

# BDO Dynamics 365 Transformation Toolkit for Non-Profit

Transform your business with BDO Dynamics 365 Transformation Toolkit for Non-Profit.

## BDO DYNAMICS 365 TRANSFORMATION TOOLKIT FOR NON-PROFIT OVERVIEW

BDO's Non-Profit Toolkit provides a unique set of tools, accelerators, and business strategies for the Non-Profit industry, powered by Microsoft Dynamics 365 for Non-Profit. BDO's transformation approach emphasizes outcomes, process improvement, and organizational change management to help organizations drive meaningful value from their investment.

BDO brings deep nonprofit industry knowledge to guide your organization through transformation—delivering a solution that aligns leading practices with your mission.

## BDO DYNAMICS 365 TRANSFORMATION TOOLKIT FOR NON-PROFIT BUSINESS CASES



Gain financial transparency with robust tools to track earmarked funds and meet donor and regulatory requirements



Centralize grant data, automate workflows, and simplify reporting to reduce admin burden and help ensure timely submissions



Accurately track restricted/unrestricted gifts and report back to donors with clarity



Consolidate donor data and uncover insights to drive personalized engagement and boost retention



Deliver real-time views into financial, fundraising, and outcomes to inform leadership decisions with actionable data

## STEPS FOR A SUCCESSFUL DYNAMICS 365 TRANSFORMATION TOOLKIT FOR NON-PROFIT IMPLEMENTATION

1. Alignment on your desired business outcomes and transformation goals
2. Design effective processes to achieve defined outcomes
3. Develop implementation strategy, required reports, and process workflows
4. Implement Microsoft Dynamics 365, deploy workflows, and build dashboards
5. Create KPI's and process feedback to enable the cycle of continuous improvement
6. Activate adoption and change management support

## DYNAMICS 365 TRANSFORMATION TOOLKIT IMPLEMENTATION KEY DELIVERABLES INCLUDE

BDO's Transformation Toolkit empowers companies to transform challenges into strategic opportunities for growth and innovation, breaking free from digital concrete.

- ▶ Program Management and Transformation Accelerators
- ▶ Prescriptive templates for processes and configurations specific to Non-Profit
- ▶ Purpose-built reporting and analytics for Non-Profit
- ▶ Pre-Built connectors and solutions for grant management, donor management, and donor loyalty programs
- ▶ Microsoft Dynamics 365 for Non-Profit deployment

## WHY CHOOSE BDO DIGITAL



### Get it Right from the Start

BDO's Digital Transformation team includes seasoned business leaders with the experience to understand your organization and recommend the right processes and technology to achieve your business outcomes.

### Broad Capabilities

Working alongside BDO, you tap into a global advisory network with experienced professionals who understand every facet of your industry and business.

### Accelerate Your Success

BDO's Nonprofit Toolkit is designed to support a smooth, value-driven transformation—helping your organization realize benefits sooner. Beyond implementation, BDO works closely with nonprofit leaders to support long-term success and help sustain the value of your investment well into the future.

### \*Pricing will vary based on the scope of the engagement

BDO Digital, LLC is a Delaware limited liability company, and a wholly-owned subsidiary of BDO USA, P.C.

Our purpose is helping people thrive, every day. Together, we are focused on delivering exceptional and sustainable outcomes and value for our people, our clients and our communities. BDO is proud to be an ESOP company, reflecting a culture that puts people first. BDO professionals provide assurance, tax and advisory services for a diverse range of clients across the U.S. and in over 160 countries through our global organization.

BDO is the brand name for the BDO network and for each of the BDO Member Firms. BDO USA, P.C., a Virginia professional corporation, is the U.S. member of BDO International Limited, a UK company limited by guarantee, and forms part of the international BDO network of independent member firms. For more information, please visit: [www.bdo.com](http://www.bdo.com).

© 2025 BDO USA, P.C. All rights reserved.