

## Hi. I'm MISSION CRM, the first donor management and fundraising system built from the ground up on the Microsoft Dynamics 365 platform.

### Looking for a relationship with a CRM system to speed you up, not slow you down?

You're in business to deliver against a mission. But increased competition for funding, escalating needs, smaller budgets and expectations to do more with less makes delivering results difficult. In search of the right technology to address these challenges, nonprofits often deploy donor management and fundraising systems built on proprietary platforms, which make their jobs harder and slow them down.

If you're a modern, Microsoft-based nonprofit, you'll hit the ground running with MISSION CRM. Built on the Dynamics 365 commercial platform, you'll quickly gain momentum because: familiarity accelerates your team's productivity; you'll avoid time-consuming consulting and IT costs to make systems work together, and enjoy the freedom of an enterprise system which scales as you grow.

### You already know my friend, Office 365.

Now, let me introduce you to Dynamics 365. I'm built on Microsoft's Dynamics 365 constituent relationship management platform, and because you're a Microsoft-based nonprofit, I simply build onto your existing foundation. I look like the Office 365 interface you already use, and my native integration with Office 365 makes you feel right at home, right away.

I'm a user-friendly system with everything you need to accelerate the momentum of your donor management and fundraising operations, so you can advance your mission.



### A commercial platform = the Dynamics difference.

Unlike other fundraising software companies which use their own proprietary platforms, MISSION CRM is built on the Dynamics 365 commercial platform.

This means your organization benefits from:

- Microsoft's continual investments in research and development, which results in ongoing improvements and innovations to the Dynamics 365 platform to ensure it adapts to today's needs and remains flexible for tomorrow
- Avoiding steep learning curves; staff and volunteers can struggle to learn the unfamiliar processes and user interfaces of proprietary systems
- Saving significant time and money on consulting and IT costs to get different systems to work together
- Never needing specialist developers or an in-house administrator to manage your system
- An expandable platform; you can choose from a variety of pre-built modules such as Dynamics 365 Financials and Field Service to include the capabilities you want, when your organization needs them

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### A complete system you can actually use.

Donors are the lifeblood of a nonprofit, so at the heart of MISSION CRM is an intelligent, constituent relationship management system with the ability to understand your donors from a 360° view. It's a hub for generating giving relationships by storing valuable information about donors' preferences, motivations and interactions with your organization. And having a holistic picture is vital to propel the virtuous cycle of giving forward, evolving a first-time donor into a permanent philanthropist.



360° donor view



Campaign management



Online giving



Boost productivity



Moves management



Events made easy



Cloud-based



Email marketing



Communications



A natural fit

### Tailored to suit you with seamless integrations and configuration options.

Unlike systems with proprietary platforms, with MISSION CRM you have the power of choice. Tailor the system to suit your organization's needs with seamless integrations and configuration options.



Automatic activity tracking



Financial system freedom



Choose your payment gateway



An expandable ecosystem



Configure the system to suit you



Specialist skills not required

### Delivering an enterprise system which scales with predictable pricing.

Designed to accelerate the momentum of your operations, MISSION CRM is an enterprise system which scales as your organization grows and adapts to your ever-changing needs.



Streamlined processes to support growth



Reports, dashboards and querying



Grow with abandon



Hosted by Microsoft



Role-based workspaces



Predictable pricing

Our all-inclusive pricing includes a subscription to MISSION CRM, Office 365, and unlimited constituent records and emails. So, grow your mission and hit "Ctrl V" on your operations budget.

<b>MISSION CRM System</b> Included Features and Functionality	
<b>SUBSCRIPTIONS PLANS</b>	
Minimum 5 Users \$50 PER USER/PER MONTH CAD	
<b>ALL PLANS INCLUDE THE FOLLOWING FEATURES AND FUNCTIONALITY:</b>	
<b>CORE</b>	
Constituent Relationship Management	✓
Unlimited Records and Unlimited Emails	✓
Web and Mobile Access	✓
MISSION CRM License <small>MISSION CRM is a cloud-based system which is applied to an existing Microsoft Dynamics 365 license/tenant. A Dynamics 365 license is a prerequisite for a MISSION CRM license and are available via TechSoup. If you do not have Office 365 you can license MISSION CRM.</small>	✓
<b>FUNDRAISING</b>	
Campaign Management	✓
Moves Management	✓
Events Management & Ticketing	✓
Campaign Emails and Letters; Constant Contact Integration	✓
Branded Online Forms for Donations and Events	✓
<b>DATA &amp; ANALYTICS</b>	
Pre-built Executive-level and Standard Reports	✓
Role-based Dashboards with Pre-built Visualizations of Key KPIs	✓
Campaign and Event Analysis	✓
Configurable Reports via Built-in Report Wizard	✓
Create your own Queries; Configurable Workflows and Triggers	✓
<b>ACCOUNTING &amp; FINANCIALS</b>	
Integration with any financial system including Dynamics 365 Financials, Dynamics GP and Dynamics NAV	✓
Payment Processing via 3 PCI Compliant Gateways (Moneris, IATS, Authorize.net)	✓
Recurring Donations, Batch Gift Entry, Pledge Processing, CRA Reporting and eRecepting, and Automated Personalized Communications and Mail Merging	✓
<b>MISSION CRM HOSTING &amp; DOCUMENT STORAGE</b>	
Your MISSION CRM System, including Unlimited Records and Emails, is Stored In Microsoft's Data Centre In Canada: Providing Undisputed Security of Data with a Guaranteed 99.9% Uptime, Financially Backed Service Level Agreement. This Includes All Documents Stored In SharePoint and All Documents Stored Against the Constituent Record.	✓
<b>SUPPORT</b>	
Client Portal & Help Desk Ticket Support	Included
Virtual Desktop-Sharing Support via GoTo Meeting	\$50 / per month