



## The Robertson Trust

**With Salesforce.com handling many administrative tasks, this Scottish grant-making organisation can focus its efforts on providing the best possible support to hundreds of charitable projects throughout Scotland.**

The Robertson Trust, an independent grant-making Trust based in Scotland, asked Capgemini to help it implement Salesforce.com, a web-based solution that the Trust wanted to use for administration of grants. The joint Capgemini-client team achieved roll-out in just 11 weeks. However, with a strong focus on organisational outcomes, the team achieved much more: a transformation that enabled the organisation to move its entire grant application online and make payments electronically instead of by cheque and upload key financial information directly from Salesforce into its financial system Sage Accounts. The result is a more streamlined end to end approach to data capture for staff and external fundraisers who are applying for funding. This means that the Trust can devote more time to its charitable projects. The solution also offers a far greater quality of management information to track trends in funding demands across the sector. This last benefit will help drive more strategic decisions at Board level on how the Trust can best fund such a diverse sector. The Trust prides itself on being an approachable and easily accessible funder. The online functionality will build on this and allow the in-house assessment team to spend more time with the applicant on the detail of their application and less on manual data capture.

The Robertson Trust was established in 1961 by Elspeth, Agnes and Ethel Robertson. The sisters held shares in the businesses founded and developed by their grandfather and father, and donated these to the Trust for charitable purposes. The Trust controls Edrington, one of Scotland's largest private companies in the Scotch whisky industry, which owns several well-known brands, including The Famous Grouse, The Macallan, Highland Park and Cutty Sark.

With over £130m awarded since its inception in 1961, the Trust donates to a wide range of charitable entities and activities that take place in Scotland or have a direct impact there. In 2012/13 the Trust committed over £15m to charities throughout Scotland.

### **The need for a new solution**

The Trust contacted Capgemini because it wanted to upgrade its IT systems, making them more user-friendly and productive, and providing a better experience for both staff and applicants for grants. The Trust had decided to replace its existing bespoke grants management Access database system with Salesforce.com, using the special Non-Profit Starter Pack solution.

There were strategic objectives for upgrading at this particular time. The Trust believed that by automating routine tasks it could change the way it worked for the better. In addition to a more streamlined way of working, Salesforce offered a far greater management information reporting capacity. In an environment where fresh funding for the sector is so restricted, the Trust's award-making decisions are more important than ever.

The Trust asked Capgemini to help it make the Salesforce.com solution available to 20+ internal staff. At the same time, it hoped to give external fundraisers applying for grants a better experience by enabling them to submit their applications online. As part of the same exercise, the Trust also wanted to enable faster payments by moving from cheques to BACS.

Starting in January 2014, Capgemini provided end-to-end project management and execution of the implementation process, working closely with the Trust's project manager and user base. This included:

- Validating that Salesforce.com was the right solution for the Trust's needs
- Gathering the business requirements for the new database and the online forms
- Configuring and developing the solution in accordance with the requirements
- Development of online application forms
- Training end-users, including creation of the necessary materials
- Carrying out testing and supporting user acceptance testing
- Implementing the solution following user sign-off

Salesforce.com contributed by providing licences at a concessionary rate since the Trust is a non-profit organisation.

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### **A collaborative approach to organisational change**

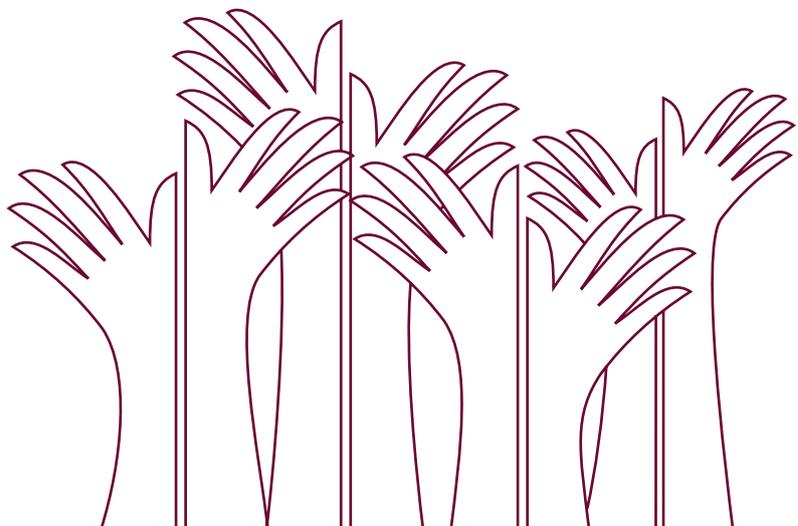
Capgemini’s approach, particularly its focus on delivering organisation outcomes, made this much more than a successful systems implementation. A team of just four Capgemini staff, collaborating closely with the Trust, achieved a significant transformation within a modest project timescale of 11 weeks. One of Capgemini’s team worked onsite, one in London and two in India; Capgemini’s Rightshore® approach ensured a cost-effective and seamless collaboration. The onsite team member worked closely with the Trust to understand the requirements while the sub-team in India carried out the tasks that they defined, such as development of the online application forms.

The solution helped transform the business in two fundamental ways. First, it changed grants management – a fundamental activity of the Trust – from a paper-based application process into a self-service process, performed online. Second, it enabled the business to make grant payments electronically, removing the need to send out cheques.

For the Trust’s staff and external applicants, this has meant adopting new ways of working. Capgemini helped to design and put in place workflows to streamline the processing of grant applications and communications.

The new processes, supported by a fit-for-purpose IT solution, are now ensuring a better staff experience and safeguard the Trust’s reputation for excellence and for having flexible and strong relationships with charities. Several of the current applicants worked with the project team to test the online functionality, which gave invaluable feedback through the UAT phase of the project.

What was previously a manual process of data entry and letter generation has become fully automated. Applicant information now feeds directly into Salesforce via the online application route, and award letters have been replaced by automated email notifications with full details and terms and conditions of awards being made.



## More about the benefits of organisational transformation

Major benefits include a better staff experience as a result of a higher “right first time” rate: online forms will ensure that a higher proportion of applications are received with the correct information, and this reduces the lead time and effort associated with processing the applications.

In addition, the new solution minimises manual data entry and eliminates most paper-based communications.

The Trust’s customers – charities applying for grants – also benefit, since applying online will lead to speedier response times, and electronic payments mean the funds should reach them more quickly and reliably.

The Trust has also gained a greatly improved reporting capability to help it gather key management information. This in turn will allow it to track the demand within certain areas for funding and importantly allow it to adapt its strategic position accordingly.

## Sharing the benefits

The Trust intends to share the lessons learnt, and potentially the solution itself, with other charitable organisations. There are already a number of other trusts exploring a Salesforce solution. By sharing best practice with similar organisations considering Salesforce implementations, the Robertson Trust and Capgemini can multiply the benefits.



### About Capgemini

With almost 140,000 people in over 40 countries, Capgemini is one of the world’s foremost providers of consulting, technology and outsourcing services. The Group reported 2013 global revenues of EUR 10.1 billion.

Together with its clients, Capgemini creates and delivers business and technology solutions that fit their needs and drive the results they want.

A deeply multicultural organisation, Capgemini has developed its own way of working, the Collaborative Business Experience™, and draws on Rightshore®, its worldwide delivery model.

Learn more about us at [www.uk.capgemini.com](http://www.uk.capgemini.com)

In collaboration with



The Robertson Trust is an independent Scottish grant-making Trust. The object of the Trust is the provision of financial support for charities as defined by the Law of Scotland.

More information is available at: [www.therobertsontrust.org.uk](http://www.therobertsontrust.org.uk)

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