

# EMPOWERED

2025 | USER CONFERENCE | DETROIT, MI

## LEVERAGING INTEGRATION TOOLS TO IMPROVE EFFICIENCY: AN OPEN CONVERSATION

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# Agenda

Introduction

MS Teams Integration

MS Forms Integration

Power Automate

Encodian

Copilot

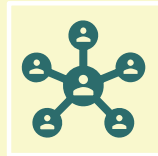
Breakout Activity

Open Discussion and Q&A

# MS Teams Integration



Utilize MS Teams for collaborative communication directly linked to CRM records.



Example: Foundation staff use Teams channels to discuss donor profiles linked via Dynamics 365.



Discussion Prompt: How has Teams improved your internal communication around CRM data?

# MS Forms Integration



Collect data through MS Forms and automatically populate CRM fields.



Example: Event registration forms feed directly into contact records in Dynamics 365.



Discussion Prompt: What types of forms have you integrated with your CRM?

# MS Forms Use Cases and Benefits for Foundations



Bring Data into Concepts table (pre-LOI)



Collect Donor Communication Preferences



Event Surveys (post event)



Opting in/out of newsletters

# How to Collect Data Through Forms

## Create a Form in MS Forms

- Go to <https://forms.office.com>.
- Click **New Form** and add fields relevant to your data collection (e.g., contact info, feedback, service request).

## Connect MS Forms to Dynamics 365 via Power Automate

- Open <https://flow.microsoft.com>.
- Create a new flow: **Automated Flow** → Trigger: “When a new response is submitted” (MS Forms).
- Add action: “Get response details” to retrieve submitted data.

## Create a Record in Dynamics 365

- Add action: “Create a new record” in Dynamics 365.
- Choose the entity (e.g., Contact, Constituent).
- Map form fields to CRM fields (e.g., Name → Full Name, Email → Email Address).

## Test and Deploy

- Submit a test form.
- Confirm the record appears in Dynamics 365 CRM.

Resource: [MS Learn: Overview of using Microsoft Forms and Power Automate](#)

# Power Automate



Automate workflows between Microsoft tools and Dynamics 365 CRM.



Example: Automated email alerts when a new grant application is submitted.



Discussion Prompt:  
What workflows have you automated to save time?

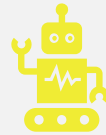
# Encodian

Enhance document management with PDF conversion and storage automation.

Example: Automatically convert uploaded documents to PDF and attach to CRM records.

Discussion Prompt: How do you manage document workflows within your CRM?

# Copilot



Use AI-powered assistance to generate content and insights within Dynamics 365.



Example: Copilot helps draft donor communications based on CRM data.



Discussion Prompt:  
What tasks has Copilot helped you streamline?

# Microsoft Copilot in Dynamics 365 CRM



AI-powered assistant embedded in Dynamics 365



Uses natural language to help users interact with CRM data



Automates repetitive tasks and provides intelligent suggestions



Integrated with Microsoft 365 tools for seamless workflows

# Copilot Use Cases and Benefits for Foundations



Draft donor emails and meeting summaries automatically



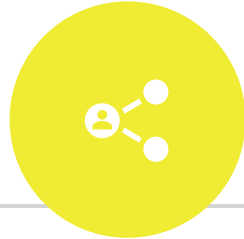
Generate grant application insights and summaries



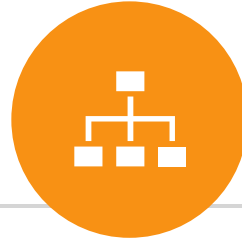
Use natural language to query CRM data (e.g., 'Show me recent donations over \$5,000')



Reduce time spent on data entry and reporting tasks



WHAT OTHER TOOLS HAVE YOU FOUND VALUABLE IN YOUR CRM ECOSYSTEM?



WHAT INTEGRATION HAS HAD THE BIGGEST IMPACT ON YOUR TEAM'S EFFICIENCY IN THE LAST YEAR?



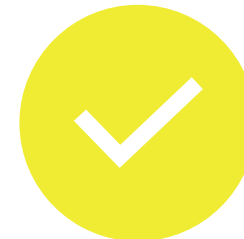
HOW DO YOU PRIORITIZE WHICH MANUAL PROCESSES TO AUTOMATE FIRST?



WHAT METRICS DO YOU USE TO MEASURE THE SUCCESS OF AN INTEGRATION?



HOW DO YOU ENSURE STAFF ARE TRAINED AND COMFORTABLE WITH NEW TOOLS?



WHAT INTEGRATIONS HAVE HELPED IMPROVE DONOR ENGAGEMENT OR GRANT TRACKING?

## Open Discussion and Q&A

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We invite you to share  
your experiences,  
challenges, and successes.

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Let's explore together  
how to make the most of  
these integration tools.

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Thank you for  
participating!

## Teams/MS Forms

How has Teams improved your internal communication around CRM data?

What integrations between Teams and Dynamics 365 have saved your team time or improved transparency?

Have you used Forms to collect data that feeds directly into Dynamics 365? What workflows have you automated?

What types of forms have you integrated with your CRM?

## Power Automate/Encodian

What workflows have you automated to save time?

What are your most impactful Power Automate flows connected to Dynamics 365?

How do you manage flow governance and error handling across departments?

How do you manage document workflows within your CRM?

## Copilot

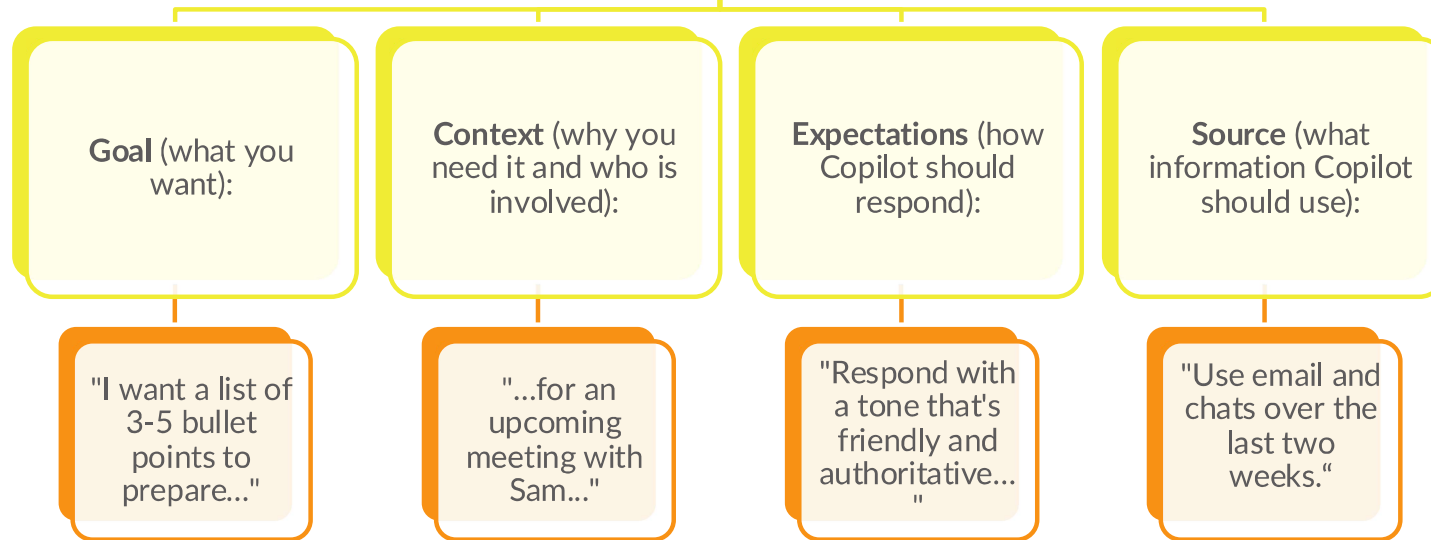
What tasks has Copilot helped you streamline?

Share a successful or unsuccessful prompt you've given Copilot. What were the results?

What are your concerns or hopes around AI-driven automation in your foundation's operations?

# Copilot Prompts

Copilot prompts are instructions or questions you use to tell Copilot what you want. Prompts can include four parts



You can put a little or a lot into a prompt, but all that's required is a clear goal. If you want to be more specific, add the other parts.

# Writing Effective Prompts



Include **details** like context, expectations, and source information in your prompts.



Provide **positive instructions**. Tell Copilot what "to do" rather than what "not to do."



**Iterate and regenerate**, especially if you're not happy with the initial results. You can revise your prompt to try again or try regenerating.



Always **review and verify** the responses from Copilot, cross-referencing with trusted sources when needed.

# Copilot Prompt Examples

You can create and edit content, ask questions, and summarize information.  
Here are some quick examples:



In **Teams**, for a recorded meeting, try "**List action items.**"



In **Word**, select a paragraph, and try "**Summarize this document.**"



In **PowerPoint**, use a prompt like "**Add an image of a target with arrows.**"



In **Teams**, enterprise customers can go try "**Find files Sam shared over the last two weeks.**"

# Copilot Resources

- [Copilot Prompt Gallery](#)
- [Craft effective prompts for Microsoft 365 Copilot](#)
- [Learn about Copilot prompts](#)

