

Microsoft Dynamics 365 Service Applications Fit Assessment



Thank you for your interest in Microsoft Dynamics 365. We're pleased to deliver this report, which contains:

- A summary of Dynamics 365 service applications and how they can support your nonprofit's needs.
- Your personalized recommendations, including recommended modules and estimated costs for your licenses.
- Clear next steps to help you move forward with your evaluation.

Microsoft Elevate

AI is advancing and spreading at extraordinary speed, reshaping how people learn, work, and access essential services. But adoption is uneven—many communities and institutions don't have the infrastructure, skills, and guidance to use AI and cloud technology safely and effectively.

Grounded in Microsoft's mission to empower every person and every organization to achieve more, Microsoft Elevate exists to help close these readiness gaps by strengthening the systems communities rely on every day—schools, workforce development systems, and nonprofits—so they can adopt AI responsibly and deliver real-world results. We bring together trusted technology, practical training, and partner-led support, alongside guidance that helps organizations establish clear guardrails for safe and accountable AI use.

Dynamics 365 Service Applications

Dynamics 365 Customer Service, Field Service, and Contact Center bring next-generation AI and Microsoft 365 Copilot to the heart of nonprofit service delivery. These applications help organizations resolve cases faster, coordinate field operations, and deliver consistent, high-quality support across every channel. With AI-driven insights, intelligent routing, and unified case management, nonprofits can improve staff productivity, enhance constituent experiences, and strengthen mission impact.

Microsoft Elevate and our partner ecosystem have deep experience helping nonprofits modernize how they manage inquiries, deliver programs, coordinate field activities, and support constituents across every channel. We understand the unique service challenges nonprofits face—from high case volumes and distributed teams to volunteer coordination, compliance requirements, and the need for clear, timely communication. Our team can help you evaluate where Dynamics 365 service applications can streamline operations, strengthen supporter relationships, and improve the overall service experience.

These Dynamics 365 service applications integrate seamlessly with Microsoft 365—including Outlook, Teams, and SharePoint—so staff can access case details, collaborate, and take action without switching tools. And because everything runs on the Microsoft Cloud, your organization benefits from enterprise-grade security, flexibility, and scalability designed to support nonprofits of every size.



With just 30 call center staff serving 270,000 members worldwide, Dynamics 365 Customer Service is helping the team answer questions and track concerns more efficiently. “With this CRM, it’s very easy for our team to look at the history of a member and their contacts with us. It connects all the dots, giving everybody the information they need when they need it.”

Jason Caldwell: Club Quality and Member Support Manager at Toastmasters

Your Company's Assessment Results

Based on the information provided, we recommend the following Dynamics 365 modules:

Modules	
Asset Management	Case Management
Contact Center	Contract Management
Customer Surveys	Knowledge Management
Service Level Agreements	Unified Routing
Work Order Management	Work Order Scheduling
Workforce Management	

License Costs

The estimated license costs outlined below are based on the initial user numbers provided and reflect nonprofit discounted pricing for organizations that have successfully completed the [Microsoft eligibility review](#) and have been approved. The estimates may change if the project scope or user numbers are adjusted.

Additionally, a Microsoft partner specialized in supporting nonprofit organizations will reach out to your team to demonstrate the full value of Dynamics 365 for your nonprofit's needs.

App	Type	License	Quantity	Monthly Price	Monthly Total
CRM	Customer Service	Enterprise	7	\$26.25	\$183.75
CRM	Field Service	Dynamics 365 Field Service	9	\$26.25	\$236.25

Next Steps

A Microsoft Customer Success Manager will reach out to you within five business days to discuss the results of your assessment and learn more about your nonprofit's unique goals and priorities. Following this discussion, we will connect you with a Microsoft partner who specializes in Microsoft solutions for nonprofits. This partner will support you in conducting a deeper evaluation of Dynamics 365 Customer Service to ensure it meets your requirements for managing constituent engagement effectively.

We look forward to supporting your journey and invite you to join a growing community of nonprofits—like [Toastmasters](#) and [yourtown](#)—that have modernized their operations and moved to the cloud with Dynamics 365 Customer Service.

Regards,

Microsoft Elevate



www.linkedin.com/showcase/microsoft-for-nonprofits



[AI Customer Service Management Solutions | Microsoft Dynamics 365](#)

(Your assessment is provided in partnership with Microsoft Dynamics 365 evaluation specialists, [See 365](#))

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