

A practical AI guide to helping UK charities increase productivity and mission impact.



Dedication to advancing a mission keeps your team focused on service, improving outcomes, and delivering for the community.

To expand their impact, charities and social impact organisations are finding ways to do more by working differently. By increasing the efficiency of core processes, you can free your team to focus on the organisation's vital efforts.

Charities in the UK are discovering how AI reduces manual work, enhances business communications, and turns number crunching into insightful analysis – all while keeping data safe and secure. We make modern technology simple, guiding charities with honest, clear advice that enables them to improve outcomes and better serve their communities.

Microsoft 365 Copilot is your fastest route to AI that can transform the way your organisation runs. If your team uses Microsoft 365, you have access to AI tools that some of your staff may already be familiar with. Our specialists will help you take advantage of AI solutions at your own pace and choose add-on tools as needed to fit specific objectives.

Insight

Copilot is the AI companion embedded in Microsoft 365 that helps automate routine tasks, analyse data, and provide contextual assistance across daily workflows.



It's natural to have questions about how AI can work for your organisation. This guide for UK charities will help you move forward with confidence, whether you're in the initial phases of exploration, ready to implement additional AI applications, or experienced with AI and searching for even more productivity improvements.

Look inside for:

- ✓ **Strategies for each stage** of your AI journey
- ✓ **Real-world AI** use cases for charities
- ✓ **Answers** to security and data compliance questions
- ✓ **Practical steps** for making the next move



Charities that get value from Copilot don't treat it as cost-cutting. They treat it as mission protection. By streamlining the stuff that's consuming hours of manual work, you're freeing people to do what they came to do."

Lewis Thomson, AI Workforce Lead and Microsoft Copilot MVP, Phoenix Software



64%

64% of employees lack time and energy to do their job.

3.5X

Those employees are **3.5x more likely to struggle** with strategic thinking.

60%

60% of leaders say a lack of innovation is a concern.

70%

70% of employees are willing to delegate work to AI.

Where are you on your AI journey?

“

Most charities are small teams wearing multiple hats. People are juggling roles they weren't hired to do, because the work needs doing. When you're stretched thin, every hour spent filling in spreadsheets or writing grant applications is an hour you're not supporting vulnerable people.”

Lewis Thomson, AI Workforce Lead and Microsoft Copilot MVP, Phoenix Software

Knowing where to start with AI means understanding where you currently are. You may already have team members experimenting with AI, or perhaps you've identified opportunities for revamping processes.

If you've held off on implementing AI in your organisation because you still have a lot of questions, you're not alone. Many charities are in the same place.

At Phoenix Software, we've identified three stages that reflect what we hear most often from charities. Use this chart to determine the current state of your organisation's AI deployment and then look ahead to see additional possibilities for enhancing mission strength and momentum.

Stage 01

Getting started with AI

- When it comes to AI, you're curious but prudent about what it means for your data and your beneficiaries.
- Your stewardship includes being smart about budget considerations, and you want to understand what's possible before committing.
- Although you have Microsoft 365, you haven't yet rolled out Copilot, or you're not clear about what's included.



What's next:

AI adoption may be as simple as using AI in the tools you already rely on every day.

What first steps can look like:

Use Copilot to find and summarise information and then draft content – all within existing workflows or systems.

Use case:

Copilot helps create plain language summaries, simple fact sheets, and guides for charities supporting people with disabilities, digital access issues, and varying levels of literacy.

Outcome:

Beneficiaries have consistent, accessible communications without any additional licence cost.



Copilot is built into the Microsoft 365 tools your team already uses, including Word, Outlook, and Microsoft Teams.





Stage 02

Expanding AI with confidence

- A handful of people are getting value from Copilot licences, though not everyone is using it consistently.
- You're looking for an opportunity to expand, but have questions about governance, compliance, and data security.
- You need to demonstrate impact before making the case for further investment.
- You want to know which workflows are the best to automate first.



What's next:

To expand usage, look for ways to apply AI within more teams and workflows.

What first steps can look like:

Choose recurring processes where AI can deliver the most value while establishing clear governance and building confidence in how Copilot uses data.

Use case:

Mental health counsellors take time to write notes, risk assessments, and treatment plans. Documentation is part of the job, but it keeps them from doing actual therapy.

Outcome:

Copilot handles the paperwork with set levels of security and governance. The practitioner gets more time to focus on care.

Stage 03

Scaling the impact of AI

- You have significant Copilot adoption across your organisation.
- Copilot is delivering value, but you know there are additional possibilities to support your team.
- You're intentional about AI adoption and want to identify whether the next step is agents, Copilot Studio, or something else.
- Some internal teams may have onboarded quickly before security foundations were fully established.



What's next:

You're probably ready to extend AI beyond individual productivity and into connected, end-to-end workflows.

What first steps can look like:

Apply AI across processes to support more consistent, scalable operations.

Use case:

A youth charity was spending too much time applying for grants. Each funder required different criteria, metrics, and reporting templates, limiting how many opportunities could be pursued each year. With a Copilot agent that accesses organisational data, case studies, and outcomes, they can now tailor grant proposals in a fraction of the time.

Outcome:

The charity is able to pursue more funding opportunities and expand its potential impact.



Know your AI options.

While AI adoption has grown rapidly in recent years, many organisations are still using it primarily for basic queries and prompts.

Now, some of the most impactful productivity gains are coming from AI agents that help automate repetitive tasks and workflows. These AI-powered assistants can help extend your team's capacity by supporting everyday work, helping staff save time, stay organised, and scale their impact more effectively.

Both Copilot and AI agents are available with Microsoft 365. Many organisations are already using Copilot to simplify meetings, research, and communications. Agents can also help streamline operational tasks and routine processes, helping work move forward more efficiently and consistently – giving staff more time to focus on mission-driven priorities and the people and communities they serve.



What's the difference between Copilot and agents?

Copilot: For employees



Every employee has Copilot, their personal assistant for managing email, meetings, and documents.

Agents: For processes



Any organisational process can be improved and accelerated with an AI-powered agent that works based on actions, triggers, and knowledge.

Agents: More than a sidekick

When agents are integrated into organisational processes, they can help reduce time spent on repetitive and time-consuming tasks. For example, an agent can quickly retrieve information, summarise it, and answer questions, helping staff work more efficiently. Phoenix partners with not-for-profit organisations to identify workflows that can be automated with agents designed to support repetitive tasks and processes.

Even when an agent is deployed, users remain in control of how they operate. You decide whether the agent responds only when prompted or operates independently within defined boundaries, including dynamically planning, working with other agents, learning, and escalating issues when needed.

Here are four ways Copilot agents are supporting not-for-profits:

The CAF story

Neil Heslop is CEO of the Charities Aid Foundation, which provides over £1.1 billion annually to around 250,000 charities in 100 countries. Neil has been blind since his twenties. Reading strategic reports, email threads, and complex policy documents used to take hours with screen readers and the help of his support manager. Now, Neil asks Copilot questions and gets summaries in minutes – giving him more time to focus on leading the organisation.

Impact reporting

Most charities have multiple funders, each wanting different impact metrics. This often means staff spend valuable time adapting reports instead of focusing on programme delivery and impact. Copilot can automatically pull outcomes data into each funder's preferred template, helping organisations maintain consistency, streamline reporting, and free up more time for mission-focused work.

Case files

Social workers, safeguarding practitioners, and domestic abuse support workers often spend a significant portion of their week writing and updating case files – time that could otherwise be spent directly supporting people. With Copilot agents tailored to an organisation's risk frameworks, procedures, and policies, practitioners can simply describe a situation and receive a well-structured draft case note in minutes. One Phoenix customer reduced the time spent on each case file from 90 minutes to 20 minutes, creating more time for meaningful support and care.

Volunteer management

Volunteer recruitment, onboarding, training, and safeguarding responsibilities are often managed alongside someone's existing role. Copilot can generate consistent onboarding materials, draft role descriptions, and support administrative tasks and documentation. One crisis support service used Copilot to assist with volunteer training, significantly reducing onboarding time while improving consistency in how safeguarding practices were covered.

Data and security: the foundations of scalable AI.

Employees embrace AI with enthusiasm and confidence when they know the organisation's data is reliable and protected.

That's why it pays to review how your data is structured, shared, and governed before taking the next step. This review often surfaces opportunities for best-practice improvements that should be implemented before the next incremental AI deployment.

Insight

Clear data boundaries help AI deliver more relevant, trusted results. Content accumulated in multiple locations over years of Microsoft 365 use can cause AI to return unintended results. Copilot offers the visibility and tools to resolve oversharing.



Data readiness checklist

Fundamental data management principles become increasingly vital when organisations are using Copilot and agents. Before turning tasks over to AI, employees want to be assured that information is accurate, current, and accessed within compliance guidelines.

Strengthening data protection must be an ongoing activity:

- **Perform** a permissions audit to ensure users only have access to the information they need.
- **Review** how information is shared across teams to help safeguard sensitive data.
- **Establish** clear procedures for onboarding, guest access, and special access requests.
- **Set standards** for how data is labelled, stored, accessed, and retained.
- **Regularly review** permissions and content that may need updating.
- **Ensure** data standards remain consistent across systems connected to AI tools.
- **Communicate** data governance rules and expectations to all employees.

Layers of security

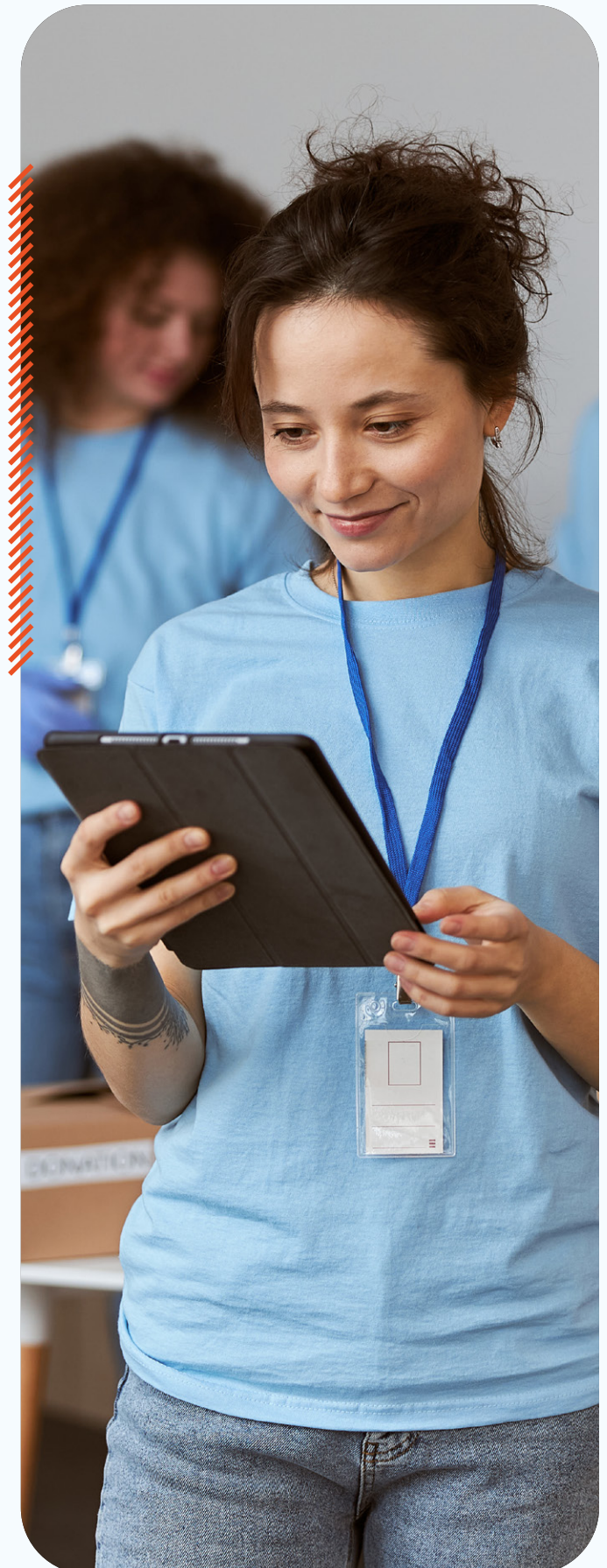
Phoenix enables organisations to implement a highly secure environment for Copilot and AI agents using the Microsoft security framework. Each layer of security reinforces the next, starting with permissions that define individual access using Microsoft Entra ID, then adding access reviews and search restrictions in SharePoint to control data oversharing.

Microsoft Purview is a suite of data governance, security, and compliance solutions that acts as a central hub for data discovery, classification, and loss prevention. Data Security Posture Management (DSPM) provides continuous visibility, risk scoring, and posture insights. And by using Microsoft Agent 365 and Copilot Studio, governance is ensured through approval workflows.

The final layer, which includes training, use policies, and internal AI champions, is embedded in the Phoenix process.

Insight

Copilot is an organisation-centric AI assistant. Data remains securely within your Microsoft 365 environment, with all sensitivity labels and policies automatically respected. You can rest assured that your organisation's content is not used to train external AI models, and access always follows existing user permissions.



Adopt AI with confidence and clarity.

While some of your team may already be experimenting with AI, adopting it across your organisation takes thoughtful planning to achieve outcomes that help advance your mission.

This means first defining what success looks like, whether that's streamlined processes, faster reporting and decision-making, or better content and communications.

By taking a clear, structured approach to connecting technology adoption with training and engagement, Phoenix helps charities translate Microsoft 365 Copilot and AI-powered agents into tangible productivity gains. We combine deep Microsoft expertise with hands-on experience in UK charity data requirements including GDPR, Gift Aid, and Charity Commission obligations. Our experienced guidance is grounded in your reality.

- **Identify** and empower early-access champions – trusted pioneers who will share their experiences.
- **Deliver** continuous learning through role-relevant training, workshops, and on-demand modules.
- **Embed** AI into everyday workflows and demonstrate benefits with visible impact.
- **Measure** progress by reviewing both usage data and employee feedback. Look for adjustments that will make a difference.
- **Lead** visibly from the top by reinforcing the organisation's AI vision, sharing productivity wins, and encouraging safe experimentation.
- **Celebrate** successes by highlighting early wins and real-world stories.

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“

Not everyone loves AI. Some people worry about it. You have to bring people along and show them how it's reducing their workload.”

Lewis Thomson, AI Workforce Lead and Microsoft Copilot MVP, Phoenix Software





Ready to take the next step?

Book a 30-minute discovery call so we can understand where you are and help you design your AI journey.

Book your call today



Frontier Partner



Specialist
Copilot



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