



## The Nonprofit's Guide to Microsoft Outlook

### About Connect Cause

Connect Cause empowers nonprofit organizations by delivering reliable, affordable, and mission-aligned technology solutions. We specialize in managed IT services, cybersecurity, Voice over IP (VoIP), cloud infrastructure, and application development, all tailored specifically for nonprofits. With flat-fee pricing and unlimited support, our nonprofit clients never have to choose between staying secure and staying on budget. From IT strategy and project management to cloud migrations and database development, our experts ensure technology becomes a success driver, not a roadblock. We partner with leading software vendors to offer exclusive nonprofit discounts, and we manage every aspect of technology, on premises or in the cloud, so nonprofits can focus on what matters most: their mission. Whether you're a growing nonprofit or a national organization, Connect Cause helps you do more with less through strategic IT leadership and responsive support.

### Simple ways to stay organized, responsive, and focused on your mission

Nonprofit teams wear a lot of hats. Between donor communication, program coordination, volunteer management, and internal collaboration, your inbox can quickly become overwhelming.

Microsoft Outlook is more than just email. When used effectively, it becomes a central hub for communication, scheduling, and organization, helping your team stay focused on what matters most: your mission.

Inside this guide, you'll discover how to:

- ▶ Organize your inbox so important emails never get missed
- ▶ Reduce clutter using simple built-in tools
- ▶ Stay responsive without constantly checking email
- ▶ Turn emails into tasks and calendar events
- ▶ Maintain a professional and consistent brand in every message
- ▶ Protect your organization from spam and security risks

### ▶ Why Outlook Matters for Nonprofits

For many nonprofits, email is the backbone of daily operations. Outlook helps you:

- ▶ Keep communication organized and easy to find
- ▶ Stay on top of deadlines and meetings
- ▶ Reduce inbox clutter and distractions
- ▶ Respond quickly to donors, volunteers, and partners
- ▶ Turn emails into actionable tasks

When used intentionally, Outlook can shift your team from reactive to proactive.



## Start with a Cleaner Inbox

A cluttered inbox leads to missed messages and unnecessary stress. These tools help you take control.

### ► Use the Sweep Feature to Reduce Clutter

If you receive frequent emails from the same sender (newsletters, updates, notifications), the Sweep feature lets you quickly clean them up.

- Delete all past emails from a sender
- Keep only the most recent message
- Automatically manage future messages

This is especially helpful for staff managing high-volume inboxes like info@ or development@.

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### ► Create Search Folders for Quick Access

Search folders act like smart filters. Instead of digging through your inbox, Outlook groups emails automatically based on criteria you choose.

- Unread donor emails
- Messages with attachments (grant documents, reports, etc.)
- Emails flagged for follow-up

This saves time and ensures nothing important slips through the cracks.

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## Advanced Security Protection

Cybersecurity threats have changed dramatically over the past few years. Today, most security breaches are no longer caused by traditional viruses but instead by:

- Phishing emails
- Account takeover attacks
- Email compromise
- Ransomware delivered through user interaction
- Stolen credentials reused across platforms

To protect the organizations we support, Connect Cause utilizes an **Advanced Security Protection** bundle that includes:

- Managed Detection & Response (MDR) with 24/7 security monitoring
- Endpoint Detection & Response (EDR) across all devices
- Security Awareness Training for your users
- Written security policies customized for your organization





## Stay Responsive Without Being Overwhelmed

Timely communication is critical, but it shouldn't come at the cost of constant interruptions.

### ► Schedule Emails to Send Later

**Working late or across different schedules? You can write emails when it's convenient and schedule them to send at the right time. Use this for:**

- Donor outreach at optimal times
- Team updates during work hours
- Campaign announcements

This helps maintain professionalism while giving your team flexibility.

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### ► Set Up Automatic Replies

**When you're out of the office, whether for a conference, vacation, or fieldwork, automatic replies keep communication flowing. A strong automatic reply should:**

- Let people know when you'll return
- Provide an alternate contact if urgent
- Reassure senders their message is important and will be read

This is especially useful for small teams where responsiveness matters.

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### ► Snooze Emails to Focus

**Not every email needs immediate attention. Snoozing lets you temporarily remove messages from your inbox and bring them back when you're ready.**

- Focus on priority tasks without distractions
- Revisit emails when they become relevant
- Manage follow-ups without clutter

It's a simple way to stay organized without losing track.

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## Best Practices for Using Microsoft Outlook Every Day

Check your email at set times, not constantly

Use folders or categories to stay organized

Flag or snooze emails that require follow-up

Keep messages clear and concise

Regularly clean up your inbox

Schedule emails thoughtfully

Use a consistent email signature across your organization

Set automatic replies when you are away

Be cautious with suspicious emails

Create tasks right away so nothing gets lost

When you build small habits like these into your daily routine, Outlook becomes more than just an inbox. It becomes a tool that supports your mission instead of slowing it down.





## Work Smarter with Everyday Outlook Tools

Small features can make a big difference in how your team communicates and manages time. These tools help reduce mistakes, improve clarity, and keep your day moving.

### ► Undo Sent Emails

We've all sent an email too quickly. Outlook gives you a short window to undo that mistake. Here's how it helps:

- Fix errors before partners/donors see them
- Avoid sending incomplete information
- Reduce stress when working quickly

Turn this on so every email has a short delay before sending. It gives you a built-in safety net.

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### ► Highlight What Matters with Formatting

Conditional formatting lets you visually highlight certain emails so they stand out in your inbox, ensuring that important messages don't get buried. Use it for:

- Emails from key donors or board members
- Messages marked as urgent
- Specific team members or departments

Instead of digging through your inbox, important messages are easy to spot right away.

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### ► Use Polls to Make Decisions Faster

Need quick input from your team, board, or volunteers? Polls in Outlook make it easy to get input without sorting through replies. Examples for nonprofits:

- Board availability for meetings
- Volunteer scheduling
- Internal team decisions

Instead of long email threads, you get clear responses in one place.

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### ► Customize Your Swipe Options

On your mobile device, swipe gestures can help you quickly take action on emails. You can customize swipes to:

- Delete emails
  - Snooze messages
  - Mark as read
- Move emails to folders

When your team can manage email quickly on the go, small tasks don't pile up into bigger problems later.

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## Build Consistency and Professionalism

Every interaction reflects your organization. Outlook helps you maintain a polished, consistent presence.

### ► Create a Professional Email Signature

**Your email signature is more than a sign-off, it's a branding tool. It should include:**

- Your name and role
- Your organization's name
- Contact information
- Website and social links

A consistent signature builds trust and makes it easier for donors and partners to connect with you.

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## Protect Your Organization

Cybersecurity is a growing concern for nonprofits. Even small actions in Outlook can make a big difference.

### ► Report Phishing and Suspicious Emails

**If something looks off, it probably is. Reporting spam/phishing emails helps:**

- Protect your inbox from future threats
- Reduce risk of phishing attacks
- Keep your organization's data safe

Encourage everyone at your organization to stay cautious and report anything suspicious.

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## About Connect Cause

Accredited Managed Services Provider

State-of-the-Art Operations Center with Cutting Edge Technology

24 / 7 / 365 Remote Help Desk and On-Site Support

24 / 7 / 365 Real-Time Network Monitoring

Experienced, Certified Technicians and Engineers

Dedicated Account Managers

Predictable Monthly Cost, Scalable Level of Service

Remote Resolution of Issues More than 90% of the Time

Easy to Understand Graphical Reporting of Performance

Reduces IT Operational Costs by Up to 70%

## IT For Nonprofits

Connect Cause works exclusively with nonprofits, so we understand the unique IT needs of organizations like yours.

If your board is not confident in these areas, let's start the conversation.

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