

From Chaos to Clarity

Navigating NFP Transformation in the Age of AI

Webinar Series 1 of 3



Acknowledgement of Country

What We'll Cover Today

30 minutes to a clearer path forward

- The NFP reality: Why the sector feels overwhelmed right now
- A real story: How one organisation went from a single request to a full platform transformation
- A practical framework: The 4-Stage Business Review as your clarity engine

NFP Challenges

The reality today

Case Study

Client transformation

The Framework

4-Stage Business Review

What's Next

Clarity enables AI

Educational, not sales-led - practical insights you can act on

The NFP Reality Today

Four forces creating chaos



Information overload

Teams drowning in manual processes, spending more time on admin than mission-critical work



Fragmented technology

Siloed systems with no single source of truth, creating duplication and confusion



Underutilised investment

Paying for platforms and licenses but only scratching the surface of what's possible



AI pressure without a plan

Boards asking about AI but with no strategy to adopt it safely or meaningfully

“Most organisations don’t lack tools - they lack a clear roadmap”

Sound Familiar?

A quick self-assessment for your organisation

1

We have systems our team have stopped using

Paid licenses sitting idle, shadow IT filling the gap

2

Our teams spend more time on admin than impact

Manual reporting, duplicated effort and process bottlenecks

3

We've been asked about AI but don't know where to start

Board or leadership expectations without a clear adoption roadmap

4

Our technology decisions feel reactive, not strategic

Buying tools to fix symptoms instead of addressing root causes

5

We know there's a better way, but lack time to find it

Transformation is on the wish list, not the action plan

Real Story: The CRM Wasn't the Real Problem



From one system request to a clearer transformation roadmap

What they asked for

- A Legal Services CRM
- Better case and client management
- A technology solution to improve operations

What we discovered

- Teams were working in silos
- Similar challenges existed across the organisation
- Security and Microsoft 365 foundations needed attention
- People could see symptoms, but not always the cause

The challenge wasn't the technology — it was understanding the real problem first

What the Review Uncovered

Bringing the organisation into the conversation

Teams felt heard

- Staff could openly discuss challenges
- Pain points became visible
- Issues were no longer hidden within individual teams

Shared understanding

- Teams realised many challenges were organisation-wide
- Problems were connected, not isolated
- A common picture began to emerge

Confidence and alignment

- Greater confidence in the direction
- Clearer priorities
- Stronger organisational unity

Sometimes organisations know the symptoms, but they don't yet know the cause

The Roadmap That Emerged

Once there was clarity, the priorities became easier to see



Security Foundation

Security uplift completed before new applications were introduced



Connected Workplace

Microsoft 365, SharePoint, Teams and calling brought together to reduce fragmented ways of working



AI Readiness

Copilot enablement planned as part of the broader transformation, not as an afterthought



Legal Services CRM

The CRM delivered on a stronger, more secure and better-aligned platform

The CRM became part of a broader transformation roadmap, not a standalone fix

Why a Structured Approach Matters

Moving from reactive decisions to strategic transformation

Technology is rarely the whole problem Most challenges span people, process and technology

Transformation works when everyone is involved Shared understanding drives better decisions and buy-in

Foundations matter Address security, governance and collaboration before AI and new systems



This is why Lanrex uses a structured 4-Stage Business Review — understand the full picture before investing in technology

The 4-Stage Business Review

Your roadmap from chaos to clarity - structured, phased and measurable

1

Strategic Consultation

Clarify priorities and define direction

- Align tech with business goals
- Define priorities and success measures
- Surface pain points and opportunities
- Draw out themes & recommendations

2

Technology Audit

Understand current state

- Review systems, tools and infrastructure
- Assess performance and scalability
- Identify gaps and inefficiencies
- Establish a clear baseline

3

Security Assessment

Strengthen resilience and reduce risk

- Evaluate security posture
- Identify vulnerabilities and gaps
- Review controls and governance
- Prioritise risk remediation

4

Technology Leadership Plan

Enable Action

- Deliver phased, practical roadmap
- Prioritise initiatives by value and risk
- Provide executive decision guidance
- Define next steps and outcomes

Outcomes

What you'll walk away with

1

A clear, plain-English view of your technology environment

No jargon, no assumptions - a genuine snapshot of where things stand

2

Prioritised risks and opportunities

Knowing what to fix first and where the quick wins are

3

A leadership-ready technology roadmap

A practical plan your board and leadership team can actually act on

4

Clear next steps and decision points

Defined actions with owners, timelines and priorities

5

A trusted partner who walks beside you

Guidance through execution, not just a report that gathers dust

What Clarity Makes Possible

From foundations to future-ready

1

Copilot adoption that actually works

AI deployed on a clean, secure, optimised platform

2

Consolidated technology stack

Fewer tools, lower costs and a single platform your teams actually use

3

Data-driven decisions

Reliable reporting and insights because your information lives in one place

4

Stronger security and compliance posture

Governance frameworks built in from day one, not retrofitted under pressure

5

More time for mission

Less admin, less firefighting - more capacity for the work that matters

67% of Australian NFPs are already using generative AI,
yet only **14%** have an AI policy or guideline in place.

Key Takeaways

What to remember and what's next

01 You're not alone

The challenges you're facing are shared across the NFP sector — and they're solvable

02 Structure beats speed

A phased, discovery-led approach delivers better outcomes than jumping to solutions

03 Your platform has untapped value

Most NFPs are using a fraction of what they're already paying for in Microsoft 365

04 Clarity enables AI

Getting foundations right now positions you to adopt Copilot and AI with confidence

NEXT STEP → Register for Webinar 2 - Unlocking Copilot for Your Organisation

Coming Up: Unlocking Copilot



Webinar 2 preview

Live demonstrations See Copilot in action across real NFP scenarios

Use case prioritisation Identify where AI delivers the biggest impact for your roles and teams

Readiness assessment Understand what foundations need to be in place before you switch it on



Each session builds on the last — attend all three for the full picture

NEXT IN THE SERIES

Unlocking Copilot for Your Organisation

- Live demonstrations
- Real NFP use cases
- Practical readiness checklist

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WEBINAR 2 REGISTRATION

