



# Crash Course in Microsoft 365 Business for Nonprofits

Securely run and grow your nonprofit with an integrated solution purpose built for small and midsize organizations.



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# Introduction

More than four million nonprofits around the world have fewer than 50 employees. These small and medium size organizations have many of the same needs and goals as larger nonprofits. They work on the frontlines to save lives, provide critical services to underserved communities, protect the environment, and much more. The challenge is they have fewer resources to purchase the latest technology, train their employees to use it, employ IT support staff, or invest in resources to keep their organizations secure.

[A study from Microsoft](#) found that 60 percent of nonprofits report having no organizational digital policy to manage cybersecurity risk, and 74 percent do not take critical security steps to ensure email accounts are not compromised. If nonprofits don't have cybersecurity practices in place, their organization and beneficiary and donor data is vulnerable to hackers.

To address these challenges, Microsoft assembled a team of engineers, philanthropists, and business development professionals to focus on helping every nonprofit accelerate their mission through more productive, efficient, and safer use of technology. The result is a three-pronged approach that includes:

- Making best in class cloud technology available at an affordable price
- Offering nonprofit-specific solutions to improve efficiency and impact
- Supporting your nonprofit's digital fluency and capacity to use this technology successfully through digital skills training and resources specific to your unique challenges and needs.

All three components help bridge the digital divide and create greater efficiencies, collaboration, and security that can propel nonprofit organizations forward. To support your organization's work we are rolling out a series of solutions designed to help even the smallest nonprofits focus on what matters most—accelerating your mission.



## Get Microsoft 365 Business for your first 10 users—Free

[Microsoft 365 Business](#) is a cost-effective, subscription-based cloud service, built especially for small and medium-size organizations. It combines the best-in-class productivity of Office 365 with advanced security and device management capabilities to help nonprofits securely run and grow their organizations. This combination helps your employees work together more easily from anywhere on any device, knowing that their activities are protected by strong, integrated, yet transparent security solutions, managed from one simple administrative console.

To make those services more affordable to nonprofits of all sizes, Microsoft has created a **special offer** just for nonprofits. Nonprofits can get Microsoft 365 Business free for up to 10 users, and discounted pricing of \$5 per additional user per month above that.

→ [Learn more about Microsoft nonprofit offers.](#)

## New Teams Templates

Beyond simply saving your organization money, Microsoft is also committed to enhancing the ability of your employees and volunteers to work better together. We are launching new Teams Templates designed specifically to address many common nonprofit scenarios. We're starting with program and grant management, and will add templates for volunteer management, nonprofit board management and governance, and more in the coming months. These templates make it easier to standardize and collaborate on tasks so your staff can achieve more together.

## On-demand training specifically for nonprofits

We also want to help nonprofits to get the most value from your technology tools so you can do more good in the world. A recent survey of nonprofits conducted by Microsoft, found that more than 60 percent of respondents desired more IT training. To address that demand, Microsoft is aiming to provide training to 1 million nonprofits by 2023.

We are teaming up with [TechSoup](#)—a trusted partner in providing digital platforms for nonprofit organizations for nearly three decades—to launch the [Microsoft Digital Skills Center for Nonprofits](#) to help advance digital skills. Our initial offerings include free Teams Templates webinars and other nonprofit-specific courses to help you get the most out of the core productivity tools in the Microsoft 365 Business apps you already know and love. In these courses, we'll show you quick tricks and shortcuts to help you save time and increase your mission impact.

→ [Check out the Digital Skills Center's latest offerings.](#)

## How to use this eBook

This e-book highlights scenarios that show how Microsoft 365 Business can help you get more done, faster, easier, and from anywhere. It also summarizes the resources available to nonprofits from Microsoft that can help you make the most of those tools to serve the populations at the heart of your mission. Our goal is to support your goals, so you can continue to do more good work.



# Get more done

Increase productivity with intelligent tools built into the Office apps you love, along with enterprise-grade email and file storage

## Scenario 1: Drive decisions with visual collaboration

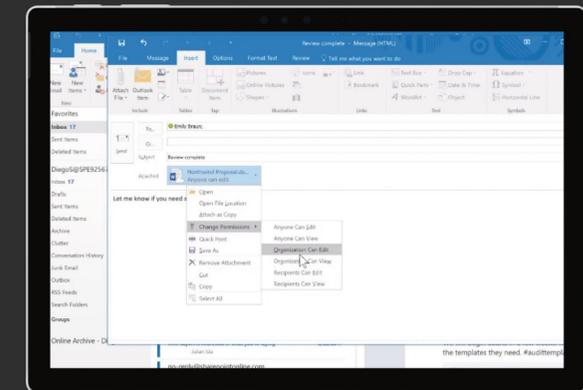
Getting the right information in front of the right people right now is crucial if you want to effectively capture immediate opportunities and serve your beneficiaries. Whether you're reviewing the latest donation numbers with managers or planning a major fundraiser, presenting information visually in real-time improves the experience and gets you to the next step faster. With Teams, part of Office 365, it's easy to schedule an online meeting from Outlook or immediately jump into an online meeting directly from PowerPoint, Excel, or Word. You can share your screen, brainstorm on a virtual whiteboard, edit documents in real time, and instant message with other meeting members to make decisions quickly and keep work moving.

## Scenario 2: Stay productive on the go

Expanding your outreach services? Gearing up for a major volunteer recruitment effort? Launching a new initiative? When your employees or external partners need to collaborate, they can streamline their efforts and stay in sync, wherever they may be working. SharePoint team sites provide a set of tools that are integral for collaboration, including (via Outlook) a group calendar, a planner for task management, and a group inbox. Teams can access a common set of files stored in SharePoint and customize their team sites to highlight the most relevant files, resources, and content. Adding or removing members updates the team site's permissions automatically in both SharePoint and Outlook. That means information is securely shared with the right team members without users having to call you or an IT resource for help. Put simply, with Microsoft 365 Business, teams are empowered to build collaboration spaces as needed.

## Scenario 3: Stay a step ahead

Information isn't much use when you can't find it, and looking for it wastes too much time. OneDrive for Business can help your staff find what they need quickly. They can easily save email attachments from Outlook to OneDrive and can search files and folders across any of their devices. OneDrive even uses optical character recognition (OCR) to search images and PDFs. They can preview more than 270 common file types, including images, PDF, Photoshop, Illustrator, and Visio. And they can stream videos directly from OneDrive to help them find what they need quickly without filling their devices with unneeded files. Looking for an older version of a file? Right-click on a file for a history of up to 25 versions. Wherever your employees are working, they will have access to these search and discovery features.



## How it works

Avoid versioning issues caused by passing files back and forth in email.

1. Save an edited file in OneDrive.
2. Open a new email in Outlook and select "Insert" and "Attach file." Then, select the file you want to send from recent files saved in OneDrive.
3. A OneDrive link will be attached. Click on that link to "Change permissions" for added security to allow only the recipient or people in your organization to edit or view the file.

Because a OneDrive link is attached, files are kept out of your inbox and everyone works from the most recent version saved in the cloud.

# Work better together

Collaborate, share, and communicate with flexible tools that go wherever your team goes

## Scenario 1: Stay connected even offline

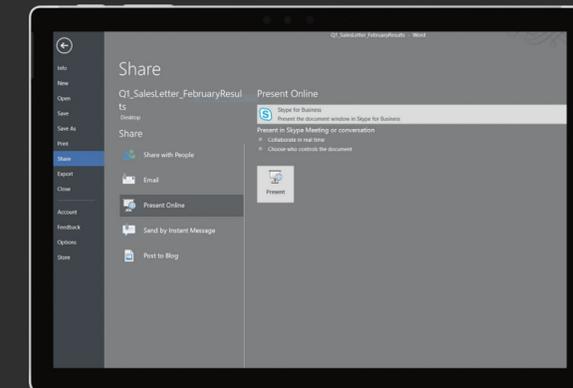
Microsoft 365 Business keeps all your teams in touch and productive on the go on any Windows, Mac, iOS, or Android device. They can even auto-sync after working offline on a laptop. Let's say some of your employees are traveling to check out new field operations. With Exchange Online and Outlook, they can communicate in real time while on the ground. In the air, they can read and respond to emails sent before the flight, review and set calendar appointments, and access contacts stored on their devices. Once their device reconnects, their emails are sent automatically, their calendar is updated, and they're back in "real time."

## Scenario 2: Sync files automatically

Mobile access also works for Office productivity apps, such as Word, Excel, and PowerPoint. Imagine creating a document on your desktop, making edits on a smartphone while waiting for an appointment, and finishing it on your laptop at home. Each time, employees pick up right where they left off. Thanks to OneDrive, files stay synced so employees have access to the latest version of each document, no matter where they are working from. And sharing files is easy. Your staff can share files or folders with specific people, send links that enable access inside or outside your organization, and easily view and modify the permissions they've granted.

## Scenario 3: Create and collaborate anywhere

With Office 365, team members can collaborate on the same documents at the same time. Let's say you and an associate are putting the finishing touches on a presentation to corporate donors that must be delivered in an hour. You're in Seattle, and your associate is in San Francisco. You jump on a Teams video call, and each of you opens the document saved to OneDrive on your devices. As you review the document, you can quickly make decisions and edits together, rather than laboriously swapping versions back and forth in email.



## How it works

Need to talk in real-time about a document, spreadsheet, or presentation?

1. From Word, Excel, or PowerPoint, select "File" and then "Share."
2. Select "Present online" and then click the "Present" box to open a new Teams meeting. Your document will automatically open in the Teams meeting and your screen will be shared.
3. In Teams, select the "Invite more people" icon. As you type your colleagues' names, you can even see if they're already in another Teams meeting or when they were last online.

# Safeguard your organization

Help protect your nonprofit against external threats and data leaks with built-in privacy compliance tools

## Scenario 1: Reduce your security risk

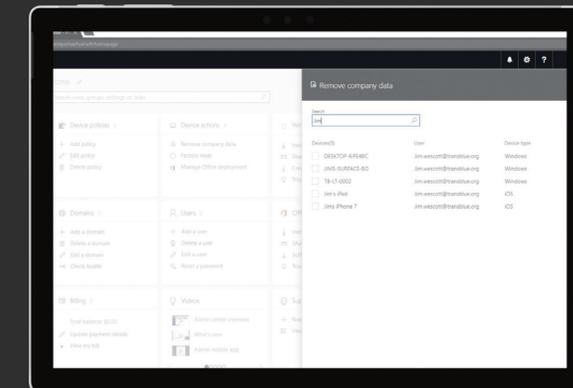
Microsoft 365 Business includes all the security features of Windows 10 Pro, including Windows Defender Management Controls, which allow you to manage your security controls within one product. This will help you gain peace of mind with a consistent set of security settings designed for your organization. With automatic and universal enforcement of policies, your nonprofit's risk profile will be lowered, even across personal devices that employees and volunteers use for working on projects for your organization.

## Scenario 2: Protect devices and data from security threats

Microsoft 365 Business is built with enterprise-grade security, at a price your nonprofit can afford. Each user automatically receives all the latest security updates from Office 365 and Windows 10. This helps to ensure that your organization's data is protected across devices against every new threat—from malware to phishing to ransomware—and business information is confined to Office apps. For example, if you equip your employees with Surface devices and Microsoft 365 Business subscriptions, they'll be able to work and collaborate on the go, with no trade-off for security.

## Scenario 3: Control access to your data

Even when your organization's data is out of your hands, you can still easily protect it with Microsoft 365 Business. If an employee or volunteer leaves your organization, loses a phone while traveling, or has a laptop or Surface device stolen, devices and data are automatically protected with built-in encryption. You can easily perform a remote wipe of business data on devices and even automatically wipe a device that's been dormant for a certain number of days, while leaving personal data untouched. This level of security and control provides the assurance your staff needs to use personal devices for work, and the protection your organization needs to confidently pursue your mission.



## How it works

Need to remotely wipe an employee's personal device after they leave your organization?

1. In the Admin Center, click on the Devices card.
2. Search for the employee's name to view all their devices.
3. Select the device you wish to remotely wipe, click "Remove company data" and "confirm."

The next time the former employee logs in to an Office app on that device, they will be notified that your organization's data has been removed.

# Simplified for you

Easily setup and manage your users, devices, and data, and gain more time to focus on your mission

## Scenario 1: Manage users and devices with a single console

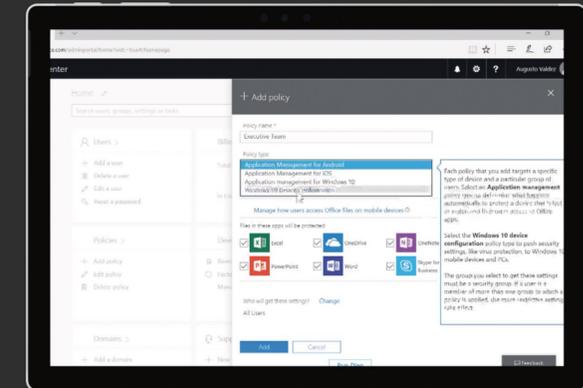
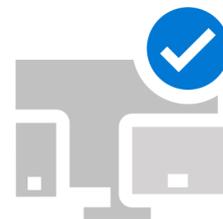
The Microsoft Admin Console is your control center for Microsoft 365 Business, giving you a single place to configure your nonprofit's security policies, and manage devices and apps. The Setup Wizard condenses 45 enterprise-grade security settings into 15 easy-to-understand toggles or pull-down menus. Here, you can set organization-wide or group-specific policies for mobile and Windows 10 devices. For example, you can manage access to Office files on mobile devices by requiring a PIN or fingerprint. And you can prevent users from copying content from Office apps into personal apps. On the Windows 10 side, you can ensure Windows Defender antivirus is always active and keep Windows 10 devices up to date automatically. You can even install Office on Windows 10 devices automatically.

## Scenario 2: Easy employee setup and deployment

Microsoft 365 makes it simple to set up new staff on their devices, so they can start working quickly. To create a new user, just assign the user to a security group; the policies that you have set up for that group will be applied automatically. Depending on these policies, when staffers sign in to their Windows 10 device, their Office 365 apps may be downloaded automatically, and their operating system will be kept up to date without any effort on their part. They can even use their own mobile devices and your organization's data will be just as secure.

## Scenario 3: Single sign-in for all services and devices

As easy as it is for you to administer your staff's devices and apps, it's even easier for your staff to use them. Microsoft 365 requires them to sign in just once for every app, Windows 10 device, and service. As a result, your employees can work anywhere on any of their devices, using their favorite Office 365 productivity apps, safe in the knowledge that security is taken care of.



## How it works

Need different policies for different user types, such as your executive team?

1. In the Admin Center, select "Add policy" on the Policies card.
2. Name the policy and select the policy type. For example, select "Windows 10 Device Configuration".
3. At this point, you can select different options for each team. For example, you may want your executive team to be able to download apps from the Windows Store, but you may not want to give your volunteers that option.

# Shortcuts to enhanced collaboration

Save time on essential tasks with Teams Templates

**To help our nonprofit customers take full advantage of Microsoft Teams, we're developing a series of easy-to-use Teams Templates that will streamline the tasks in many essential nonprofit scenarios, including:**

- Program and grant management
- Volunteer engagement
- Nonprofit board and management governance
- Building and delivering fundraising proposals and managing campaigns
- Month-end financial closings and financial reviews
- Empowering firstline workers with scheduling management
- Managing recruitment, onboarding, and employee performance reviews

These templates are designed to save nonprofits time and enhance your control over all aspects of your mission. More related tools will be coming as we discover new ways to address the unique business challenges nonprofits face in their drive to reach more people and do more good.



# What's the difference between Office 365 and Microsoft 365 Business?

Choosing the best solution for your organization

**Office 365** is the best-in-class productivity solution that gives you the apps and services to help your employees get more done and work better together. **Microsoft 365 Business** includes the same apps and services as Office 365, along with additional security and management capabilities to help you safeguard your organization's data across devices. Your staff can use Microsoft 365 Business to communicate, collaborate, and do amazing work together. Plus, it protects your data without requiring complex IT management or expensive on-premises equipment.

As a subscription service, Microsoft 365 Business offers cost-effective pricing, while ensuring that you and your staff are always working with the latest and most secure version of Windows 10 and Office 365. It is designed to be run by you or a trusted partner, which can help you save on capital expenses, scale as you grow, and get the IT expertise you need to run your business better.

## Your Microsoft 365 Business subscription includes:

### Office apps

Get premium versions of Word, Excel, PowerPoint, OneDrive, OneNote ([features vary](#)) Outlook, Publisher,\* and Access\* installed across PCs, Macs, tablets, and mobile devices.

### Email and calendaring

Use business-class email through Outlook that you can access from your desktop or from a web browser.

### Data protection controls

Protect your organization's data on both personal and organization-owned devices, and remotely remove that data from both types of devices.

### File storage and sharing

Manage files from anywhere with 1TB of storage.

### Cyberthreat protection

Guard against unsafe attachments, suspicious links, and other malware.

### Administration and deployment

Manage new PCs and devices faster and more easily than ever.

### Dependability and support

Get a 99.9% financially backed uptime guarantee and 24x7 online and phone support.

*\*PC Only.*

## Microsoft 365 Business and Office 365 at a glance

Microsoft 365 is an integrated solution built especially for small and medium-size organizations that prefer to focus on their mission rather than on managing IT systems. It includes all the apps and services of Office 365, plus management capabilities, and the best-in-class security protection of Windows 10 Pro.

# Office 365 and Microsoft 365 feature comparison

## Devices per license

5 PCs or Macs, 5 tablets & 5 mobile devices ● ●

## Productivity applications

Premium versions of Word, Excel, PowerPoint, and Outlook. ● ●  
OneNote: access to additional OneNote features ([features vary](#))

Publisher & Access (PC only) ● ●

Office apps for iOS and Android devices ● ●

Automatic new features updates ● ●

## Business applications

Customer relationship manager built into Outlook ● ●

Self-service online customer scheduling ● ●

Create automated workflows with Microsoft Flow ● ●

## Collaboration services

Online meetings with screen sharing, audio, and HD video ● ●

A hub for teamwork with Microsoft Teams ● ●

Task management for teams with Microsoft Planner ● ●

Business-class email, calendar, and contact ● ●

## Document storage

Office document versioning and history ● ●

File storage and sharing with 1 TB per user ● ●

Document co-authoring and offline sync ● ●

## Device management

Securely manage data on Windows, macOS, iOS, and Android ●

Self-service PC deployment with Windows Autopilot ●

Simplified controls to manage Windows 10 Pro PCs ●

## Advanced Security Features

Helps protect your business from malware ●

Information Protection policies help control & manage data access ●

Controls to help protect company data on personal mobile devices ●

Preservation, compliance & archiving capabilities w/ continuous backup ●

## Support

24x7 web and phone support included ● ●

Deployment support with purchase of 150+ seats via FastTrack ● ●

99.9% financially backed uptime guarantee ● ●

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 [Learn more about Office 365 and Microsoft 365.](#)

# Building digital capacity

## Learning to make the most of your technology tools

A recent survey conducted by Microsoft found that more than 60 percent of the nonprofit organizations that responded wanted more IT training. To address that need, Microsoft is planning to provide this training to 1 million nonprofits by 2023. Our goal is to equip nonprofits of all sizes around the world with not only the best technology, but also the skills to make the most of that technology to increase their impact.

To support that training goal, we're proud to partner with [TechSoup](#) in launching the [Microsoft Digital Skills Center for Nonprofits](#). This center is dedicated to helping advance digital skills for nonprofit organizations of all sizes. TechSoup is a trusted partner that has helped nonprofits gain the skills and resources to accelerate their missions all over the world. Their digital platforms and in-person experiences have helped people work together for a more equitable world for nearly three decades.

By combining high-quality educational materials from Microsoft and the existing reach and platform behind TechSoup courses, the Digital Skills Center will help build digital capacity and enable cloud adoption among nonprofits. The courses offered will also help you get the most value possible from the Microsoft solutions you're already using.

### Online, on-demand, nonprofit-specific learning opportunities

The first set of courses from the Microsoft Digital Skills Center includes free webinars on Teams Templates and other free nonprofit-specific courses that cover core Office 365 productivity tools. The Digital Skills Center takes a "microlearning" approach, which delivers learning objectives in bite-size portions that are more instructionally effective and result in more easily searchable content. As a result, courses can double as on-the-job support materials.

All courses are available on demand, so you and your staff can progress through each learning path at a pace that suits your schedule. As you and your staff complete each learning path, you will receive a learning certificate. This makes the Digital Skills Center a valuable professional development resource for your whole organization.

### More to come

The Microsoft Digital Skills Center is a new frontier for helping nonprofits optimize some of the most widely used tools on the planet. We will constantly be gathering feedback from participants to learn more about the specific needs of our learning community and will continually update our course offerings based on that feedback.

#### **Some of the new courses we're planning include topics such as:**

- Impact Measurement Using Power BI
- Building Dashboards for Nonprofits
- Intro to PowerApps for Nonprofits
- Project Management Using Project



# Microsoft 365 Business FAQs

## Who is the Microsoft 365 Business donation offer intended for?

Microsoft 365 Business was purpose-built for small and medium-size organizations with less than 300 users. It is intended for organizations that want to provide their employees with the best-in-class productivity and collaboration capabilities of Office 365 as well as device management and security solutions to safeguard organization data and assets across devices.

## What should customers and partners know before running Microsoft 365 Business in their organization?

Customers who wish to run Microsoft 365 Business in their organization must be running Windows 7, 8.1, or 10 Pro\* on their current desktops. Current Windows 10 Pro PCs should be running Creators Update if they are not already doing so.

## What is the best way to deploy Microsoft 365 Business in my organization?

Partner-assisted deployment is the recommended way to deploy Microsoft 365 Business. Contact your Microsoft partner and ask them if they are offering Microsoft 365 Business. Your partner is well equipped to help you understand your options and make the best recommendations for deploying Microsoft 365 Business in your organization.

## How do I take advantage of the donated offer if I have already purchased Microsoft 365 Business?

Customers may acquire Microsoft 365 Business with the help of a partner. A Microsoft partner can help modify the licenses to add the free offer into your assets.

→ **If you do not have a Microsoft partner, you can find one here.**

*\*Windows 10 Pro upgrade rights are included with the Microsoft 365 Business preview if the target machines are presently running Windows 7, 8, or 8.1.*



