

STARTING SOON

# We'll begin shortly

Giving everyone a few minutes to join.

WHILE YOU WAIT

## What repetitive task would you most like to reduce?

From Copilot to Agents

Practical AI for the Not-For-Profit sector | Webinar 3 of 3



### Housekeeping

- Attendee microphones and cameras are off
- Meeting chat is disabled
- Use the Q&A panel to send questions at any time
- We'll answer questions during the Q&A at the end
- Polls will be launched throughout the session and remain open until the webinar concludes

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## Acknowledgement of Country

Lanrex acknowledges the Traditional Custodians of the lands on which we meet today. We pay our respects to Elders past and present and extend that respect to all Aboriginal and Torres Strait Islander peoples.

# Welcome

Lanrex + Microsoft Elevate AI Webinar Series

## About Lanrex

Australian Microsoft partner helping organisations achieve more through technology.



Consulting & IT Strategy



Data, Copilot & AI



Microsoft Business  
Applications



Cyber Security



Cloud & Modern  
Workplace



Managed IT Services

## Ellen Hunter

Customer Growth Manager

Helping organisations bridge the gap between where they are today and where they want to be through technology.

LANREX + MICROSOFT ELEVATE

# From Copilot to Agents

By the end of this session, you'll understand how to:

1

Understand agents

2

See one in practice

3

Assess readiness

4

Identify where to  
start

One useful agent solving a real problem is more valuable than multiple disconnected AI experiments.

# Where we've been, where we're going

A series built around one consistent principle



Each stage builds the capability and confidence required for the next.

POLL

Live audience poll | choose one answer

# How would you describe your organisation's AI journey?

Pick the option that best describes where you are today.

☐ Just exploring AI

☐ Trialling AI tools

☒ Using AI regularly

☐ Developing an AI strategy

PART 1 OF 4

# Understanding agents

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What an agent is, how it differs from Copilot, and where it creates value.

# Copilot versus an agent

The simplest distinction: helping with a task versus supporting a defined workflow.



## Copilot

Helps a person complete a task

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Responds to a user prompt

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Produces an answer or draft

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The user directs each interaction

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The person reviews the output



## Agent

Supports a defined workflow or outcome

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Responds to a request or agreed trigger

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Connects steps to produce an outcome

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Works within defined instructions and boundaries

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Human oversight should match the risk

**Copilot helps me do my work. An agent can help manage a defined piece of work.**

# Where agents create value

Look across the whole process, then identify where effort and value concentrate.



## Grant funding

Assess opportunities, identify evidence gaps and prepare application drafts using approved organisational knowledge.



## HR onboarding and policy support

Guide onboarding and answer common questions using approved policies and organisational information.



## Volunteer coordination

Support volunteer onboarding, respond to common enquiries and coordinate routine activities.



## Reporting & administration

Prepare reports, identify gaps and reduce manual effort.

**Start with the end-to-end process, not the technology.**

POLL

Live audience poll | choose one answer

# If you could explore one AI agent for your organisation, where would you start?

Pick the area with the clearest day-to-day impact.

- ☐ Grant funding
- ☐ HR onboarding and policy support
- ☒ Volunteer coordination
- ☐ Reporting and administration
- ☐ None of these areas are relevant yet

PART 2 OF 4

# Agents in practice

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One grant funding workflow, from initial assessment to a review-ready application draft.

# The grant funding challenge

One process, multiple effort points.



Where does your organisation spend the most effort?

# Meet the Grant Funding Agent

The agent prepares and recommends. People verify, decide and approve.



## The agent helps to

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Review a funding opportunity

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Assess potential eligibility and alignment

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Identify gaps in available evidence

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Incorporate additional supporting information

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Prepare a review-ready application draft using the playbook



## People remain responsible for

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Confirm eligibility and interpretation

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Verify source information and evidence

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Decide whether to pursue the opportunity

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Provide and validate missing information

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Review, approve and submit the application

**Agents support the workflow. People remain responsible for outcomes.**

LIVE DEMONSTRATION

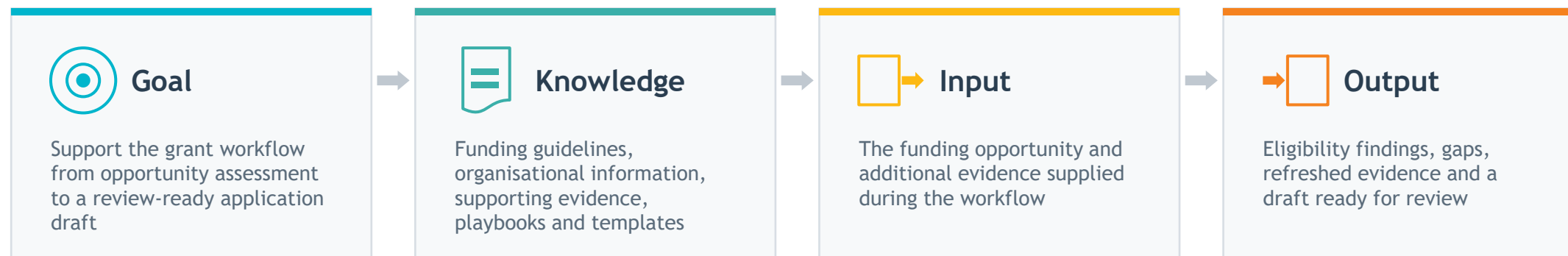
# Grant Funding Agent

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From opportunity assessment to a review-ready application draft.

# Debrief: what made the agent useful?

Four elements, anchored by human accountability.



## ACCOUNTABILITY

People verify eligibility and evidence, decide whether to proceed, and review, approve and submit the application

Useful agents connect defined steps using trusted knowledge, while keeping people accountable for the outcome.

PART 3 OF 4

# Readiness and guardrails

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What must be true before you build, and what must stay true once it is live.

# Readiness and guardrails

What must be true before, and what must stay true after



## Before you build

- 1 **Outcome** - does solving this create meaningful value?
- 2 **Knowledge** - is it reliable and appropriately accessible?
- 3 **Workflow** - is there a clear process the agent can support?
- 4 **Risk** - what is the impact if the output is wrong?
- 5 **People** - are those affected informed and involved?



## Once it's live

- 1 Clear scope and an accountable owner
- 2 Appropriate security and permissions
- 3 Human oversight matched to risk
- 4 Ongoing monitoring and improvement
- 5 Transparency about where AI is used

**Readiness is a judgement about the process, not the technology.**

POLL

Live audience poll | choose one answer

# Where would your organisation be comfortable using an agent?

Choose the level of autonomy your organisation would be comfortable with today.

- ☐ Draft content for human review
- ☐ Analyse information and highlight patterns
- ☒ Make a recommendation for human approval
- ☐ Complete a defined low-risk action within agreed rules
- ☐ I would need more information first

PART 4 OF 4

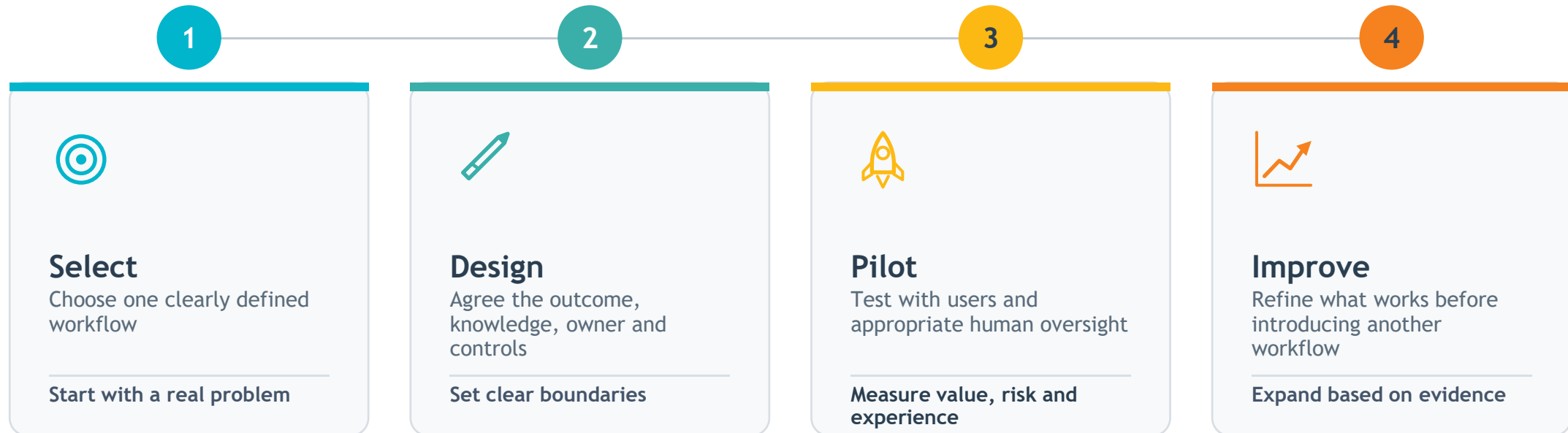
# Where to start

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How agents fit the roadmap, and the first practical step for your organisation.

# Your first agent: a practical pathway

Start narrow, test it and improve before expanding



One workflow done well is more valuable than multiple disconnected experiments.

# What repetitive task in your organisation would you most like to reduce?

*Remember the question from the start? Now it's your turn.*

Think about the work that consumes time, creates friction or regularly gets pushed down the priority list.

**Enter one or two words in the poll.**

# Where do you start?

Three questions to guide your first use case.

*Each step earns the right to the next - start narrow, prove it, then expand.*

1

## Is the use case clear and worthwhile?

Start with a defined problem where reducing effort or improving consistency would create meaningful value.

**One problem, one workflow**

2

## Are the boundaries agreed?

Define the knowledge, instructions, owner, access and level of human oversight.

**Ownership and oversight agreed**

3

## Is there evidence it is working?

Review value, risk and user experience before expanding.

**Evidence before the next step**

POLL

Live audience poll | choose one answer

# What support would be most useful next?

Pick the option that would help your organisation most.

- ☐ Understanding our AI readiness
- ☐ Identifying and prioritising agent use cases
- ☒ Strengthening governance and policy
- ☐ Exploring a practical agent for our organisation
- ☐ Continuing to learn and explore

# Questions?

Over to you, here's how to keep the conversation going.

## Ready to explore your first use case?

Book a 30-minute discussion with Lanrex to identify practical opportunities and sensible next steps.



SCAN TO BOOK

## Help shape future sessions

Your feedback helps us improve future webinars, resources and events.



SCAN FOR FEEDBACK