



S.M.S.

Social mission system

Regional Meeting

Kolkata, India

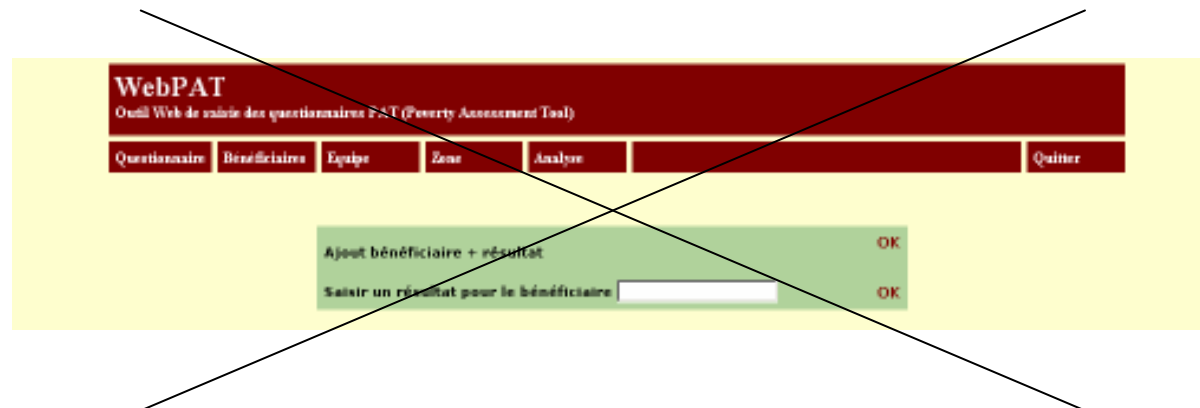
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August 2011

ENTREPRENEURS
du Monde

WHY S.M.S.

- **Propose an off-line tool to encode the PAT tools**
 - To counter difficult access to **internet**
 - To develop better **analysis** functionalities
 - and also to decentralise PAT encoding to **branch level**
 - and to link the PAT database with the Portfolio MIS (**synchronise partner data**)



ONE STEP FURTHER

- **Need for more detailed follow-up of Non-financial services**
 - **Trainings**

When we claim 23 415 attendances in training sessions, what does it mean?

Do we know how many times Ms. XYZ has attended the “Marketing” training?

What kind of data do our trainers and NFS teams have?

How do we compile the data for reporting purposes?

ONE STEP FURTHER

- **Need for more detailed follow-up of Non-financial services**
 - **Trainings**
 - **Individual partner follow-up**

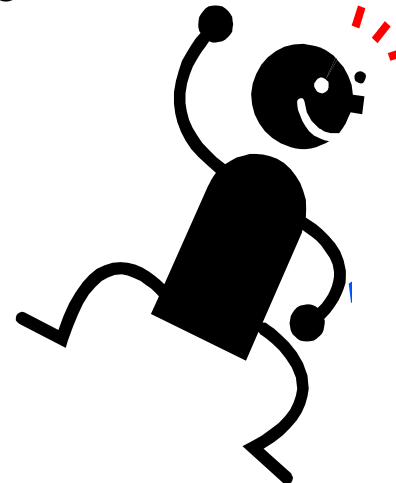
We develop more and more types of counselling, follow-up etc and lack appropriate tools to store and analyse all this information.

Why not cross the data on trainings attended, with the progress made, ...

ONE STEP FURTHER

- **Need for more detailed follow-up of Non-financial services**
 - **Trainings**
 - **Individual partner follow-up**

=> The PAT database already contains detailed list of the partners, so let's go one step further and use it to manage NFS as well



S.M.S. MAIN FEATURES



PARTNERS

- Partner data is imported from the Portfolio MIS
- Assisted data entry

S.M.S. MAIN FEATURES



QUESTIONNAIRES

➤ All PAT data is encoded as per WebPAT

☺ Possibility to create other questionnaires for other purposes

-Exit survey

-Satisfaction survey

- ...

S.M.S. MAIN FEATURES



ANALYSIS

➤ Automatic analysis of PAT data (*or any other questionnaire in SMS*)

☺ Graphs can be customised, copy/pasted to reports, cross analysed

☺ Data can be exported to Excel or PDF

S.M.S. MAIN FEATURES



TRAININGS

- Plan training sessions
- Track training session attendances
- Analyse the « outreach » of the trainings (i.e. different people attending)
- Know which training sessions each partner has attended

S.M.S. MAIN FEATURES



INDIVIDUAL FOLLOW-UP

- Track individual counselling services
 - ✓ Define the type of visits
 - ✓ Track the progress
 - ✓ Plan the future visits
 - ✓ Keep track of referrals

S.M.S. DEPLOYMENT

- **Development** should be finalised in the next weeks
- **Deployment** will involve:
 - Defining the required specifications
 - Design the **PAT** questionnaire
 - List the types of **training** topics
 - List the names of the **training** modules
 - Define the types of **individual visits** (counselling, follow-up, ...)
 - And all the related criteria

S.M.S. DEPLOYMENT

- **Development** should be finalised in the next weeks
- **Deployment** will involve:
 - Defining the required specifications
 - Define how SMS will fit in your current processes
 - Who does the encoding, where and at what stage of the process
 - How are the reports used, by whom and at what stage



S.M.S. DEPLOYMENT

- **Development** should be finalised in the next weeks
- **Deployment** will involve:
 - Defining the required specifications
 - Define how SMS will fit in your current processes
 - Retrieve historical data
 - WebPAT if applicable
 - Past data on training sessions (since when?)
 - Past data on follow-up visits to partners (since when?)



S.M.S. DEPLOYMENT

- **Development** should be finalised in the next weeks
- **Deployment** will involve:
 - Defining the required specifications
 - Define how SMS will fit in your current processes
 - Retrieve historical data
 - Test synchronisation with portfolio MIS



NOW LET'S GO FOR A DEMONSTRATION...

