

Four Best Practices from Sport England

salesforce

Founded in 1996, Sport England is an arm's-length body of government responsible for growing and developing grassroots sport and getting more people active across England.

When COVID-19 public health protocols limited spectators for professional sport, and thus significantly impacted revenue streams, Sport England stepped in with the Government Sport Survival Package to help, a loans and grants programme that was a first for the agency. So, they also launched a loan book management platform on Salesforce, giving them the tools they need to streamline oversight of the loan programme, maintain real-time visibility and an audit trail of borrower activity and payment schedules, and automate reporting – operationalising the loan book programme, end-to-end.

Rob Hartley (Head of Loan Operations & Contracts) shares four best practices from that work.

1. GET THE RIGHT RESOURCES ON BOARD FROM THE BEGINNING.

"You need to have the right resources to be able to deliver the project properly. Identify them in-house and be clear where you need to seek external help. This was quite important about setting us down the right road," said Hartley.

Sport England needed to move quickly and didn't have time to hire a team of developers or build a bespoke system. Instead, they brought in technology consulting support and sought an out-of-the-box solution that they could configure to match their business needs.

"A dedicated team with the right skill mix combined with the right resources is key to delivery. You don't want to rebuild things over and over," shared Hartley. "Do it once. Do it well."

2. MEET USERS WHERE THEY'RE AT.

As Sport England suddenly found themselves managing a loan book for the next 25 years, with no real experience as loan agents, the team needed to help prepare and educate internal users who were being asked to take on this new scope of work. The team used a mix of text, video, and task-based modules on [Trailhead](#) to onboard users and get them familiar with the new platform quickly.

"People learn in different ways. We were able to automate some of the training and standardise the approach, but the mix of module types meant that we could offer a range of learning based on user roles and give users an opportunity to interact with the site without worrying that they would break something," said Hartley.

The team used a hands-on, practical learning approach to help grow confidence from the beginning so that users could hit the ground running from go-live.

3. TAKE AN AGILE APPROACH.

The Sport England team adopted an agile process methodology to deploy their platform, testing and building iteratively as they went. "This approach allowed us to work our way through different functional blocks and configure things how we wanted them set up. We got the basics right and built on them," explained Hartley. "Flexibility was critical for us. We knew we'd need the ability to pivot as needs arose."

Each stage of the project allowed the project team to review progress and adapt their approach as needed, keeping their focus on development and continuous improvement and, crucially, ensuring that the final product met the business needs of the Sport England team.

This approach can help organisations keep speed to launch while scaling to requirements as they deploy new tools that help them deliver on their mission.

4. LEAN ON SUBJECT MATTER EXPERTISE.

Loans and grants workflows tend to involve intricacies and nuances that can be hard to master overnight. The Sport England team extended their platform capabilities through a custom app for financial intermediaries available on the [Salesforce AppExchange](#) giving the team the tools they need as a social investment lender to manage the specific lifecycle of the loan process including compliance monitoring, maintaining an audit trail, and tracking repayments.

Additionally, to help borrowers manage their repayment journey, the Sport England team is also building a reference library of guidance, videos, and communications that recipients will be able to access in order to stay ahead of payment due dates and other required actions.

By bringing together the right areas of practice and expertise, the team can focus on programme strategy and not administrative tasks. "These are the things that make it easier for the borrower, and it also helps us manage the data that we get from them, too," Hartley said.

