Case Study
First Sovereign Trust Limited
Fujitsu helps Trust boost its Community Funding

"The CRM 2011 Grants Manager solution developed by Fujitsu New Zealand has given our business the ability to spend more time on making informed decisions, rather than on administration and data entry."
- *Hal King, Trustee, First Sovereign Trust Limited*

The customer

Country: New Zealand
Industry: Gaming/Community Trust
Founded: 2004
Website: www.firstsovereign.co.nz

The challenge

To improve the overall efficiency of First Sovereign Trust's Financial and Grant Management processes by providing a flexible finance system and moving the organisation from a paper-based applications system to a web interface fully integrated with Microsoft Dynamics CRM 2011.

The solution

Out of the box implementation of Microsoft Dynamics Navision with customer specific enhancements followed up with Fujitsu's application services team build and implementation of Fujitsu Grants Manager. The first application of its kind developed specifically for the Australasian marketplace, the solution is a custom built .NET 4.0 web portal and backend - integrated with Microsoft Dynamics CRM 2011. All installed on a cost efficient combination of hosted and on-premise solutions - incorporating Small Business Server, SQL Server 2008 and Fujitsu hardware.

Results

Navision delivered a flexible financial system backed by capable software support producing timely business financial data. Over time First Sovereign's first-time Grant application error rate is predicted to drop from 80% to single figures. Automated workflows within Microsoft Dynamics CRM 2011 are significantly reducing administration overheads while user friendly CRM reporting is enabling fast, informed decision making - increasing the percentage of funds First Sovereign is able to return to the community.

When First Sovereign Trust found its existing financial system and paper based grants management processes weren't flexible enough to keep pace with anticipated growth, they turned to Fujitsu New Zealand for an end-to-end solution.

First Sovereign Trust is licensed by the Department of Internal Affairs to operate gaming machines in New Zealand. The money raised is in turn distributed back into the community via Grants for authorised purposes. These include coaching clinics for junior sports people, educational advancement and programs aimed at supporting 'at risk' youth.

Operating in a field characterised by close governmental oversight and strict financial controls, First Sovereign's trustees decided that its legacy financial system would not be able to easily grow with the organisation as it added new gaming venues. After reviewing a range of options the Trust decided to engage Fujitsu NZ to install Microsoft Dynamics Navision (NAV).

While the Navision implementation was under way First Sovereign also raised a number of issues with Fujitsu around its manual 'grants management' process, as trustee Hal King explains. "Grants management is highly regulated by the Department of Internal Affairs," he says, "but our applications system was manual. As we grew and the number of grant applications increased, the workload and manpower required to deal with the detail in processing those applications went up significantly."

Despite clear instructions, King estimates around 80% of grant applicants were filling out their applications incorrectly, resulting in a slow turnaround of applications and a ballooning administrative overhead. With legislation requiring that a designated percentage of money raised by the Trust had to be returned to the community, First Sovereign could not simply apply more staff to the problem.

"To maximise the returns to the community we needed to work smarter and use technology," says King.

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At Fujitsu, Application Services General Manager John Gould says that the timing of First Sovereign's request was fortuitous as Fujitsu was already working with an Australian organisation on grant management solutions for two government departments. And although those systems weren't applicable to the Trust's problems, he says the experience gave him confidence Fujitsu could help.

Financial Management to start

As a financial management solution NAV's innate flexibility meant it could be installed at the Trust with few changes - and also enabled Fujitsu to add enhancements to the system specifically designed for First Sovereign. These included:

- **Fujitsu Payment module**: An application developed specifically by Fujitsu to improved Navision's audit-ability – important to the Trust as governmental audits occur frequently in the industry.

  Dimensional Reporting: Venue reporting has been enhanced by adding a single field which, when entered, populates multiple dimensions for use in a variety of financial reports.

- **Dynamic GL Allocation**: Overhead allocation tracking is much improved as NAV's Account Schedule facility now allows GL accounts to be allocated across the Trust's venues on the basis of venue-dependent statistics.

Grants Management first steps

The first step was to establish if any existing technology could be easily applied. Gould says an American grants management application offered some initial cause for optimism, but ultimately had to be discounted due to the very specific infrastructure it required. Nonetheless, he says that evaluation process did get Fujitsu's applications team excited about the possibilities.

"We thought the best way forward was to take what we could from our previous experiences, then review all the grant management requirements across multiple customers and develop a grant management web portal application that could be an out-of-the-box solution for First Sovereign with minimum customisation."

Innovation Delivers

With the Trust on board as a foundation customer, Fujitsu's application services team set about developing a solution. The end result was Fujitsu Grants Manager. Integrating with First Sovereign's Microsoft Dynamics CRM 2011, the new system is fully WC3 and New Zealand e-government compliant and is accessible across currently supported browser and operating systems including PC, MAC and mobile devices - specifically iPhone, iPad and Android. Fujitsu Grants Manager completely addresses the Trust's prior issues:

- **Grant Application Processing**: Moving the application process to an online portal with data validation prior to submission means the Trust's 80% application error rate, over time, will drop to single figures. Staff overheads are also reduced as users only need to enter their registration details once and can update their details via online self-service.

- **Grants Distribution:** Where First Sovereign previously had an issue with certain regions not applying for funds raised in their community, now Microsoft's Bing™ mapping functionality displays grants distribution. With each application linked to a region, mapping & marketing tools within Microsoft Dynamics CRM 2011 enable First Sovereign to easily distribute emails to organisations and individuals in the relevant community - encouraging more applications.

- **Reporting:** User friendly dashboards within Microsoft Dynamics CRM 2011 reporting show First Sovereign who is applying for Grants and where the money is being spent – allowing the organisation to plan strategically. Once applications have been submitted, Trust staff can quickly see the relationships in its business data, and use reporting tools and dashboards within Microsoft Dynamics CRM 2011 to aid their decisions.

- **Workflow Automation:** Microsoft CRM 2011's use of email templates and workflow means the majority of the Trust's grants related correspondence is generated and sent automatically from the system without manual intervention.

An End-To-End Solution

"From their first consultation through to the go live date and beyond, Fujitsu has been a trusted partner. The right combination of technology and people makes everybody's life easier," First Sovereign's King says. "With Fujitsu we always felt they had the right skills and technical resources to do the job."

Underpinning both solutions Fujitsu provisioned all software licenses, provided servers running Microsoft Small Business Server 2008, backup storage, hosting of the web portal and other services including Business Analysis, System Testing and Project Management.

With the system just installed, King says he is expecting "great things" to come from the combined impact of Fujitsu Grants Manager 1.1 and Microsoft Dynamics CRM on his industry. "We can see a lot of future benefits in using CRM 2011," he says, "not only in further developing our grants processes, but also managing our venues and mobile regional managers across the country. CRM also has great potential in developing centralised systems for other gaming organisations in our highly regulated industry - and can help us reduce our very high compliance overhead. "

Technology Platform

- Fujitsu Grants Manager
- Microsoft Dynamics Navision
- Microsoft Dynamics CRM 2011
- Microsoft Small Business Server 2008
- Fujitsu Primergy Server
- Fujitsu Backup Storage Hardware
- Shadow Backup Protect and recovery software solution