wavex



## Streamlining Property

# Portfolio Management and Compliance Via Intelligent Automation

Microsoft Tier-1 Cloud Solutions Provider | Microsoft Partner | Cyber Security Excellence Awards Finalist 2019 | ISO 27001 Certification Europe | intl WINNER Azure Partner of the Year 2018 | Cyber Essentials Plus | IT Europa Excellence Awards 2019 Finalist

# The Business

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London property businesses operate in a high-velocity, heavily regulated market where the speed of a response often dictates the success of a deal. Teams are under constant pressure to satisfy rigorous due diligence questionnaires (DDQs), investor requests, and ESG disclosures, alongside mandatory AML and KYC compliance filings. As transaction volumes increase and regulatory scrutiny tightens, the reliance on a small number of subject matter experts to manually handle these queries creates severe operational bottlenecks. This traditional approach leads to rising overheads, slower deal cycles, and an increased risk of inconsistencies across tender documents (RFIs/RFPs) and client onboarding processes.

The operational friction is most acute during the extraction and mapping of data from fragmented Word, PDF, and Excel files. Vital information for sustainability reporting and portfolio queries is frequently trapped in legacy documents, forces teams into cycles of duplication. This lack of a structured knowledge base slows down time-critical funding processes and forces senior leaders to pivot away from strategic asset management to oversee the drafting of property management responses.

Transitioning to a governed, automated model allows firms to standardise tone, messaging, and compliance across all outgoing communications. By programmatically mapping questions to validated internal knowledge, businesses can empower junior staff to produce high-quality first drafts, ensuring every response is backed by a verifiable audit trail. This modernisation significantly reduces the administrative burden of procurement and portfolio reporting, enabling firms to meet demanding timelines for investors, councils, and tenants.







# 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.

> 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**

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





# 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