MOVING HOUSE

Migrating Data into ActivityInfo

MISSIOINVEST

Context

MISSIOINVEST

Missio Invest is a **social impact fund** that has been providing patient capital and technical assistance to institutions of the Catholic Church in Africa since 2016.
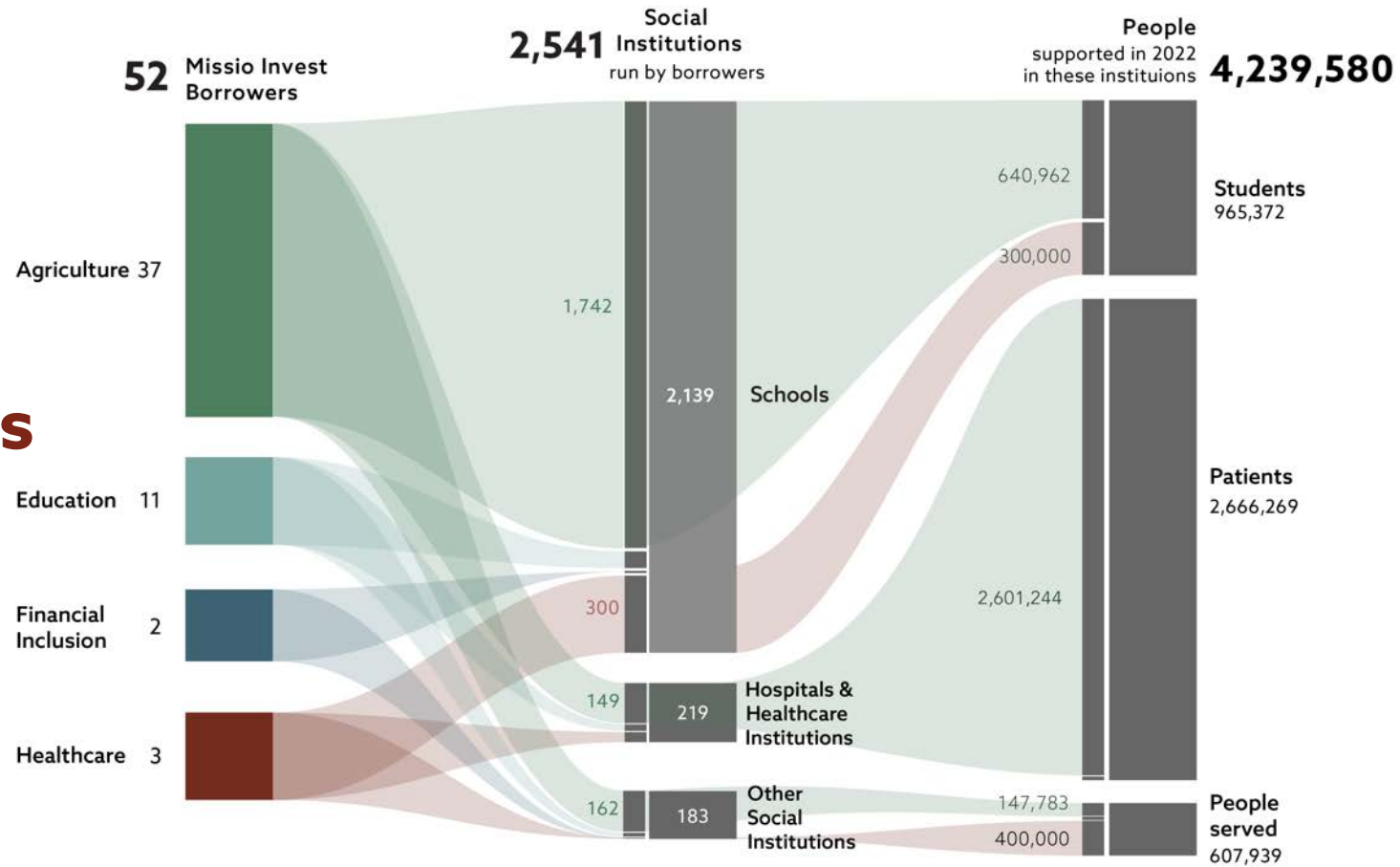
Portfolio of
16 million USD

60 loans
in 10 countries

The multiplication effect of our loans

supporting
4,239,580 people

In 2022
52 borrowers
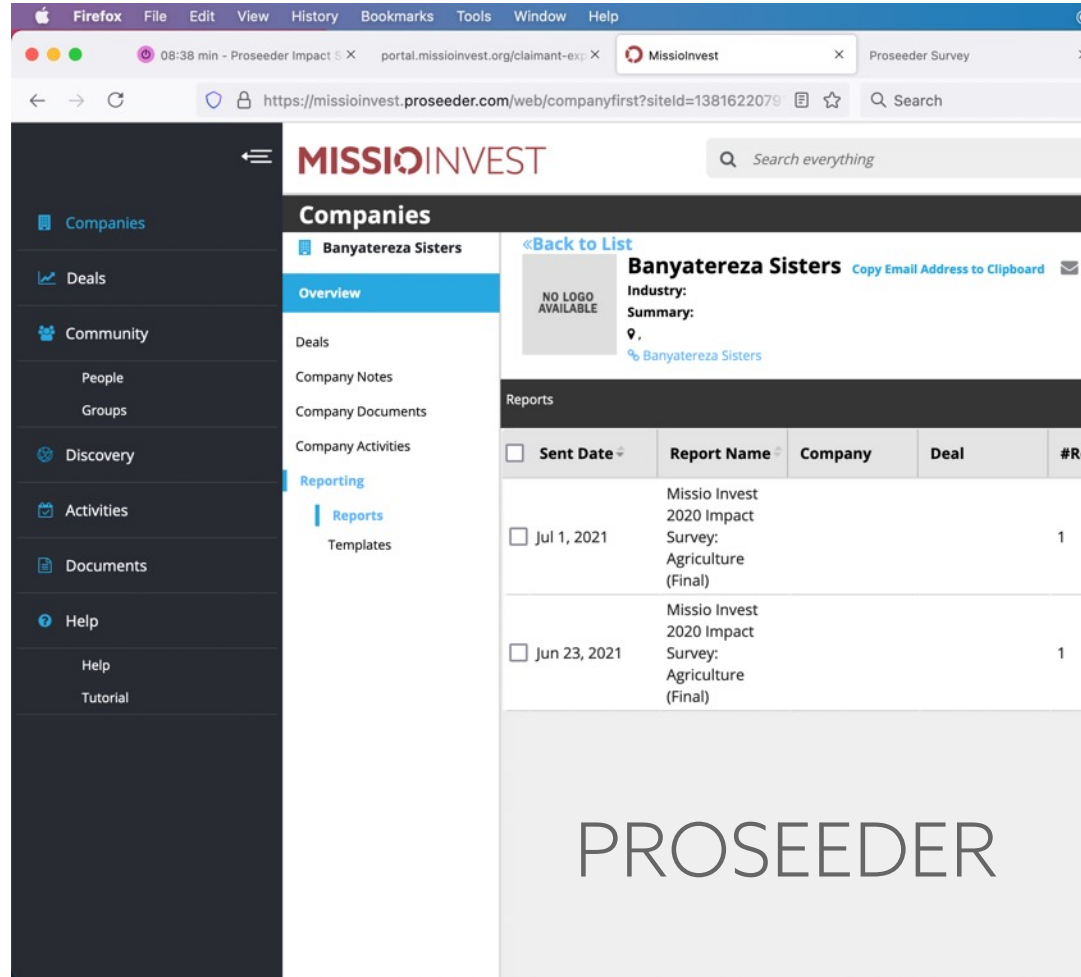
operated
2,541 social institutions

"Redefining Social Impact"

MISSIOINVEST

Previous data management solution

PROSEEDER

For Borrower Pipeline and Impact Data

- Non-existent customer support
- No documentation

Couldn't ~
- Edit data
- Change data model
- Write our own reports

Etc.

MISSIOINVEST

Moving to a new (data) house

MISSIOINVEST

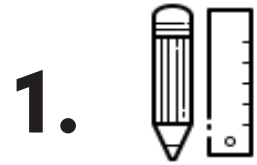SYSTEM

DATA

USERS

SYSTEM

DATA

USERS

Chance for a new beginning

1.

Re-Design with Best Practices
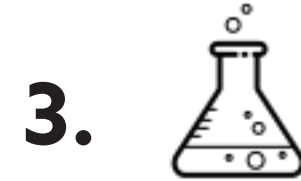
- Normalize
- Consistent & easy naming
- Document

2.

Review the Data Model

- Hierarchy (Forms)
- Primary Keys
- Indicators (Fields) – keep / drop / new
- Reports / Dashboards

3.

Test with Dummy Data

Experiment.

Make sure it all links & works like it should.

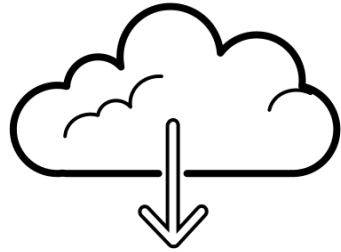**Excellent support by the team at BeDataDriven -** Regular calls, quick turnarounds

SYSTEM

DATA

USERS

Make it tidy

...keep tabs on your process (document!)

1.

"Make piles"

Organize what you have: is it all there?

Backup a version!

2.

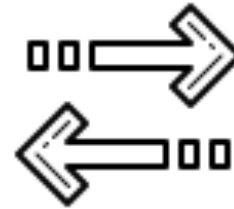### *"Check for holes"*

- Consistency
- Duplication
- Capitalization
- Date formats

3.

"Sort"

Organize columns & names to match your Forms in AI – *in the same order*

4.

"Import"

- Primary keys match
- *no required fields*
- *no validation rules*

Tools	CSV files into Excel	Excel	Excel	Excel into Ai

SYSTEM

DATA

USERS

It's for them, really

1.

User Personas

- How will they work with the data?
- Play through the most regular interactions
- Creates *Roles*

2.

User Training

- General introduction ('webinar') as a group
- Individual user set-up in 1:1 sessions
- ***... let them drive!***

3.

Tip of the Week

"How–To" emails *Specific to your data & use cases*

Ai Working Group - Ownership of decisions throughout, ask the hive mind!

If I had to pick ~

...and document throughout!

SYSTEM

Re-Design with Best Practices

Easy names

DATA

"Make it tidy"

- Make a backup before data cleaning
- No required fields / validation for import

USERS

User Training

... let them drive!

MISSIO INVEST

Thank you.

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