nfp-accelerator) which introduces new terminology and processes. As the foundation for the solution, ensure the evaluation team members as well as subject matter experts at the organization are familiar with the Common Data Model for Nonprofits.
* While a partner is not required during the discovery phase, nonprofits may find value in working with a partner who can lend additional insight into the solution and its functionality. There are [partners](https://aka.ms/FundraisingandEngagement) prepared to support nonprofits in implementing Fundraising and Engagement.

# Pre-Implementation Readiness

* At this stage, identifying a partner to work with to implement Fundraising and Engagement is recommended. Implementing this solution will require having the right resources to guide the organization through this journey and this may require both resources from within and/or outside the organization to partake.
* Decisions will need to be made by the organization regarding the configuration of the solution to ensure it meets its needs.
* The nonprofit team will need to dedicate time to this implementation. This commitment of time may be over and above regular work expectations, particularly during key phases of the project. Moreover, with the cyclical nature of fundraising activities, there will be times of the year when supporting a project of this nature will not be feasible.

An organization should confirm how staff will manage the decision-making process and who will ultimately have sign-off authority for key project elements.

# Implementation

* Nonprofits should be prepared to share their needs, wants, and a wish list in the discovery journey with the partner. Moreover, a partner can provide guidance as to what is and is not configurable within the solution as well as where customizations begin. This helps to ensure clarity as to how the solution will address donor management and fundraising operations requirements. There are a number of [partners](https://aka.ms/FundraisingandEngagement) prepared to support nonprofits in implementing Fundraising and Engagement.
* At the core of Fundraising and Engagement is the Configuration Record, which allows the organization to tailor the system to suit its needs. It shares the same configuration tools as Dynamics 365, allowing organizations to change labels, fields, values, and the underlying business process workflows. As most nonprofits will not have worked with Dynamics 365 before, this is all new and needs to be explained in a user-friendly manner.
* Other key considerations during this stage include:

## Finance System

* Fundraising and Engagement is based on fund-accounting principles. It has its own General Ledger, which allows an organization to export data from the solution and import it into its financial system of record.
* If nonprofits want to utilize a Microsoft solution for their finance system, they can map key Fundraising and Engagement entities to Dynamics 365 Finance & Operations entities and tables or use Power Automate to integrate with Dynamics 365 Business Central.

## Payment Gateway

* Organizations should also evaluate which payment gateway option is right for them. Fundraising and Engagement integrates with Stripe, Moneris, and iATS payment gateways. These gateways provide PCI DSS v3.2.1 compliance, which enables the latest fraud prevention tools (e.g. 3D secure).
* If an organization would like to utilize an alternate payment gateway, a partner would need to develop this integration specifically for the organization. This would be considered a customization with an additional cost.

## Marketing Communications

* It’s important to discuss how the organization will communicate with constituents post-implementation and which solution best suits their communication needs.
* Dynamics 365 Marketing works seamlessly with Fundraising and Engagement. ClickDimensions and Touchdown are both managed solutions, which are deployed to a Dynamics 365 instance, and may meet an organization’s needs.
* Additional options—like MailChimp, Mandrill, and Marketo—exist if an organization deploys with Power Automate Connectors— <https://flow.microsoft.com/en-us/>.
* If organizations wish to maintain their existing marketing automation tool, they can elect to use Marketing Lists in Fundraising and Engagement as a conduit to export and feed lists into the organization’s marketing system.

## Data

* Understanding the single, or multiple, sources where an organization’s data currently resides is vital to a smooth migration.
* Key considerations involve the complexity and volume of data to be migrated, what data can remain as historical and potentially be warehoused versus what needs to be migrated, as well as how to manage third-party sources that will remain post-implementation.
* The organization will need to appoint a data steward or stewards to support the migration process. Not only will the organization be relocating their data, but they will also be transitioning to a new data model and potentially fund-based accounting. These shifts require a thoughtful approach.
* A data hygiene review and de-duplication of data is recommended prior to data migration. Partners may or may not support the organization in this process. B*e sure to inquire as this can impact the cost of a partner’s services*. Data readiness can be time-consuming but is essential prior to migration.
* An implementation partner will work with an organization to determine the best method for importing existing data into Fundraising and Engagement. Data migration will involve mapping and aligning the existing data structure with the Common Data Model for Nonprofits. This process will create recurring payment schedules within the solution and apply the organization’s current General Ledger structure to build the fund structure for use when processing future gifts.

For importing third-party gift sources, Fundraising and Engagement has a Donation Import Tool, that organizations will use to import gifts into the solution. This tool appends these gifts to an existing contact or organization or creates a new contact or organization record.

# Adoption

* A nonprofit should think ahead about the individuals who will need to be trained and who the super-users will be to help champion change and support the greater team as they transition to a new way of working.
* The transition to Fundraising and Engagement could be a shift from a tool team members have used for years or decades. Not only will they need to learn the new solution, but they will also need to orient themselves to Dynamics 365 and functionality relevant to their daily work.
* Nonprofits may want to enlist the help of a change management specialist to prepare and guide them along the journey. This transition is not just about a change in technology. It is a direct change to the way team members work every day to drive their mission forward.

# Licensing

* Fundraising and Engagement requires a full Dynamics 365 Sales Enterprise license. It is free of charge for nonprofits that have passed [eligibility requirements](https://www.microsoft.com/en-us/nonprofits/eligibility). Pricing is subject to change.
* The solution is not compatible with a Team Member license.

# Azure

* Fundraising and Engagement requires an Azure tenant for payment processing. On average this equates to $300/month which can be covered by the $3,500 annual Grant available to all nonprofit organizations on the Azure Portal, which can be applied against its usage of Azure services. For more information about the Azure Grant, go to <https://www.microsoft.com/en-us/nonprofits>.
* Organizations can utilize the [pricing calculator](https://azure.microsoft.com/en-us/pricing/calculator/) to configure and estimate the costs for Azure.

# LinkedIn Sales Navigator

* Either a LinkedIn Sales Navigator Team or Enterprise license is necessary to leverage the LinkedIn Sales Navigator functionality in Fundraising and Engagement.
* Nonprofit discounts for LinkedIn Sales Navigator licenses are available and you can learn more by visiting the [LinkedIn for Nonprofits website](https://nonprofit.linkedin.com/fundraise). To understand eligibility requirements and discounts, please visit this [FAQ page](https://nonprofit.linkedin.com/faq) or you can contact the [LinkedIn team](https://nonprofit.linkedin.com/faq/contact-us) for more details.

# Additional Guidance

Dynamics 365 has a complete list of [adoption resources](https://docs.microsoft.com/en-us/dynamics365/adoption/adoption-resources). It contains proven, best practice guidance on how to drive success with your technology investment, including:

* [Adoption guide](https://docs.microsoft.com/en-us/dynamics365/get-started/adoption/adoption-guide)
* [Adoption checklist](https://docs.microsoft.com/en-us/dynamics365/get-started/adoption/adoption-checklist)
* [Adoption planning workbook](https://docs.microsoft.com/en-us/dynamics365/get-started/adoption/adoption-workbook-overview)
* [Champions guide](https://docs.microsoft.com/en-us/dynamics365/get-started/adoption/champions-guide)
* [Team members guide](https://docs.microsoft.com/en-us/dynamics365/get-started/adoption/team-members-guide)