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STARTING SOON…

BHFE Solutions

Microsoft Solutions partner

Business Applications

Microsoft Solutions Partner
Digital & App Innovation
Azure
Specialist
Intelligent Automation

New York, NY Boston, MA. San Jose, Costa Rica

BHFE Solutions is a dynamic and innovative consultancy, providing cutting-edge **Smart Automation, AI and Low-Code technology solutions** for organizations of all sizes, in any industry.

BHFE has been trusted by some of the most well-known companies across every sector and continues those relationships today. We bring the experience needed to deliver superior results.

At **BHFE**; We believe in a culture of innovation, excellence, and collaboration.

Our experts are here to listen to your needs, offer advice, answer all questions, and assist you every step of the way. We are very **customer-focused** and highly value integrity, teamwork, and continuous learning.

BHFE Solutions Presents:

Nonprofits Unlock the future with Copilot Studio Autonomous Agents

AGENDA:

- Intro to the Power Platform
- Power Platform Components & Use Cases
- Copilot Agents: Introduction
- Copilot Agents live demo
- Special Offers
- Q & A

How can a nonprofit organization

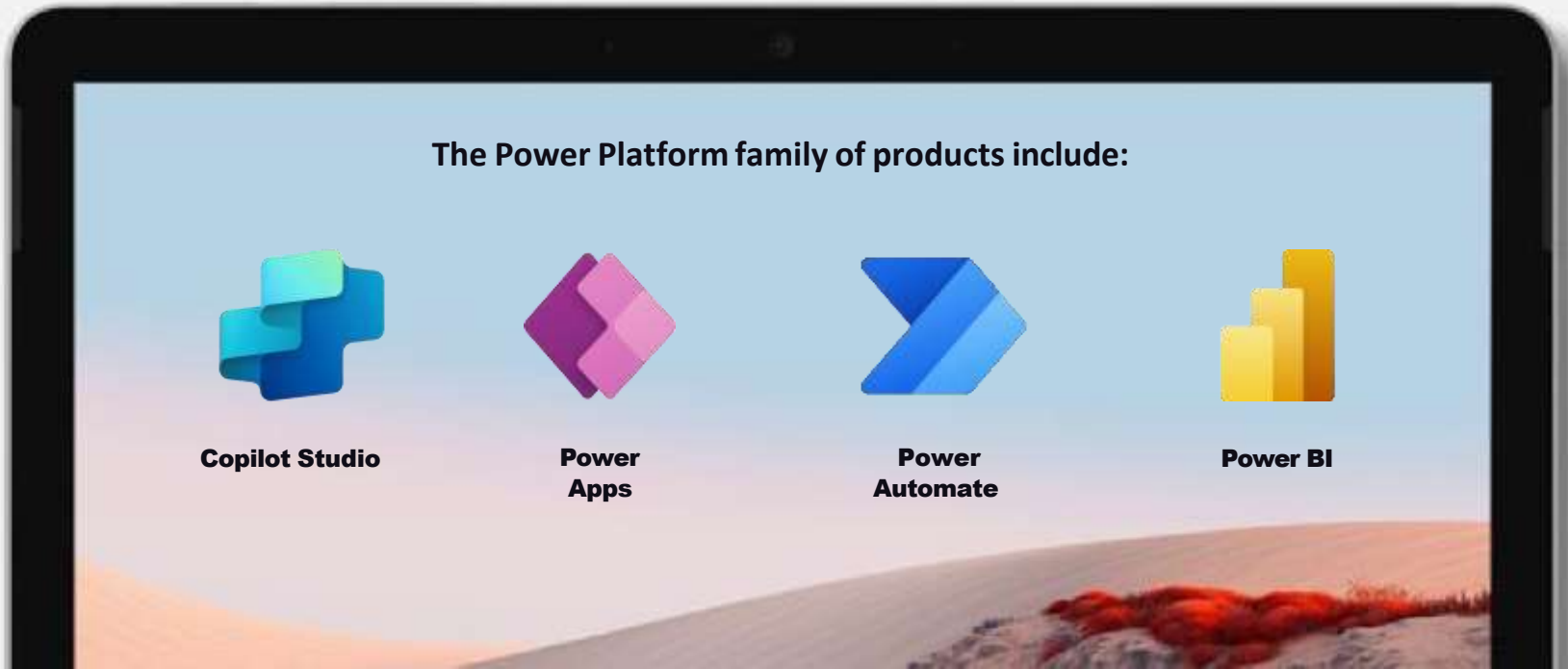
- Increase productivity, efficiency, and compliance
- Reduce errors
- Cut turnaround times
- Save money
- Scale up (or down) with the click of a button

While, at the same time, improving the donor/volunteer/employee experience?

Microsoft Power Platform is a line of business intelligence, app development and app connectivity software applications

Powerful alone. Better together. Microsoft Power Platform is more than the sum of its parts:

Seamlessly connect them together – and to other Microsoft products – to craft holistic business solutions, that align perfectly with your organization's unique needs.



While accessible even for those with only basic coding experience, Power Platform is an exceptionally powerful tool, adopted by industry leaders such as WWF and American Red Cross.

Choosing Microsoft's Power Platform, you'll enjoy

- **Simplicity** The power platform tools are low code and easy for anyone to use, even with limited coding experience.
- **Customization** Tailored solution for your organization's wants and needs, fully customizable.
- **Efficiency** automate repetitive manual tasks, increase efficiency and free up valuable employee's time.
- **Insights** Analyze data and discover trends to make data-driven decisions for your business.
- **Connectivity** Power Platform tools work with other Microsoft products and virtually any other apps/services.

Power Automate

Power Automate stands as a cornerstone within the Power Platform suite.

Power Automate empowers your organization. it can be leveraged to automate routine, repetitive, time-consuming tasks – reclaiming valuable time, increasing productivity, and optimizing overall efficiency.

When implemented correctly, Smart Automation (a fusion of RPA and AI) has the power to transform an industry.

Create custom Automations that can..

- Process grant or expense approvals
- Send event notifications and reminders
- Onboard/offboard volunteers
- Process memberships, registrations, or forms
- Process time off requests and scheduling
- Send donation acknowledgements
- Schedule email marketing and outreach

Power BI

Power BI is an interactive data visualization software product. It's like having a powerful data detective by your side, helping you make smarter decisions.

Power BI helps you turn your data into meaningful insights and visualizations; interactive reports and dashboards, along with data preparation and discovery make it easy to understand what the numbers are telling you.

Create Power BI dashboards that can..

- Track grants, donations, expenses, and budgets
- Monitor volunteer or employee hours and scheduling availability
- Visualize feedback and survey data for real-time insights
- Use advanced graphs and calculations to assist in important data-driven decisions
- Track custom touch points and KPIs for quick and easy reporting and documentation

Power Apps

Power Apps is a suite of apps, services, and connectors, as well as a data platform, that provides a rapid development environment to build custom apps for your custom needs.

Power Apps makes it quick and easy to create an app without the need for writing complex code.

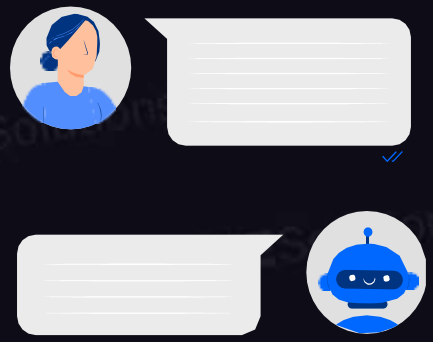
Using **Power Apps** is like building with blocks; you pick the components you need and put them together. These apps can be used on computers, tablets, and mobile phones to solve specific problems or streamline processes.

Create a Power App that can..

- Track and manage volunteer hours and organize events
- Schedule food bank requests or donation pickups
- Digitize donation inventory or equipment management
- Manage employee or volunteer onboarding/offboarding and change requests
- Track and manage cases for caseworkers

Copilot Studio

(Formerly Power Virtual Agents)



Copilot Studio lets you create powerful chatbots for your organization.

These chatbots can be placed on websites or used in messaging apps to interact with donors or volunteers, answering questions, providing information or guidance, and even act on the input provided.

As **Copilot Studio** is a no-code solution, simple bots can be created easily without the need for data scientists or developers.

Create CoPilot Studio agents that can..

- Support customer-facing roles by handling inquiries, providing information and enhancing service delivery
- Organize and manage company data to streamline knowledge sharing and facilitate training for employees
- Automatically read emails or messages and carry out designated tasks
- Assist in self-service solutions for IT support or HR related requests
- Help streamline and automate your personal workflows and day-to-day processes

A new frontier:

Agentic AI

What are agents?

AI designed to perform a task

Tasks can vary in level of complexity and capabilities depending on your need

Simple → Advanced

Generation

Generate summaries, images, audio, and more with an AI model and inputs.

Retrieval

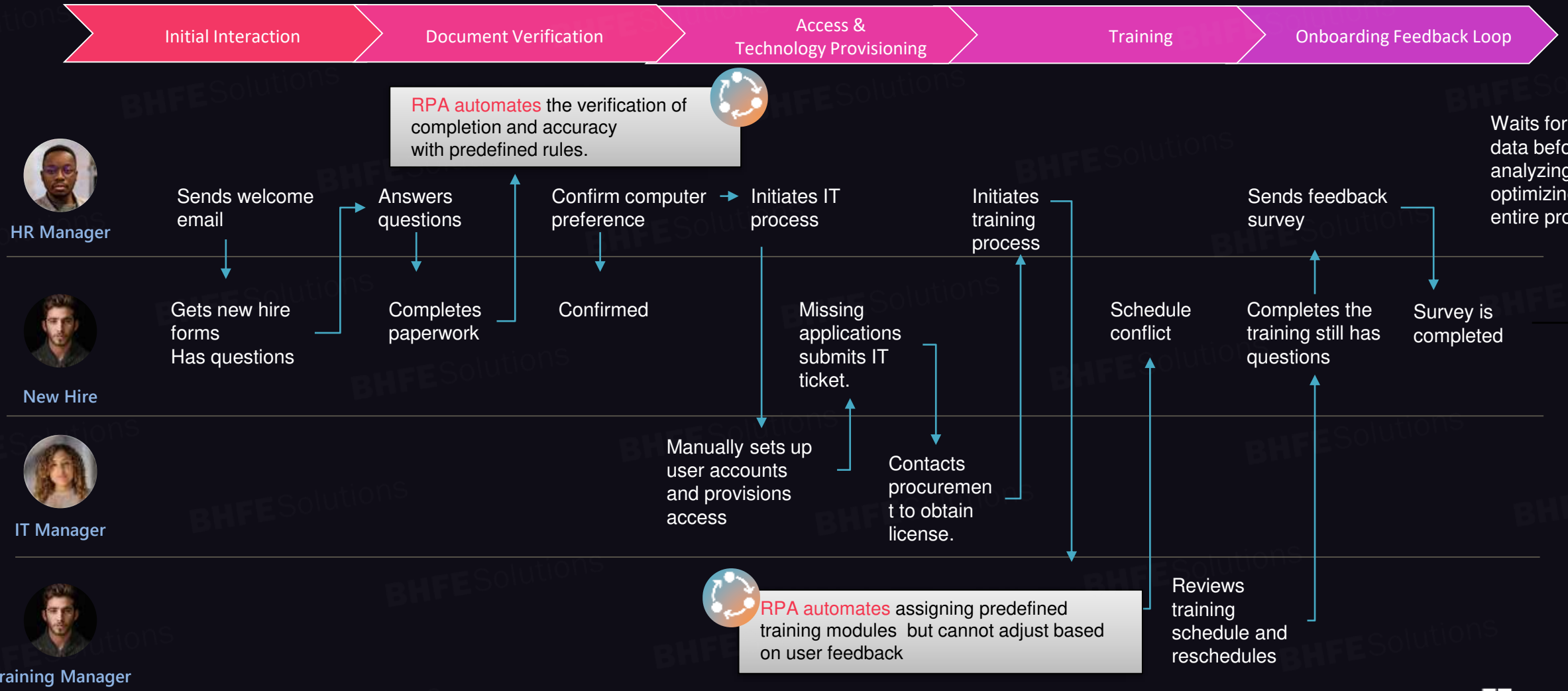
Retrieve information from grounding data, reason, summarize, and answer user questions

Action

Take actions to automate workflows, and replace repetitive tasks for users

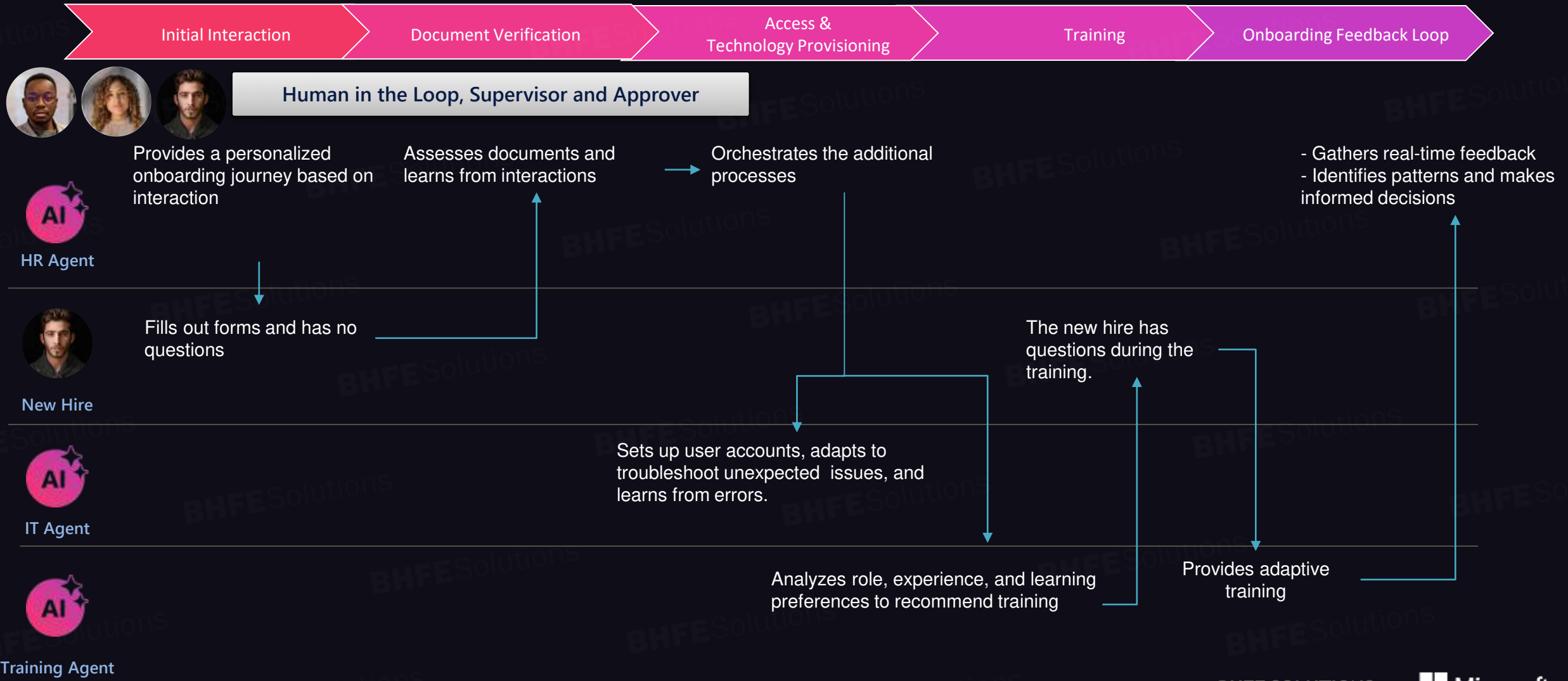
Yesterday

Existing solutions can only automate very specific tasks that have clear inputs and outputs

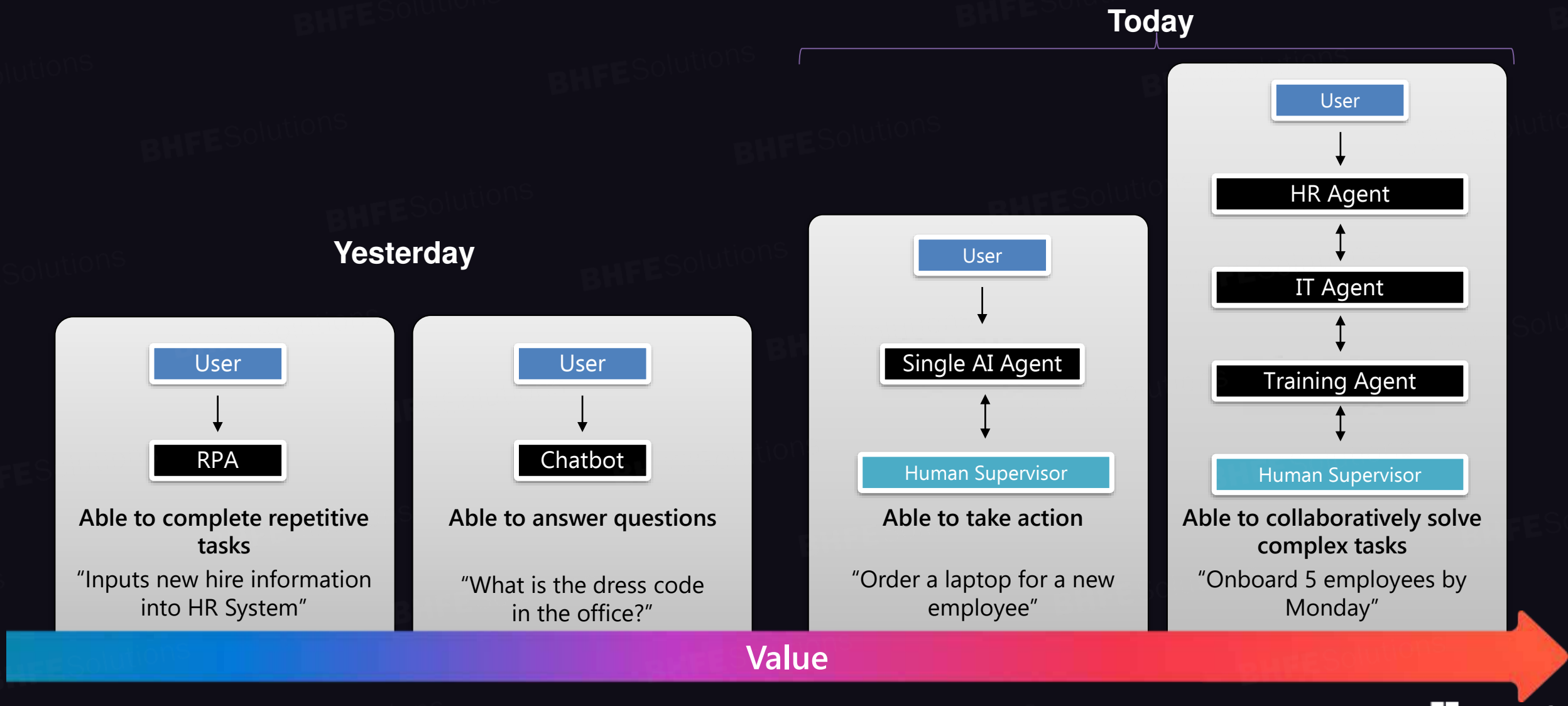


Today

With AI Agents, these steps can be automated for the first time, while keeping human in the loop.



Promising even more efficiency, value, and advantage



Key Applications of

Agentic AI

Key Use Cases for Nonprofits

AI Agent workflows can enhance efficiency, accuracy, and satisfaction

Program & Service Delivery

Volunteer Matching Agent – Intake volunteer skills/preferences and auto-match them to open roles/events, confirming via Teams or email.

Service Eligibility Screener – Guide beneficiaries through questions and auto-determine program eligibility, then schedule appointments or refer them.

Grant Finder Copilot – Accept high-level needs or goals and autonomously search/curate grant opportunities from databases or websites.

Donor & Supporter Engagement

Donor Sentiment Analyzer – Review email/chat engagement to gauge donor interest levels and adjust communication frequency/style.

Recurring Donation Recovery Bot – Detect lapsed monthly donors and send personalized messages to encourage reactivation.

Event Invite Agent – Suggest and send targeted event invites based on donor giving history and proximity to event location.

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Operations & Administration

Board Meeting Prep Assistant – Compile agendas, pull KPIs, and distribute briefing documents before board meetings.

Intelligent Intake Coordinator – For housing/food/job services—automates intake forms, validates info, and pushes to Dataverse or SharePoint.

Volunteer Hours Verifier – Collects hours logged via form/chat, confirms with team leads, and updates CRM records or certificates.

Grant & Fund Management

Grant Reporting Assistant – Pulls required data from Dynamics, SharePoint, or Excel, auto-fills templates, and flags missing metrics.

Budget Reallocation Notifier – Monitors expenses against grant rules and alerts finance or program managers when nearing limits.

Funder Engagement Bot – Tracks communication history and nudges staff to send updates or check-ins at key intervals.

Successfully developing AI Agents requires

4 primary considerations

Knowledge

Providing agents with the right context

Actions

Giving them the tools to complete their tasks

Security

Ensuring they only have access to what they should

Evaluation

Ensuring they complete their tasks correctly

Demonstration

Agentic AI

Our services are split into 4 main areas

Use-case Discovery, Process-mining, Standardization, and Mapping

- Discover which processes are the best candidates for automation, apps or AI solutions
- Quantify ROI: Competitive advantage, error elimination, cost savings and more
- Fully map, standardize and optimize the processes and recommend solutions

Power Platform development

- Development and deployment of automation & AI solutions and apps including dedicated maintenance
- Simple pricing model with predictable costs
- Training and optional Process Design Documents once a project is complete
- "Bug-free" guarantee, as well as the option for continued maintenance

Training & Co-Development

- 3, 5 or 10-day curriculum-based development trainings, designed for beginners
- Hands on training and co-development for advanced users in small groups
- Work alongside administrators, decision makers and SMEs on understanding automation, process discovery, and conveying their needs to the development teams.

Center of Excellence

- Build an internal dedicated team of experts, focused on development, administration, process mapping & discovery and KPI tracking.
- Work with other team members to drive best practices, innovation, and alignment with business goals across your organization.

BHFE offers high quality solutions to organizations of all sizes – We are happy to take on all challenges, small or large.

All our clients are given careful and thorough consultation, and solutions are created for each individual client based on their automation needs, regardless of their size. BHFE delivers tailored solutions considering not only individual project requirements, but also a client´s overall vision, budget, infrastructure and culture.

"When Smart Automation can take a 90-minute process and condense it to 2 minutes, there's not much left to say except "money well spent".

Smart Automation puts time back into my team´s day, eliminates errors, creates efficiencies and reduces headaches. Not to mention, The 300% ROI is beyond what we expected. I highly recommend it "

Randy Steinberg, CFO

"BHFE has been a key partner in our ability to ramp up with the Power Automate platform. They not only have outstanding development skills, creating automation quickly, but have provided consulting that has been integral to establishing our strategy, training our team members, setting up governance, designing our architecture, and launching our RPA COE (Center of Excellence). "

Geoff Reno, VP Continuous Improvement

Nearly 95% of initial clients have long-term, continuing engagements with BHFE once their first project is completed.

Second engagements are typically between 5x-10x the size of the client´s first project with us, and continually grow as we drive value and usage.

Unlock FREE professional services for your Nonprofit, valued at up to $30,000!

BHFE Solutions is partnering with Microsoft in running a new presales incentive program for a limited time, for the Power Platform products specifically.

The program gives your Nonprofit organization access to various rewards and free professional services, including (some, or all):

· Business value assessments
· Envisioning workshops
· Center of Excellence implementations
· Development training
· Solution assessments
· Demos and proofs of concepts
· Development services

Applying for any of these benefits is easy, and absolutely free. We apply on your behalf, and once approved - Microsoft pays us to give you professional services - anywhere from $1,500 of value and up, based on your qualification. Many of our clients have received 5 figures in value.

Receive significant Nonprofit discounts and rebates for Microsoft licenses!

Your Nonprofit will receive up to a **75% discount** on the majority of Microsoft licenses, including D365 and Power Platform.

We are also offering a special rebate for all Microsoft license purchases through us, that can be used towards **any** of our professional services!
(*For yearly license purchases)

Contact us for further details!

Q & A

Sign up for a 1:1 FREE consultation HERE to learn more about discounted Microsoft licensing and

Every applicant qualifies automatically for a Needs Assessment workshop (a $1,500 value), and nearly everyone qualifies for further funding and discounts as well.

With any questions, feel free to reach out to us:

Contact Us

Sales@BHFEsolutions.com

877-4-RPA-BOT

BHFE Solutions