Customer Insights for Nonprofits – 4-week Implementation and Solution Planning Workshop

Integrate & enrich information across client touchpoints to improve insights, action, and accountability

- A 360-degree, master-data strategy for clients and family information that unifies, matches & merges data from multiple agency touchpoints.
- Provide quality data and operational reports for internal processes, grant and partner agencies.
- Enrich clients and their family by client segmentations, recency & frequency models, life stage, life events and behavioral characteristics.
- Plan and optimize outreach programs.
- Extend data, where needed, with external data aggregators such as the public health department or education boards.
- Enable and extend line-of-business experiences using Microsoft Power Platform.
- Maintain compliance and control access to critical data through data governance.

Overview

Increase accuracy and trust in your data by creating a client data platform that offers a 360-degree view of your clients, volunteers and donors by using Microsoft Dynamics Customer Insights. Reduce information and analytics barriers in understanding interactions, demographics and behavior of individuals to provide better support to members and households of your community.

Wipfli's experience

With over 3000 nonprofit clients, Wipfli has been providing consulting services for nonprofits for several years. It hosts two of the country's largest nonprofit conferences twice a year that attracts thousands of agencies including Community Action Programs and community councils.

Building a client data platform requires deep skills in managing data be it in the data cleaning process to take care of things like names and address cleaning to structuring the data for efficient processing within Dynamics Customer Insights. Wipfli's Data & Analytics team's expertise covers data skills that augments other data collection & processing requirements around the development of a client data platform.

Connect to agency systems

Customer Insights offers several means to connect to a wide variety of data sources. Wipfli has developed expertise in understanding the data and connections to applications that support operations in agency systems including intake systems, program-specific systems, volunteer management and donor management systems. Customer Insight's identity resolution algorithms provide the means to consolidate often incomplete data from various systems. Further enhance your data and customize data integrations, where needed with external data aggregators including the public health department or education boards.

Enhance support over an integrated view
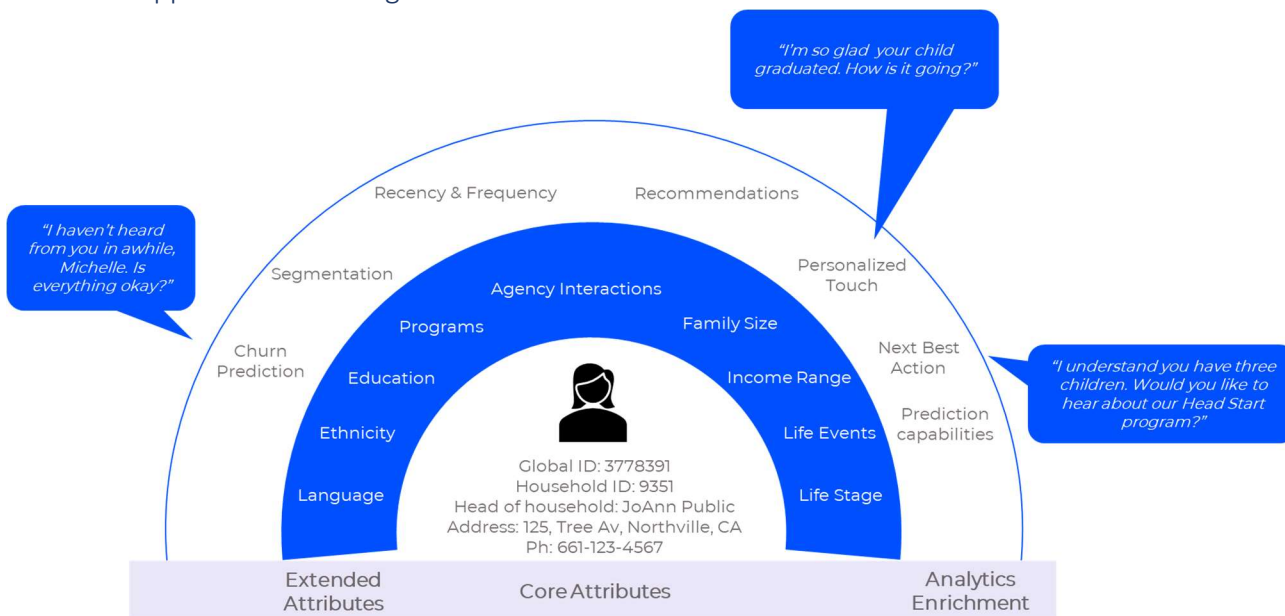
Provide support and growth of your community's members throughout their life stages. Remove inefficiencies in accessing and providing program services to your partners. Tackle situations such as:

- Identify under-served areas of the community to effectively direct outreach programs.
- Segment individuals and households based on characteristics.
- Appreciate intake and churn trends for services across the community.
- Address individual client requirements to identify next-best action and referrals to your services
- Corelate child's performance in the Head Start program with health
- Qualify eligibility of an applicant for program like Energy Assistance
- Create trustable reports like CSBG for grant funded programs

Solution Enhancements

The workshop will identify strategic KPIs and analytics required to assess your clients, volunteers and donors that can then assist your outreach initiatives, support and financial requirements. The deliverables from the workshop will include a Power BI implementation plan to fulfil information requirements of internal and external data consumers. Also covered will be plans for analytics requirements that enable segmentation, client/household lifecycle, recency-frequency-value models and related support programs.

PowerApps allows rapid no-code application development over your data. Power Automate allows for automating rules in a process flow. The design and implementation plans will incorporate the inclusion of such PowerApps and Power Automate requirements.

Our expertise in data management and governance coupled with expertise in Azure policies, Dynamics D365 and the Common Data Model will help setup the right governance and compliance mechanisms to manage your core master data. The workshop will be used to collect the required information that will then be presented as a data governance plan for the extended implementation phase.

Deliverables:

- Two, 4-hour workshops to understand your data, source systems, integrations, KPIs, analytics, and reporting requirements
- Data Analysis to understand data quality, integration rules, identity resolution requirements.
- Setup of the initial sandbox and production environments
- Connect and apply transformations over two data sources
- Setup of match-merge rules based on data analysis
- Power BI dashboard to analyze macro and micro trends using the data.
- A solution proposal that covers the implementation of analytics, process optimization and automation using the Power Platform.