wavex



EMPOWERING

NGOs and Charities Through

AI-Driven Efficiency and Cost Reduction

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THE BUSINESS

In the London NGO and charity sector, the gap between mission-critical frontline work and the mountain of required documentation is widening. Teams are currently trapped in a high-stakes cycle of manual reporting, managing everything from grant applications and impact reports to complex corporate partner DDQs. With the Charity Commission and statutory auditors raising the bar for transparency, the manual tax on small teams has become unsustainable. This is more than an administrative burden; it is a strategic risk that threatens the speed of funding and the accuracy of safeguarding, GDPR, and ESG compliance.

The friction is most visible when 'key person risk' meets fragmented data. Vital institutional memory, the core of every successful bid, is often locked in the minds of senior leaders or buried in disparate Word, PDF, and Excel files. This fragmentation forces senior staff into first-draft mapping and data extraction, creating a bottleneck that slows down time-critical funding bids. When a donor expects a 48-hour turnaround on a complex questionnaire, a manual, person-dependent workflow is no longer a viable option for a modern NGO.

Without a transition to a governed, scalable data model, organisations face a cycle of diminishing returns. The inability to rapidly reuse historical knowledge and standardise compliance language leads to inconsistent messaging and missed opportunities. For forward-thinking NGOs, the priority has shifted from person-dependent drafting toward a system-driven approach that secures institutional memory and ensures every response is audit-ready and mission-aligned.





The Challenge

The firm faced a growing operational burden driven by manual administrative work. Critical knowledge was siloed with a few individuals, creating resource bottlenecks and inconsistent responses for DDQs and investor requests. Initially, they considered the 'blunt' step of enabling generic Microsoft 365 Copilot chat, but identified several strategic risks:

- **Erosion of Confidence:** Users receive broad, unfocused responses that lack traceability to trusted sources.
- **Inflated Investment:** High per-user fees for generic tools often fail to solve specific process bottlenecks.

Example: M365 CoPilot for a 50-user firm is approximately £1,000/month*1.

- **Lack of Targeted Expertise:** Without a well-scoped knowledge base, generic AI lacks the specific expertise required to solve complex firm requirements.
- **Inefficient Scaling:** Teams remain frustrated by having to manually 'clean up' generic outputs, leading to higher costs and pushing staff toward public AI tools that rarely comply with company GDPR policies.

Example: A purpose-built CoPilot Agent (PAYG) for a 50-user firm represents a negligible monthly cost until reaching high-volume thresholds (e.g., 25,000 messages/month)*2.

Within this context, the organisation turned to Wavex to demonstrate a more practical, controlled, and cost-effective approach to AI.

> Choosing generic CoPilot chat over purpose-built CoPilot Agents is like staffing your entire organisation with one capable generalist instead of a team of specialists. Specialists outperform, scale better, reduce risk, and ultimately cost less and the same is true for AI

> Most organisations have already built strong foundations through Microsoft 365, yet many are choosing expensive, poorly configured chatbots rather than streamlined, focused Agents. In doing so, they risk higher costs, weaker outcomes, and increasingly frustrated teams.
>
> **Gavin Russell, CEO of Wavex**

The **Wavex Solution**

To solve these challenges, Wavex delivered a focused Microsoft Copilot Studio PoC with a well-defined scope: automating a 200-question Excel workbook using training documents from previous submissions. The Agent was engineered to read trusted internal sources and capture citations for absolute auditability.

Wavex spent a few weeks to deliver an AI Agent Proof of Concept

Working closely with stakeholders, Wavex built a tailored AI Agent capable of:

Seamless Interaction: Engaging staff through Microsoft Teams while providing continuous progress updates.

Intelligent Extraction: Interpreting structured and semi-structured documents to extract precise field level data.

Automated Workflow: Updating Excel tables programmatically with near instant updates and high-speed performance.

Operational Governance: Logging errors and evidence for troubleshooting, ensuring every answer includes mandatory quotes and confidence levels.

> Every company will become an AI company
>
> **Satya Nadella, CEO, Microsoft**



The Delivery Framework

Wavex executed a three-step model to move from concept to executive ready demonstration within weeks, ensuring high-value output under strict security.

Measurable Objectives

Success was defined by clear KPIs for the 200 question workbook:

- **Accuracy:** Target of 70–85% correctly populated fields using only approved data.
- **Reliability:** Maintaining a hallucination rate of less than 10%.
- **Efficiency:** Achieving a 50–70% reduction in time spent on baseline administrative tasks.

Structured Development Lifecycle

The project was managed through a six-stage timeline designed for rapid iteration and feedback:

Scope and field selection | Document preparation | Copilot Agent build | Testing and tuning | Executive demonstration | Support and refinement

Before commencement, based on prior experience, Wavex defined an expected 90% likelihood of achieving a fully functioning model within these parameters, provided client prerequisites were met.

Data Governance & Zero-Trust Controls

A strict 'trusted sources only' boundary was enforced. The AI Agent was only permitted to use a curated set of internal documents, with each AI generated entry required to include:

- **A Source Reference:** Identifying the origin of the data.
- **A Quote or Excerpt:** Providing raw text for human verification.
- **A Confidence Level:** Flagging items for specialist review and enabling model improvement.



The **Result**

The AI Agent PoC proved that a controlled approach delivers immediate value, completing in minutes what previously took weeks, an outcome not achievable with generic Copilot alone.

- **Major Time Savings:** Auto-populates complex RFIs and due-diligence packs in minutes by reusing organisational knowledge with minimal correction.
- **Improved Quality & Consistency:** Enforces 'no hallucination' rules and verifiable sourcing, ensuring every answer improves through a continuous human feedback loop.
- **Auditability & Compliance:** Every field includes mandatory evidence trails and citations to ensure strict compliance and facilitate human oversight.
- **Repeatability & Scalability:** Uses flexible prompt-based mapping rather than complex training, allowing the model to adapt quickly to diverse business cases.
- **Augmented Human Expertise:** Removes the burden of first drafting from senior staff, allowing experts to focus on high-value strategy and negotiation.

Through this focused augmentation, the firm has built a competitive, agile, and future-ready infrastructure.

> Artificial intelligence is not just about efficiency gains; it's about opening up new possibilities, unlocking human potential, and solving some of society's biggest challenges.
>
> **Yoshua Bengio, Computer Scientist and Turing Award Laureate**





Conclusion

Wavex successfully demonstrated how a controlled, measurable approach to AI delivers immediate value while building readiness for broader transformation. By focusing on a practical, repeatable business process and enforcing strict governance, the project proved that AI can significantly reduce manual workload and accelerate time to value.

Remarkably, the total cost of this project, including the deployment of the purpose built Copilot AI Agent, was less than the organisation's existing monthly spend on general purpose M365 Copilot licenses.

Next Steps: Your Free AI Assessment

Could your business benefit from Forward Thinking IT?
Our AI Assessment helps organisations identify high value opportunities for automation and efficiency.

What is covered:

- **Actionable Insights:** Clear recommendations on the top 5 areas most suitable for AI Automation.
- **Estimated impact:** Return on investment balancing the development cost against the short-term benefits.
- **Strategic Roadmap:** A prioritised implementation plan aligned with your business objectives aligned to "quick wins", short-term initiatives, and long-term initiatives.

Speak to one of our sector specialists for a free AI Assessment and ensure your business remains competitive, agile, and "Forward Thinking".

About **Wavex**

Founded in 1998, Wavex is a pioneer in delivering forward thinking managed IT services, empowering organisations to embrace innovation with confidence. As a leader in CoPilot Agent solutions, we help businesses unlock the full potential of AI while ensuring robust security, risk and compliance.

Our approach is flexible and collaborative; we can operate as your complete IT department or seamlessly complement your existing team. Through a combination of delivering exceptional day-to-day support, strategic guidance, and cutting edge technology, including the innovative Wavex security platform, we provide unparalleled transparency and control.

We partner with ambitious, forward-thinking businesses to enhance efficiency, reduce risk, and drive sustainable growth. At the heart of everything we do is a commitment to improving user experience and delivering measurable value.

AI isn't an IT decision anymore. It's a productivity, profitability, and survival decision

[1]*prices accurate as of February 2026

[2]*Accurate as of February 2026