

SMARTER, STRONGER AUTOMATION

From Data to Impact: Stronger Stakeholder Reporting with Copilot and Power BI





QUICK TIPS

Teams Webinars



Ask Questions

Click the **Q&A** button and select **Ask a question**. Press **Send** to submit your question to the host or panelists.

Chat

Click the **Chat** icon (speech bubble) on the toolbar. Type your message in the **Type a new message** box at the bottom. Press **Enter** to send.

Raise Your Hand

Use the **Raise Hand** icon in the toolbar to signal that you have a question for the host or need assistance.



AI & Nonprofit Leaders



Brenda Kahler
Senior Director
Armanino Advisory LLC

Brenda is a Senior Director and the practice leader for nonprofit technology. She is also a member of the nonprofit and education leadership team. She has over 25 years of accounting experience in both public accounting and industry, primarily with international nonprofit organizations, higher education, and foundations. While at Armanino, Brenda has participated in over 400 software implementations and strategy evaluations. She loves helping others adopt new tech and is an enthusiastic AI user.



Steven Wise
Director
Armanino Advisory LLC

Steven is a Solution Architect on Armanino's Technology – AI team, where he helps clients translate complex business needs into scalable, AI-driven solutions. He partners closely with leaders across the firm to design and implement intelligent architectures that elevate data, analytics, and automation capabilities. His work spans initiatives such as Copilot adoption, Power BI-enabled reporting, and AI-powered process transformation. With a strong technical foundation and a collaborative approach, he plays a key role in shaping how organizations leverage next-generation technology to drive clarity, efficiency, and competitive advantage.

AGENDA

- CURRENT NONPROFIT LANDSCAPE
- POWER BI FOR NONPROFIT ORGANIZATIONS
- COPILOT & REPORTING INSIGHTS
- DEMO OF COPILOT + POWER BI WORKFLOW
- Q & A

Raise the Bridge or Lower the Water





Operational Adaptation

Cut Costs

- Analyze purchasing, defer non-essential purchases
- Review payables, adjust payment terms
- Evaluate facilities and infrastructure, anticipate maintenance schedules
- Reduce or eliminate programs/services
- Modify staffing

Increase Revenue

- Manage money differently
- Increase fees
- Accelerate fundraising
- Expand or add services
- Increase productivity

Modify Structure

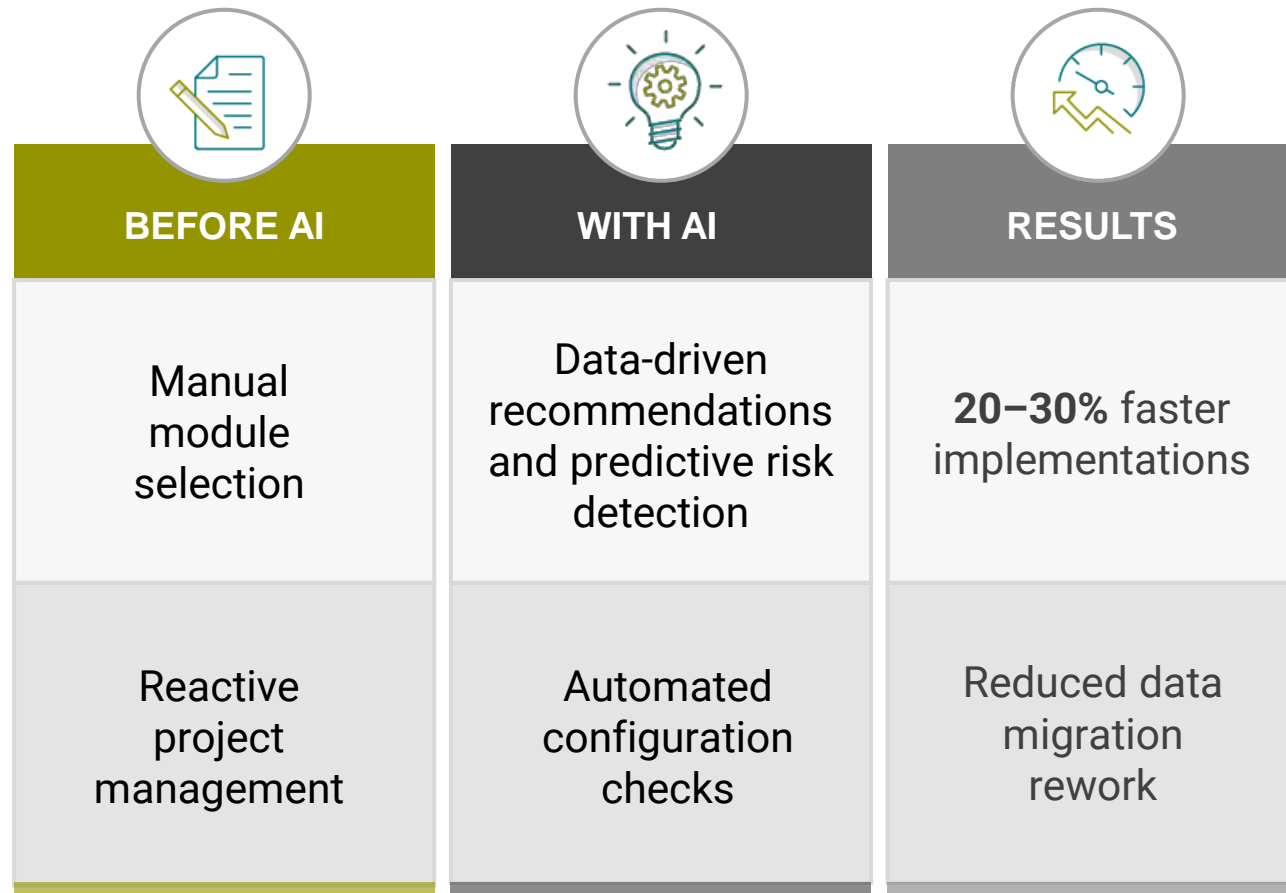
- Modify the mission
- Modify the organization structure
- Modify the organization culture

Increase Engagement

- Partner with other nonprofits
- Engage with the community
- Engage your business partners
- Engage with your donors



Smarter Selection & Implementation





AI for *Finance Leaders*

“AI turns data into decisions.”

1

Accelerate close cycles

2

Improve forecasting accuracy

3

Deliver real-time insights with
fewer manual steps



General AI Use Cases

Level	Name	Nonprofit Use Cases	Solution Ideas
01	Generative Productivity Boosting	<ul style="list-style-type: none">• Draft grant proposals from past templates<ul style="list-style-type: none">• Summarize board meeting minutes• Create onboarding guides for volunteers	<ul style="list-style-type: none">• M365 Copilot or Google Gemini Adoption Accelerator<ul style="list-style-type: none">• Prompt library development
02	Embedded Intelligence & Workflow Orchestration	<ul style="list-style-type: none">• Auto-route service requests to appropriate departments<ul style="list-style-type: none">• Generate donor impact reports from CRM data• Trigger follow-ups based on donation milestones	<ul style="list-style-type: none">• Armanino Guru AI Framework: A structured intelligence layer that combines curated knowledge, industry logic, and workflow execution• Domain-trained copilots that act like internal experts providing guidance and triggering next steps• Custom agents or embedded copilots that coach users through complex decisions and route information to the right place at the right time
03	AI Boosted Decision Making	<ul style="list-style-type: none">• Predict donor churn or likelihood to give• Forecast program demand based on seasonal trends<ul style="list-style-type: none">• Analyze volunteer engagement patterns	<ul style="list-style-type: none">• Data Readiness Workshop• Data Warehouse as a Service• Data Platform Modernization with Microsoft Fabric<ul style="list-style-type: none">• Data Analytics Visualizations with Power BI
04	Autonomous Analysis & Actions	<ul style="list-style-type: none">• Auto-adjust outreach frequency based on donor behavior<ul style="list-style-type: none">• Reschedule volunteer shifts due to cancellations• Trigger inventory replenishment for goods	<ul style="list-style-type: none">• Autonomous workflow orchestration• Azure AI + Copilot Studio Agentic Development & Orchestration (AI Workforce)



THE HUMAN + MACHINE WORKFORCE

- AI augments decisions, not replaces them
- Finance pros become AI supervisors
- Start small to scale adoption
 - Copilots
 - Smart Use Cases
- Armanino **AI Readiness Programs** enable adoption



SMARTER, STRONGER AUTOMATION

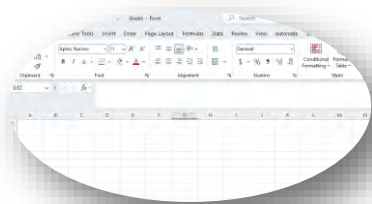
Unleashing the Power of BI



The Data Challenge in Nonprofits

Power BI was born specifically to put the Power back in the hands of the business user – not the IT department

- **Fragmented Data Systems:** Nonprofits have data stored in multiple systems, making it difficult to compile and report efficiently.
- **Limited Staff Capacity:** Small teams struggle to analyze and respond to data needs, delaying insight delivery.



2010-2013: Inside Excel



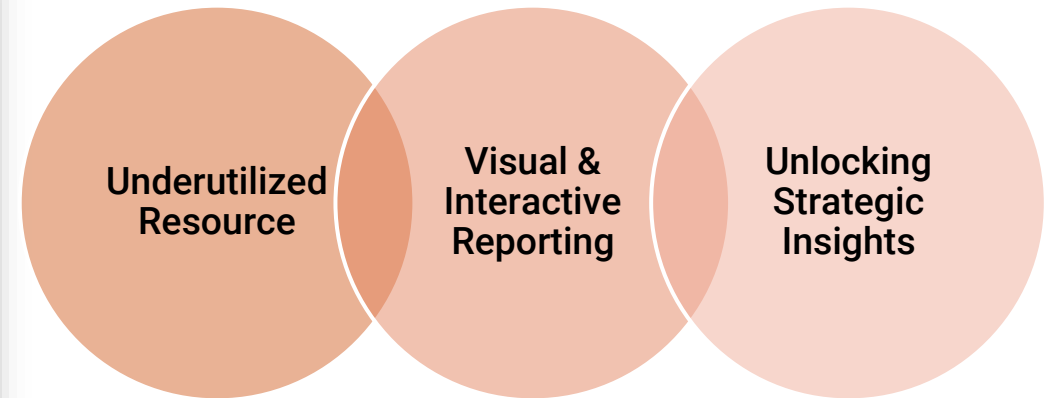
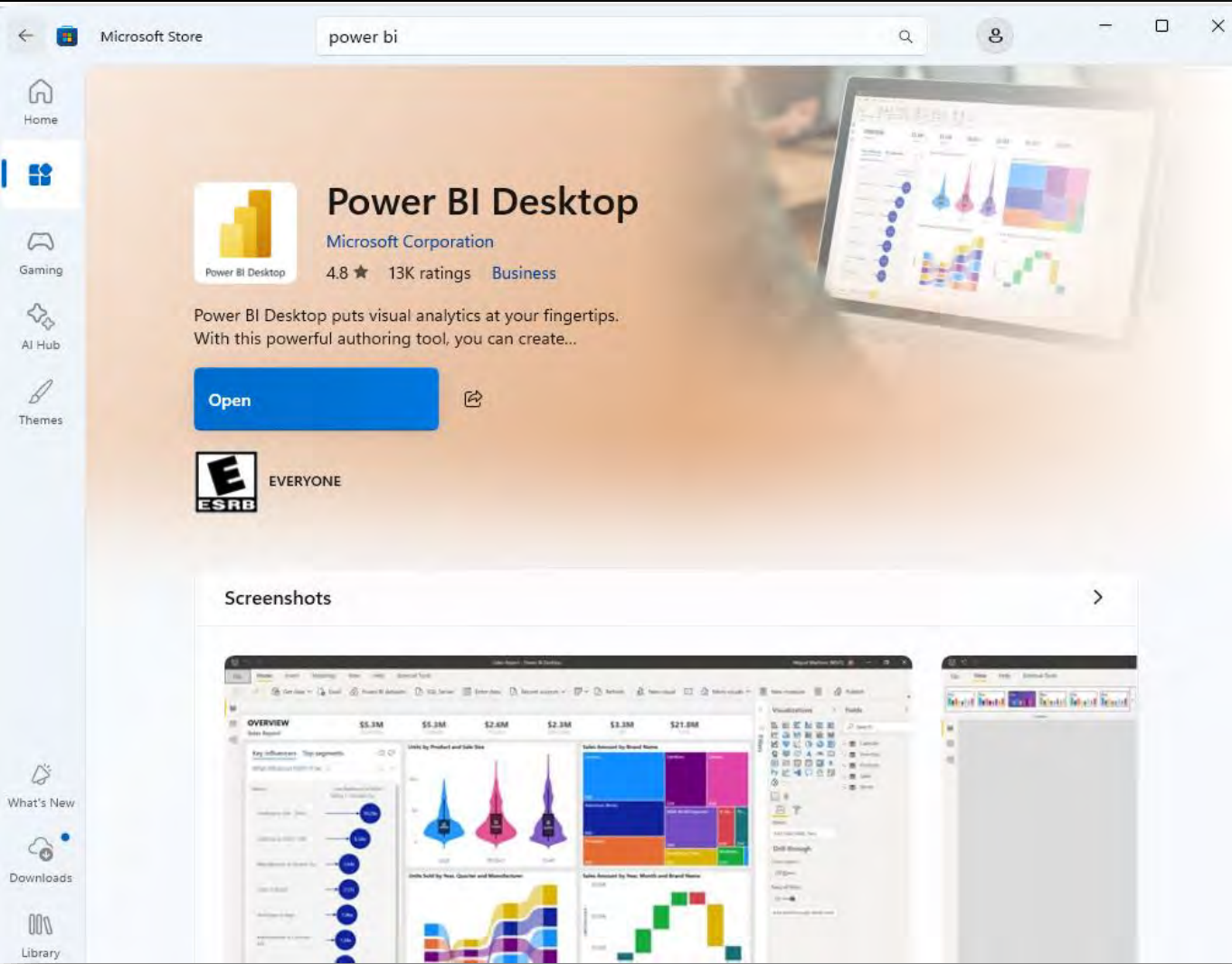
2018 - Present: Mainstream Player

2015: Emergence





Unleashing Power BI Potential



- ✓ It's free to download from the Microsoft App Store & and free to test online
- ✓ Open and connect to any of 300+ supported data sources



From Static Reports to Living Dashboards

Board Meeting Report Preparation

Power BI for Non Profit Analytics

Automated, scheduled, refreshable pipelines from operational systems into a unified reporting layer



Donor Management / CRM

Contacts, gifts, pledge history
Example: Salesforce NPSP style

Operational system



Fundraising Platform

Online donations, campaigns
Forms, events, email appeals

Operational system



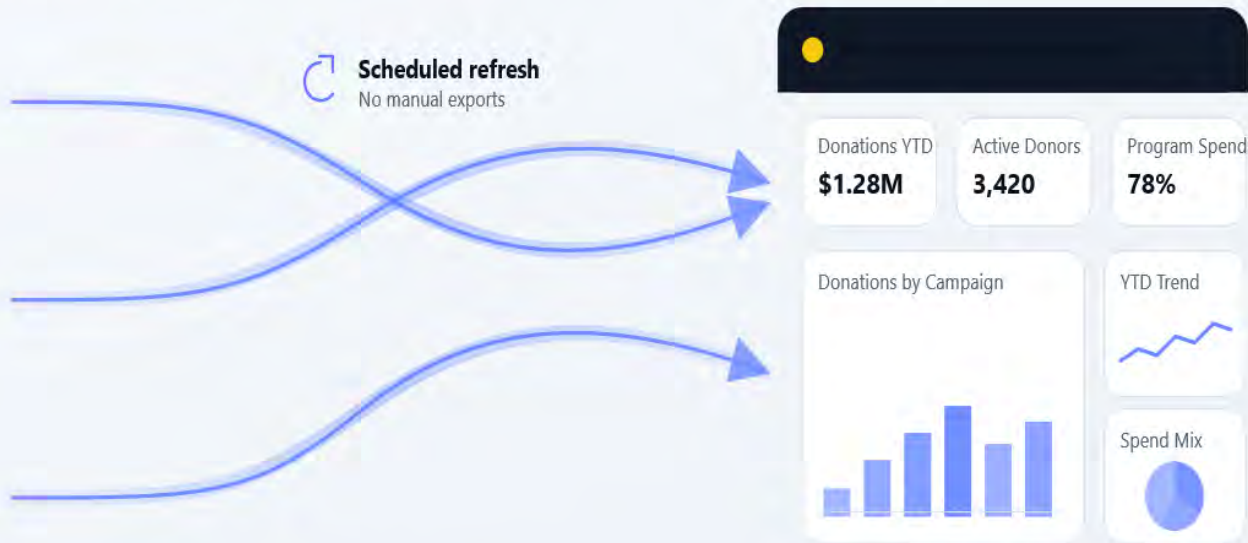
Accounting / Finance System

GL, grants, expenses, budgets
Reconciliation and reporting

Operational system



Scheduled refresh
No manual exports



Unified analytics for leadership, finance, and development teams

With Power BI, you can easily 'refresh' data against source systems, removing the need for manual exports or monthly rework



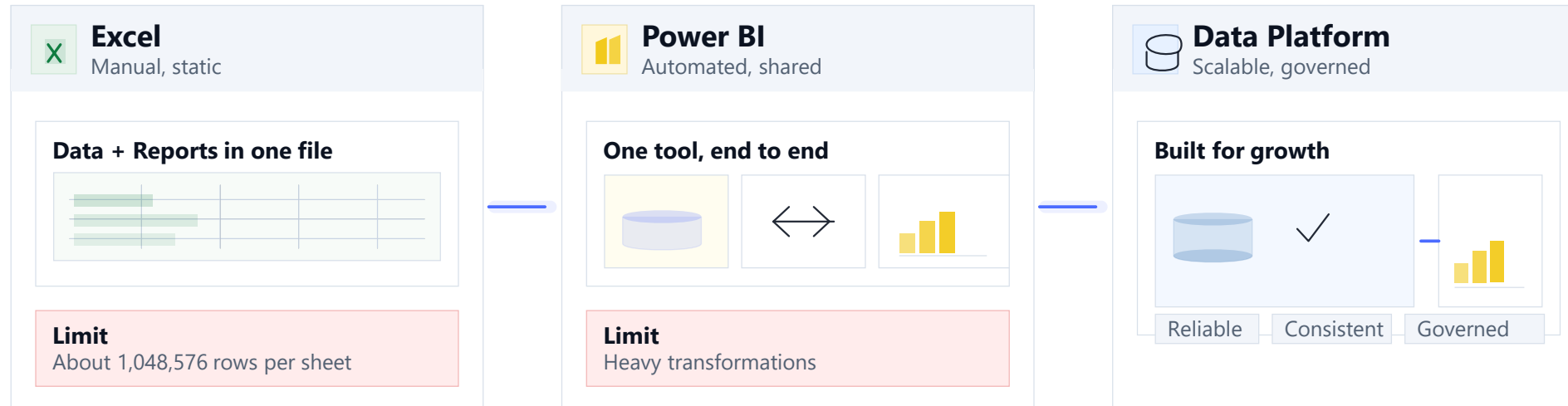
FROM REACTIVE TO PROACTIVE

Tooling Evolves With Data Maturity

A lightweight journey from simple to scalable

Lower

Higher



Start simple, then move up when scale forces it

Start the Journey : Use the tools the meet your immediate needs, but as your organization matures, the tools should

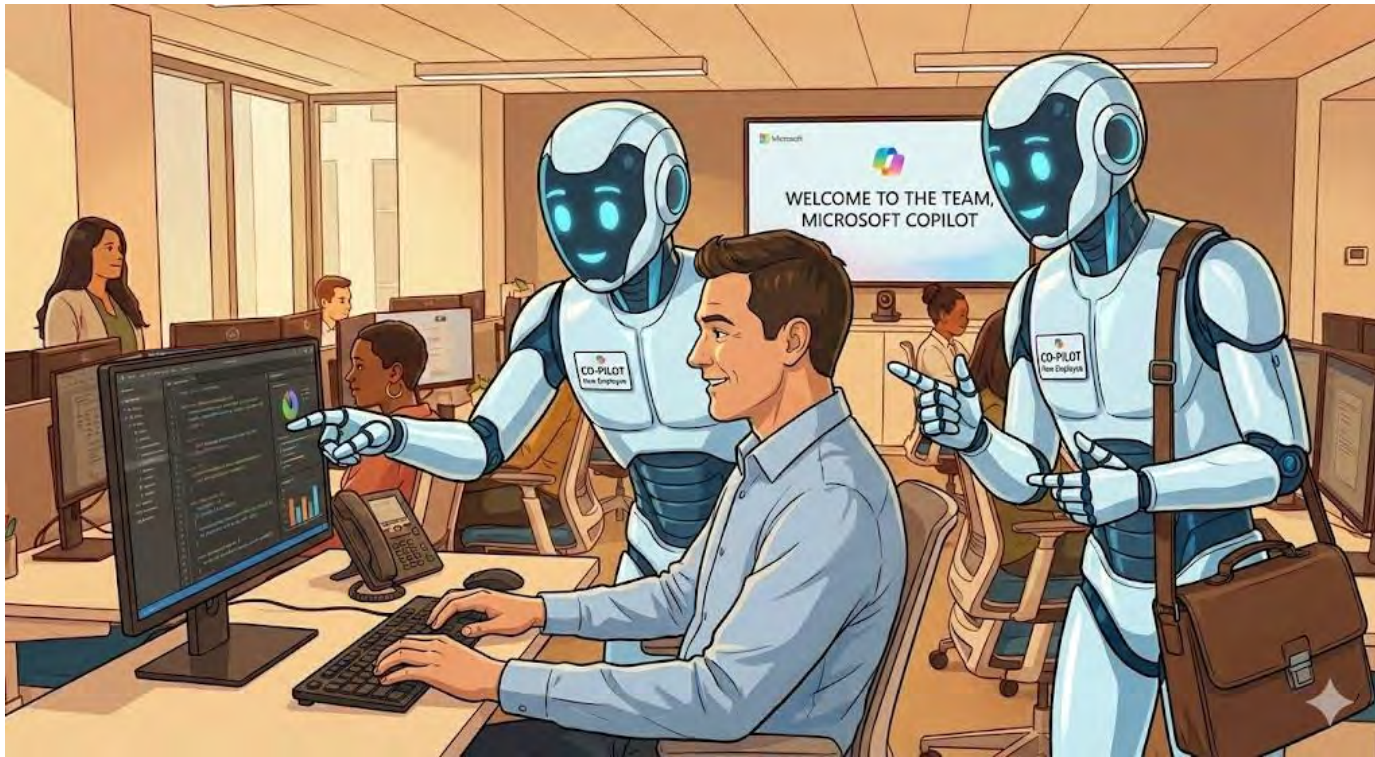
mature alongside. This ensures that you are to appropriate leverage your data to achieve desired business outcomes.

SMARTER, STRONGER AUTOMATION

Power BI + Copilot = Real Time Insights



Meet Copilot: Your Data AI-Ally



Natural Language Interface: Copilot lets users ask questions in plain English, simplifying complex data interactions for everyone.

No Reporting Skills Needed: Users do not need to build complex reports—just type queries and get instant insights with ease.

Accessible Data for All: Copilot empowers everyone to access and act on information, removing barriers to data-driven decisions.

The prompt: "Create an image that personifies Microsoft Copilot - if Copilot were an employee that was newly hired at an office job."

Copilot: Supporting M365 Applications



01 Copilot in Teams



- Provide a summary of the key points discussed in a meeting.
- Develop a meeting agenda based on previous chat conversations.
- Highlight action items, next steps, and decisions made during the meeting.

02 M365 Copilot Chat (Licensed)



- Facilitate creative brainstorming by generating and organizing ideas during collaborative sessions.
- Comparing documents for discrepancies or overlap.
- Finding information.

03 Copilot in Outlook



- Draft emails based on given prompts.
- Adjust emails to fit the desired length or tone.
- Summarize lengthy emails or email chains.

04 Copilot in Word



- Rewrite text to enhance clarity or make it more concise.
- Transform text to match your preferred tone, whether casual or professional.
- Create an initial draft based on a rough outline or other file.

05 Copilot in PowerPoint



- Convert written documents into a polished presentation using company-branded slide templates.
- Create comprehensive speaker notes.
- Condense lengthy presentations into a few key slides.

05 Copilot in Excel



- Create visually engaging data visualizations.
- Analyze trends and explore strategies to achieve desired outcomes.
- Pose questions about your data using natural language.



Conversational Data Analysis

Simplified Data Insights: Conversational interfaces make complex data analysis accessible to users by translating queries into easy-to-understand insights and actionable information.

Guided Analysis Experience: The system suggests follow-up questions, guiding users through deeper analysis and making exploration of data thorough and interactive.



The screenshot shows a user interface for 'Hi Steven', an AI-powered data analysis tool. At the top, the logo 'Hi Steven' is displayed with the tagline 'Uncover insights in your data with the help of AI'. Below this is a search bar with the placeholder text 'Ask a question about your data' and a plus sign icon. The main area contains a grid of nine suggested actions, each with a small icon and a text prompt:

- Find reports about [a topic]
- Prep a summary for my team about NonProfitReport
- What can Copilot help me with?
- Answer a question about data in Taxi Trips fAbrlc
- Summarize key insights in Finance app
- View semantic models related to [a topic]
- Give a quick overview of Inventory app
- Show me [a metric] over time
- Show me apps about [a category]

Nonprofit Data in Action



Executive Overview

FunctionType: All
FiscalYear: All

Net Surplus for Selected Period

8.67M

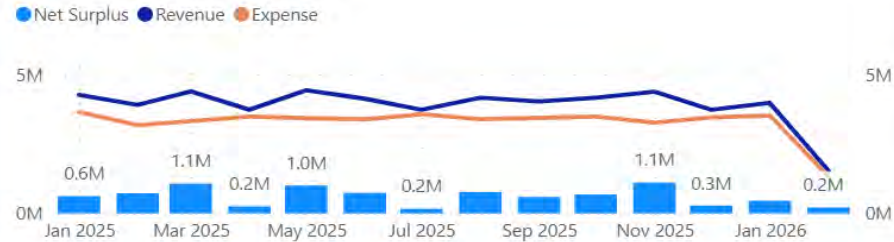
Net Surplus

Budget Variance % for Selected Period

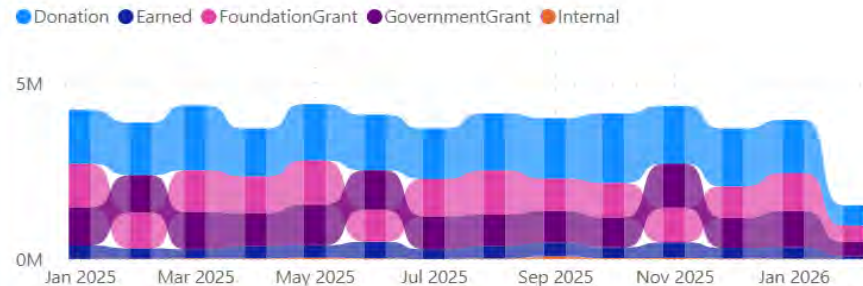
122%

Budget Variance %

Revenue, Expense and Net Surplus



Revenue Mix Over Time



Actual Amount and Budget Amount by MonthName

DepartmentName	Revenue	Expense	Actual Amount
Program Services	4,538,973.22	11,668,116.03	-7,129,142.81
Finance		4,258,041.04	-4,258,041.04
Impact and Evaluation		3,905,634.66	-3,905,634.66
Marketing and Communications		3,741,976.61	-3,741,976.61
Information Technology		2,464,874.00	-2,464,874.00
Facilities		1,771,310.59	-1,771,310.59
Development	7,703,799.40	9,465,738.24	-1,761,938.84
Human Resources		1,728,317.73	-1,728,317.73
Operations	1,888,892.24	3,417,969.55	-1,529,077.31
Grants Management	40,435,170.00	3,474,589.73	36,960,580.27
Total	54,566,834.86	45,896,568.18	8,670,266.68

Net Result by Restriction Type





Nonprofit Data in Action

Targeted Fundraising Efforts: Data analysis helps nonprofits identify and segment high value donors, enabling more effective and targeted fundraising campaigns.

Real-Time Campaign Monitoring : Monitoring campaign performance in real-time enables nonprofits to make agile adjustments and maximize their fundraising impact.

Grant Compliance Metrics: Tracking grant compliance metrics ensures nonprofits adhere to funding requirements and maintain accountability for their operations.

Program Participation Trends : Analyzing program participation trends helps nonprofits optimize outreach, engagement strategies, and improve program effectiveness.

Copilot In Action



Highlight Report Metrics

Copilot can surface features and call outs of existing reports, where you can explore in the chat or link back into the report itself.

[NonProfitReport](#) Summarize this report

Copilot AI-generated content may be incorrect

The organization reported a **net surplus of 8,670,266.68** for the selected period ¹. The **budget variance was 122%**, indicating actual results significantly exceeded budget expectations ².

Net results by restriction type show a **surplus of 20,988,037.13** in temporarily restricted funds, a **deficit of 12,263,959.98** in unrestricted funds, and a small **deficit of 53,810.47** in permanently restricted funds ³.

³ Executive Overview > Net Result by Restriction Type

Restriction Type	Net Result
TemporarilyRestricted	21M
PermanentlyRestricted	0M
Unrestricted	-12M


Explore answer View in report

22



Copilot In Action


[NonProfitReport](#) What company was responsible for the largest donor revenue contribution in May 2025?

 Copilot AI-generated content may be incorrect

To make sure I get you the exact "Donations" amount you expect, which definition should I use for Donations?

- Funding source type equals Donation (based on the fund's funding source)
 - Revenue category equals IndividualGiving (based on the account's revenue category)
- Also, I'll filter to May 2025 and return the top 1 company by Donations with the company name and the amount. Which definition should I use?


Use Donations defined by Funding source type = Donation

 Copilot AI-generated content may be incorrect

This answer was generated from data that hasn't been approved for Copilot use by anyone in your org. Review carefully, as accuracy may vary. [Learn more](#)

Based on the available data, Harbor Helping Hands was the top donor in May 2025 (Funding source type = Donation), contributing 803,317.7. ¹

CompanyName	Revenue
Harbor Helping Hands	803,317.70
Total	803,317.70

 View prompts

Metrics Not Available in Native Power BI Report UI
Copilot can even answer questions that are not part of the native report – by examining the underlying data model to provide a result.

How Copilot arrived at this

You asked: "Filter to May 2025. Define Donations as Funding source type equals Donation (based on the fund's funding source). Show the top 1 company by Donations amount with the company name and the Donations amount. Return as a table."

Data used

CompanyName

Revenue

Filters applied

Top 1 CompanyName by Revenue

FundingSourceType is Donation

MonthName is May

Year is 2025

What Copilot Can't Replace



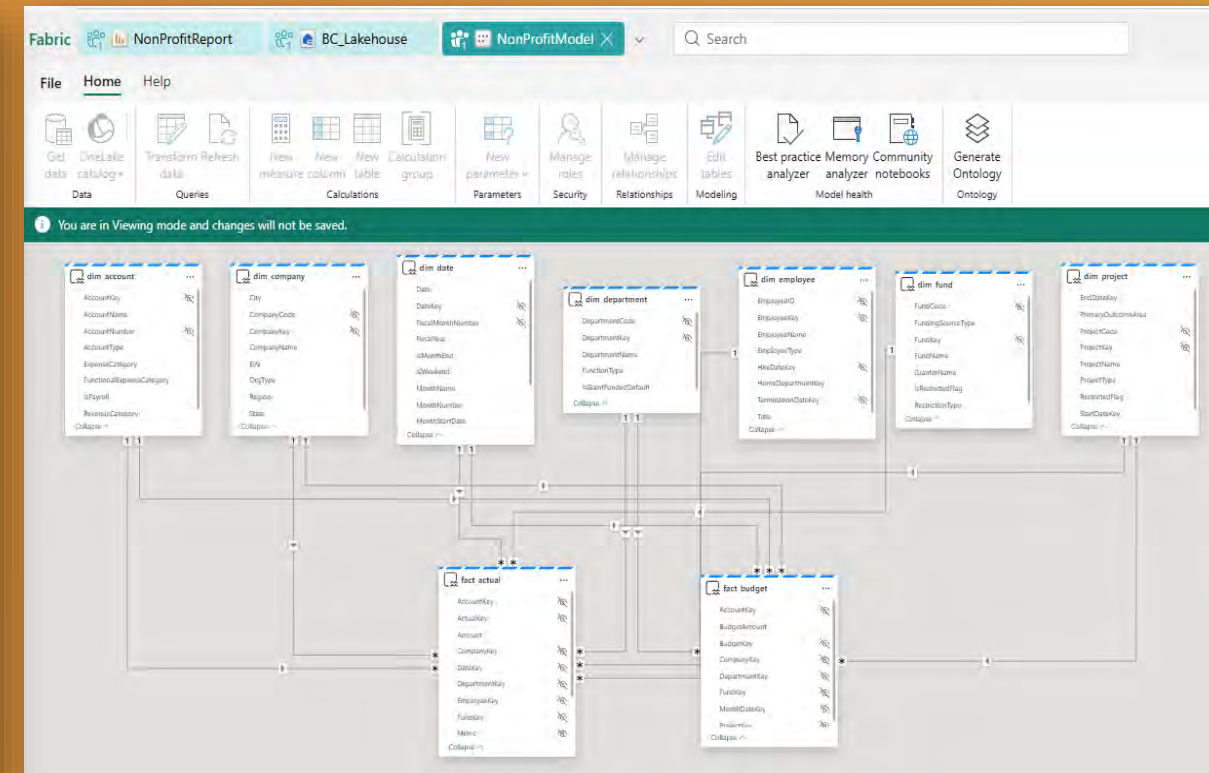
Clean & well-defined data tables

dim_account Showing 27 rows

Table view

	AccountKey	AccountNumber	AccountName	AccountType	RevenueCategory	ExpenseCategory	FunctionalExpenseCategory	IsPayroll
1	2000	4000	Individual Giving	Revenue	IndividualGiving	NULL	Fundraising	false
2	2001	4010	Recurring Donations	Revenue	IndividualGiving	NULL	Fundraising	false
3	2002	4100	Foundation Grants	Revenue	Grants	NULL	Program	false
4	2003	4110	Government Contracts	Revenue	GovContracts	NULL	Program	false
5	2004	4200	Event Revenue	Revenue	Events	NULL	Fundraising	false
6	2005	4300	Earned Revenue	Revenue	EarnedRevenue	NULL	Program	false
7	2006	4400	In-Kind Contributions	Revenue	InKind	NULL	Program	false
8	3000	5000	Program Salaries	Expense	NULL	Salaries	Program	true
9	3001	5010	Program Benefits	Expense	NULL	Benefits	Program	true
10	3002	5100	Client Assistance	Expense	NULL	Supplies	Program	false
11	3003	5110	Program Supplies	Expense	NULL	Supplies	Program	false
12	3004	5200	Program Travel	Expense	NULL	Travel	Program	false
13	3005	5300	Program Professional Fees	Expense	NULL	ProfessionalFees	Program	false
14	3006	5400	Program Technology	Expense	NULL	Technology	Program	false
15	3100	6000	Fundraising Salaries	Expense	NULL	Salaries	Fundraising	true
16	3101	6010	Fundraising Benefits	Expense	NULL	Benefits	Fundraising	true
17	3102	6100	Advertising and Promotion	Expense	NULL	Marketing	Fundraising	false
18	3103	6110	Donor Stewardship	Expense	NULL	Supplies	Fundraising	false
19	3104	6200	Event Costs	Expense	NULL	ProfessionalFees	Fundraising	false
20	3200	7000	Admin Salaries	Expense	NULL	Salaries	Admin	true
21	3201	7010	Admin Benefits	Expense	NULL	Benefits	Admin	true
22	3202	7100	Rent and Occupancy	Expense	NULL	Occupancy	Admin	false
23	3203	7200	Insurance	Expense	NULL	ProfessionalFees	Admin	false
24	3204	7300	Office Supplies	Expense	NULL	Supplies	Admin	false
25	3205	7400	IT Services	Expense	NULL	Technology	Admin	false
26	3206	7500	Utilities	Expense	NULL	Occupancy	Admin	false
27	3207	7600	Professional Services	Expense	NULL	ProfessionalFees	Admin	false

Relationships between tables & measures





What Copilot Can't Replace

Data Governance Necessity: Strong data governance is still required, as Copilot cannot automatically clean or fix messy data.

Importance of Strategic Thinking: Strategic thinking and thoughtful planning remain vital, as technology cannot fully replace human judgment.

Foundation Before Tools: Success depends on foundational processes, not just tools, to ensure credibility and lasting results.



DEMO

Power BI & Copilot

Partnering for Success



Mission-Driven Analytics Alignment

- Analytics are tailored to your mission goals, ensuring every data solution directly supports your objectives and outcomes.

Trusted Data Foundations

- We build reliable, secure data foundations, so your organization can trust the accuracy and integrity of its information.

Empowering Through Analytics Tools

- Staff are empowered with user-friendly analytics tools, enabling data-driven decisions at all organizational levels.

Continuous Optimization and Governance

- We provide ongoing optimization and governance, ensuring data solutions remain effective and compliant over time.

Q&A



Connect with us

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You Can't Spell
Armanino
Without "AI"

Armanino Operates in an Alternative Practice Structure:

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BUILD ANYTHING

AI TOOLS AND GUIDANCE FOR BUSINESS