

# MOVING HOUSE

Migrating Data into ActivityInfo



# Context

# MISSION INVEST

*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**

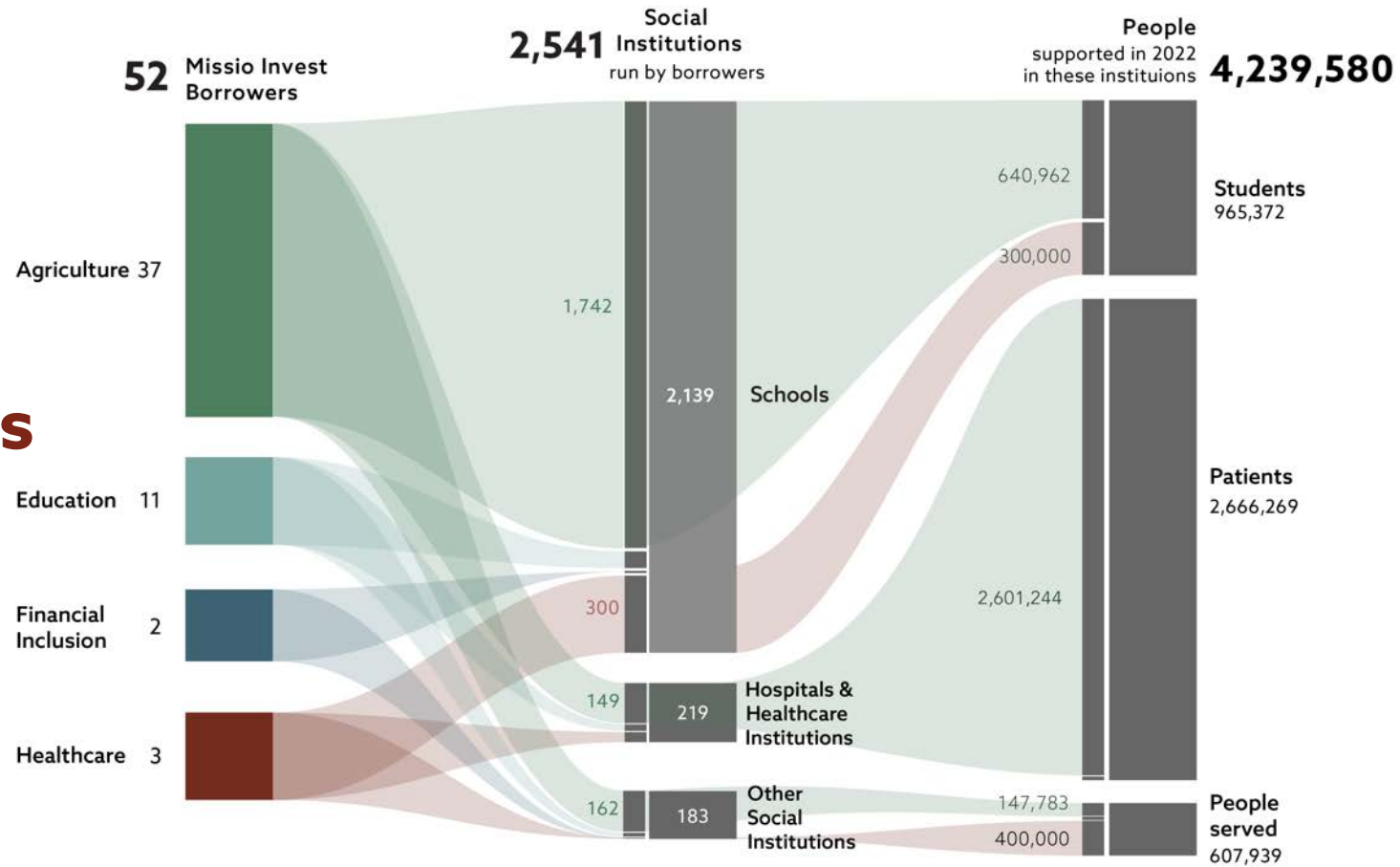
in 10 countries



# The multiplication effect of our loans

In 2022

**52 borrowers**



operated

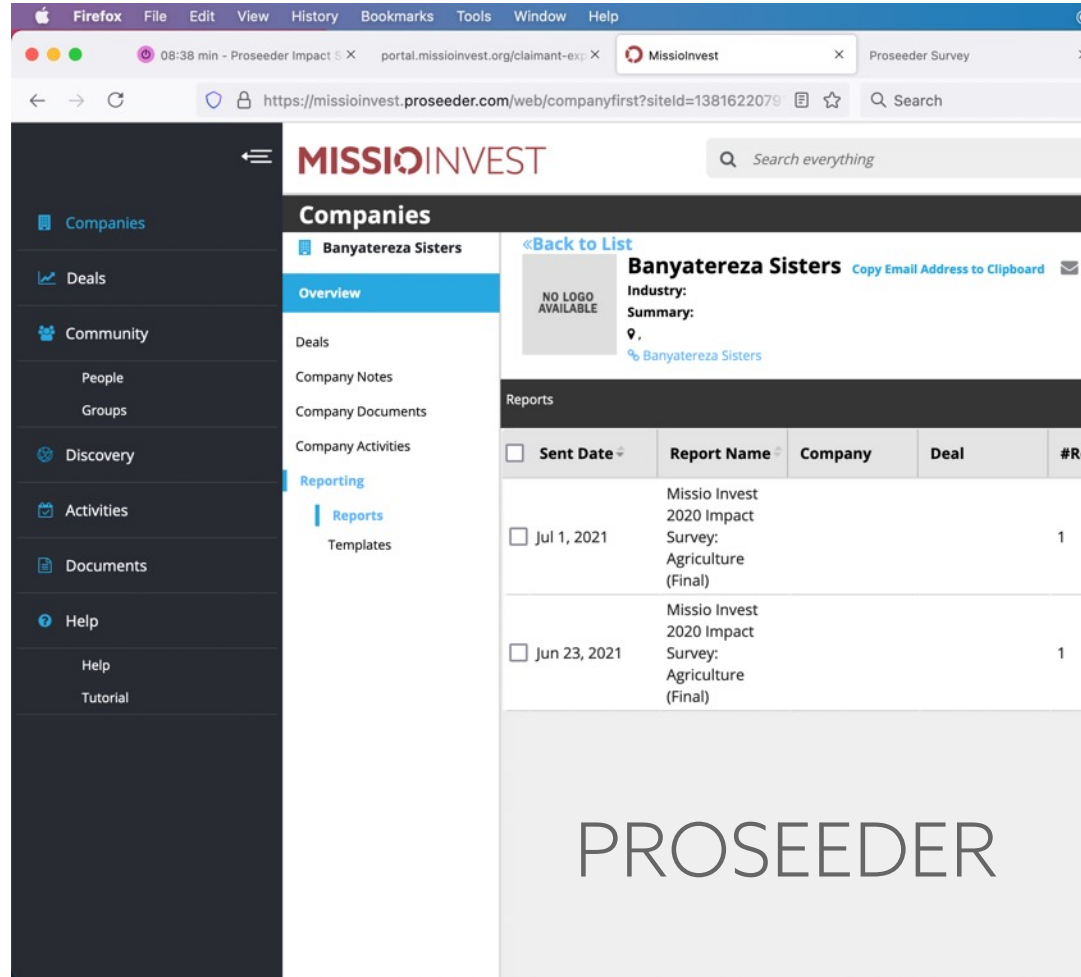
**2,541 social institutions**

supporting  
**4,239,580 people**

*"Redefining Social Impact"*

**MISSION INVEST**

# Previous data management solution



The screenshot shows the MissioInvest web application interface. The browser address bar displays the URL: `https://missioinvest.proseeder.com/web/companyfirst?siteId=1381622079`. The application header includes the MissioInvest logo and a search bar. The left sidebar contains navigation options: Companies, Deals, Community, People, Groups, Discovery, Activities, Documents, and Help. The main content area is titled "Companies" and shows the profile for "Banyatereza Sisters". The profile includes a "NO LOGO AVAILABLE" placeholder, the company name, industry, and summary. Below the profile is a "Reports" section with a table listing reports.

<input type="checkbox"/>	Sent Date	Report Name	Company	Deal	#Re
<input type="checkbox"/>	Jul 1, 2021	Missio Invest 2020 Impact Survey: Agriculture (Final)			1
<input type="checkbox"/>	Jun 23, 2021	Missio Invest 2020 Impact Survey: Agriculture (Final)			1

At the bottom of the screenshot, the word "PROSEEDER" is displayed in large, light gray letters.

## For Borrower Pipeline and Impact Data

- Non-existent customer support
- No documentation

Couldn't ~

- Edit data
  - Change data model
  - Write our own reports
- Etc.

# Moving to a new (data) house





SYSTEM



DATA



USERS



SYSTEM



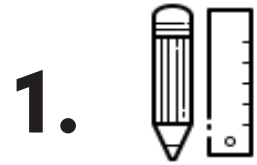
DATA



USERS



# Chance for a new beginning



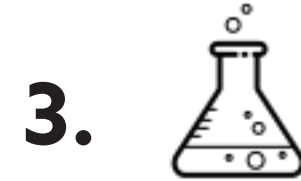
## Re-Design with Best Practices

- Normalize
- Consistent & easy naming
- Document



## Review the Data Model

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



## Test with Dummy Data Experiment.

*Experiment.*

Make sure it all links & works like it should.

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



SYSTEM



DATA

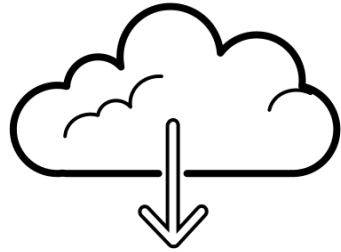


USERS

# Make it tidy

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

1.



***"Make piles"***

Organize what you have: is it all there?

*Backup a version!*

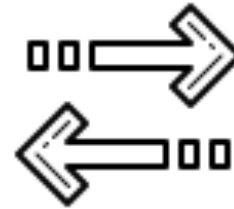
2.



***"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



## ***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!*



**Re-Design with  
Best Practices**

Easy names



***"Make it tidy"***

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



**User Training**

*... let them drive!*

# Thank you.

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