MOVING HOUSE
Migrating Data into ActivityInfo
Context
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

2,541 social institutions

4,239,580 people

“Redefining Social Impact”
Previous data management solution

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
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
Make it tidy

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 |

...keep tabs on your process (document!)
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!
Thank you.
www.missioinvest.org

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