



methods   
**CASE STUDY**

# Replacement grants management system

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**The National Lottery Heritage Fund is the largest dedicated funder of heritage in the UK.**

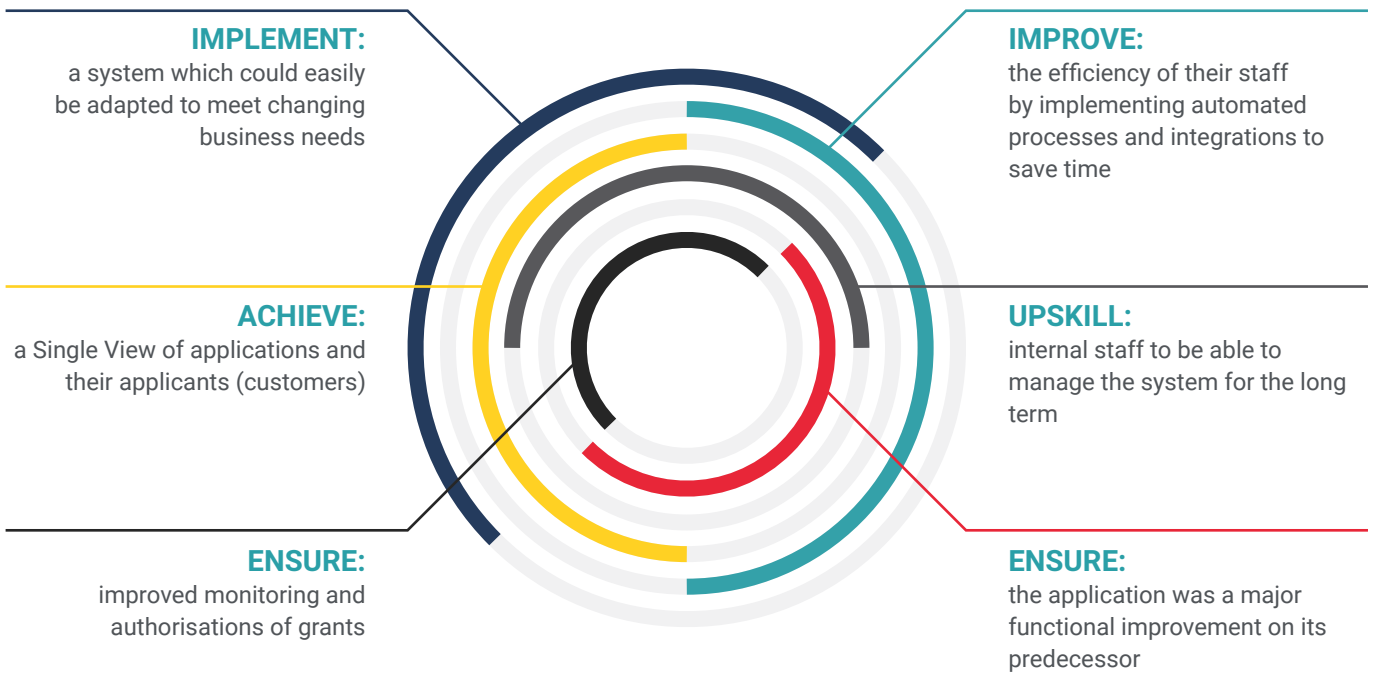
We believe that understanding, valuing and sharing our heritage brings people together, inspires pride in communities and boosts investment in local economies.

- We distribute National Lottery grants from £3,000 to £5million and over, funding projects that sustain and transform the UK's heritage
- We provide leadership and support across the heritage sector, and advocate for the value of heritage

# CHALLENGE

NLHF had been using their custom built grants application and management system since 2008. It had become quite unstable and had reached its end of life. The Fund found in Salesforce a solution which was secure, stable, easily customisable, and easy to support. With Methods they found a partner able to understand their needs, integrate into their team and deliver functionality meeting their redesigned processes.

Their goals and critical success factors for the project were to:



## WHY DID NLHF CHOOSE METHODS?

NLHF engaged with Methods due to our digital transformation experience with Salesforce within the public sector. Methods brought a wealth of Salesforce knowledge and skill across all Salesforce clouds, and within all disciplines from delivery management and configuration, to integration and development.

The Methods team assigned to the NLHF project had together successfully delivered numerous projects and were familiar with the key NLHF deliverables. This small team-experienced team approach is Methods' hallmark approach to Salesforce projects.

# SOLUTION

The team initially conducted a fixed-price, two week discovery to understand the current processes and plan a roadmap for project success. Methods proposed a data model using as many standard Salesforce objects as possible - utilising 'clicks not code'. The aim was to capture the Grant Application process and everything that falls from it in a single account view. This data model made the grant application process more structured and easier to understand than the existing architecture.

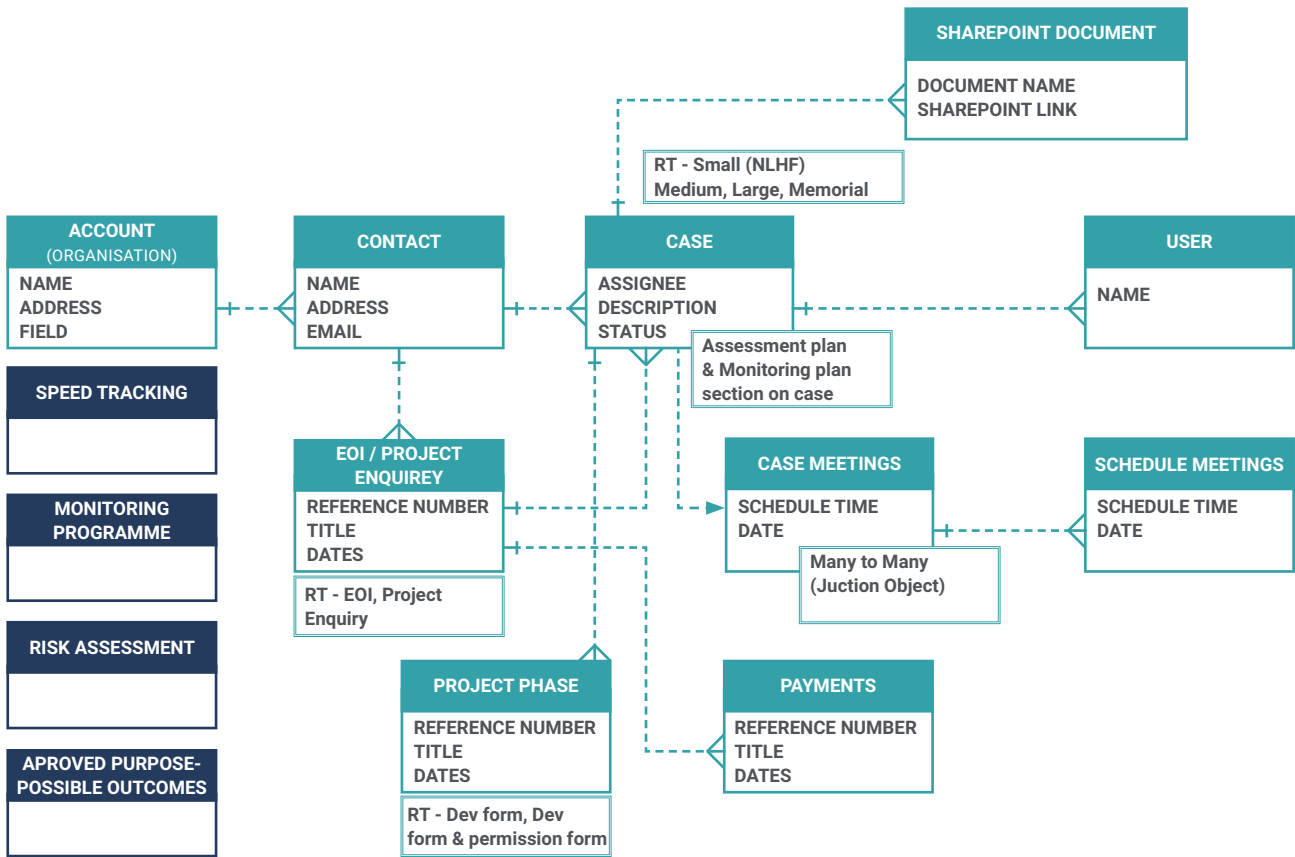


Figure 1: National Heritage Lottery Fund grants application process - new architecture

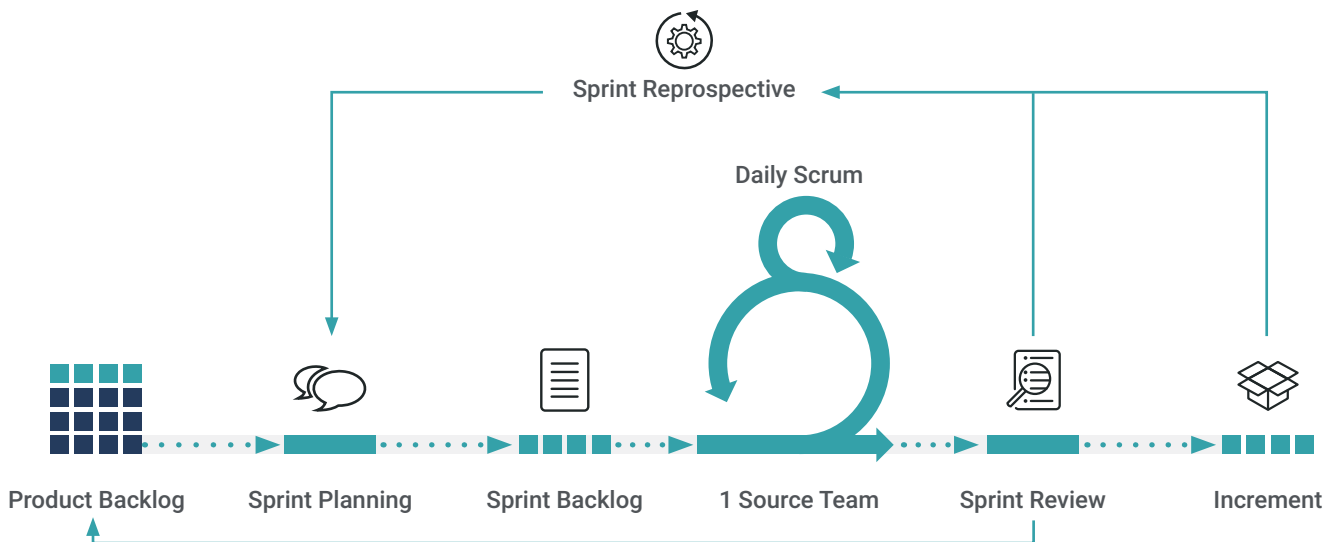


Figure 2: Delivery Methodology

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## RESULTS

The NLHF project was successfully delivered on time and to budget in less than five months, achieving the key deliverables of the project. Integration was completed to a bespoke In-House developed Customer Portal as well as to Outlook, with a Proof of Concept to SharePoint, ready for use when the new SharePoint comes online.

The project first went live to a Beta group in Feb 2020 with very positive feedback. The application allows the Fund to process grant applications and to monitor and report on these applications in ways not possible before.



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Delivered on time  
& to budget in less  
than five months



## WHAT WAS METHODS' ADDED VALUE?

Methods, with their experience and expertise in the public sector space was able to quickly get up to speed, adapt to the Fund's culture, and work with the Fund team to deliver a successful and complex re-structuring project.

The Methods team, used to working together on previous projects, was able to hit the ground running, quickly integrating themselves into the process design team, enabling Methods to deliver iterative functionality at pace in controlled sprints. Our small team approach ensured high quality and project velocity. NLHF requested that Methods provide on-going support to the new system for two years through one of our flexible Managed Service plans.



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# methods III



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✉ [Info@methods.co.uk](mailto:Info@methods.co.uk)

☎ 020 7240 1121

🌐 [www.methods.co.uk](http://www.methods.co.uk)