

# Maximize Social Impact

HOW TO MAXIMIZE SOCIAL IMPACT OF YOUR PORTFOLIO OR  
PROGRAMS IN A SHORT TIME?

# IMPACT MEASUREMENT AND MANAGEMENT (IMM) TRENDS

Impact Measurement and Management is an approach to build impact evidence of programs or products that benefit people and the planet.



Strong growth in Impact Investment &  
Impact Measurement and  
Management<sup>1</sup>



COVID-19 has pressured business<sup>2</sup>,  
impact investors and philanthropy to  
rethink sustainability and impact



Impact accounting is moving from  
nice to have to must have<sup>3</sup>

References -

1. [Sizing The Impact Investing Market](#)

2. [The Impact Investing Market in the COVID Context](#)

3. [Impact Investing Hot-Right-Now](#)

# PROBLEM WITH IMM TODAY

Impact Measurement and Management is an approach to build impact evidence of programs or products that benefit people and the planet. Historically it has been managed by impact practitioners who often use backward-looking, time-consuming, and resource-intensive processes.



Decision-making is challenging due to a lack of understanding of the actual social impact, resulting in a waste of resources and effort.



Inconsistent or non-existent impact evidence and reporting reduces trust and impact capital growth



Organizations cannot achieve their greatest impact and funders do not get their Social Return on Investment.



We will keep the status quo and miss the opportunity to bring about social change

# THE SOLUTION - IMPACT CLOUD<sup>®</sup>



**Faster and more consistent data collection** providing deep data insights for informed decisions and better resource allocation



**Data collected directly from the people experiencing change** increases traceability and trust from funders



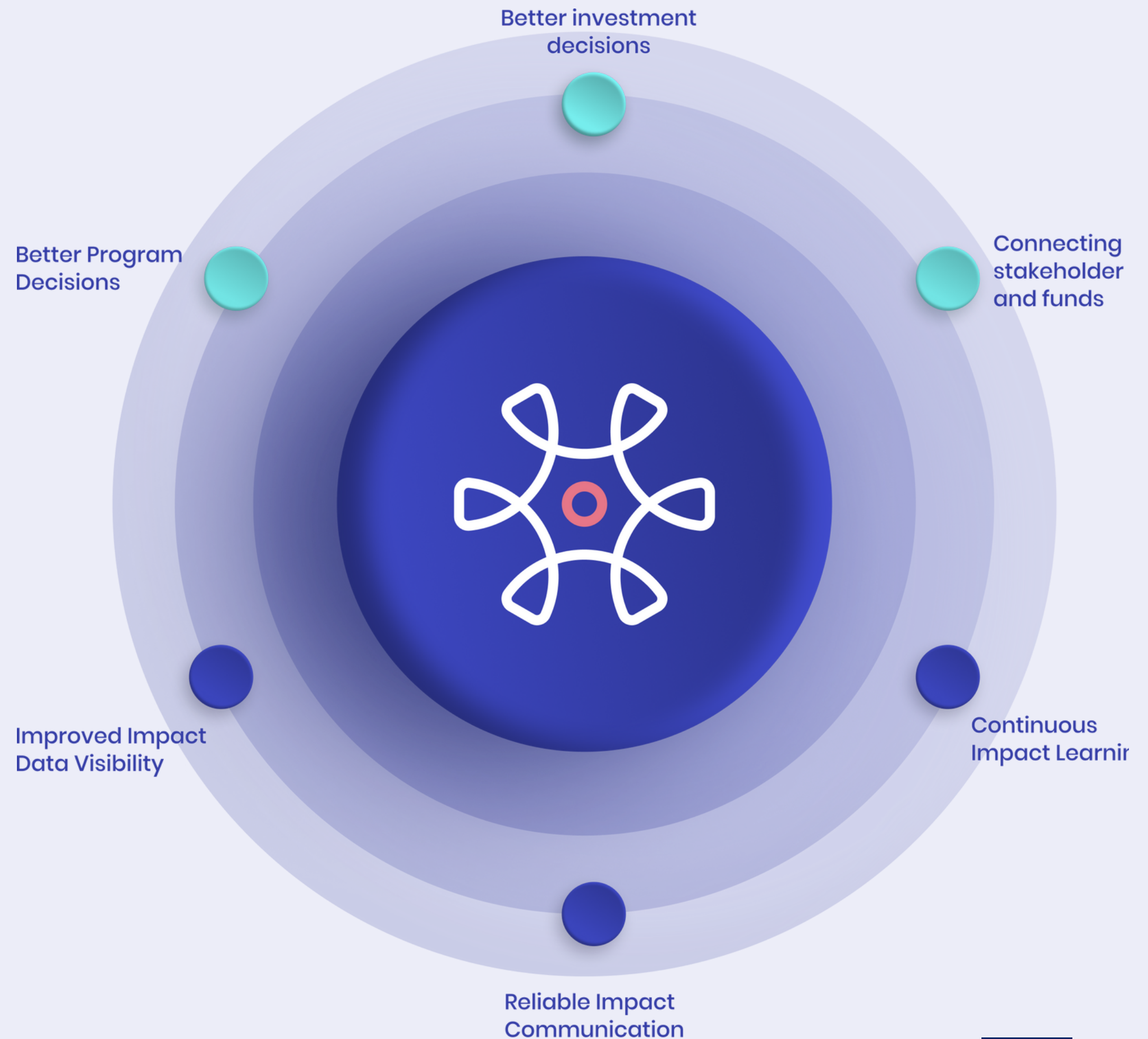
**The advisory to design the right measurement strategy + the technology** to leverage multiple data sources to surface the true impact



**Organizations can reliably demonstrate impact all the time**, attracting more funding and scaling change as a result

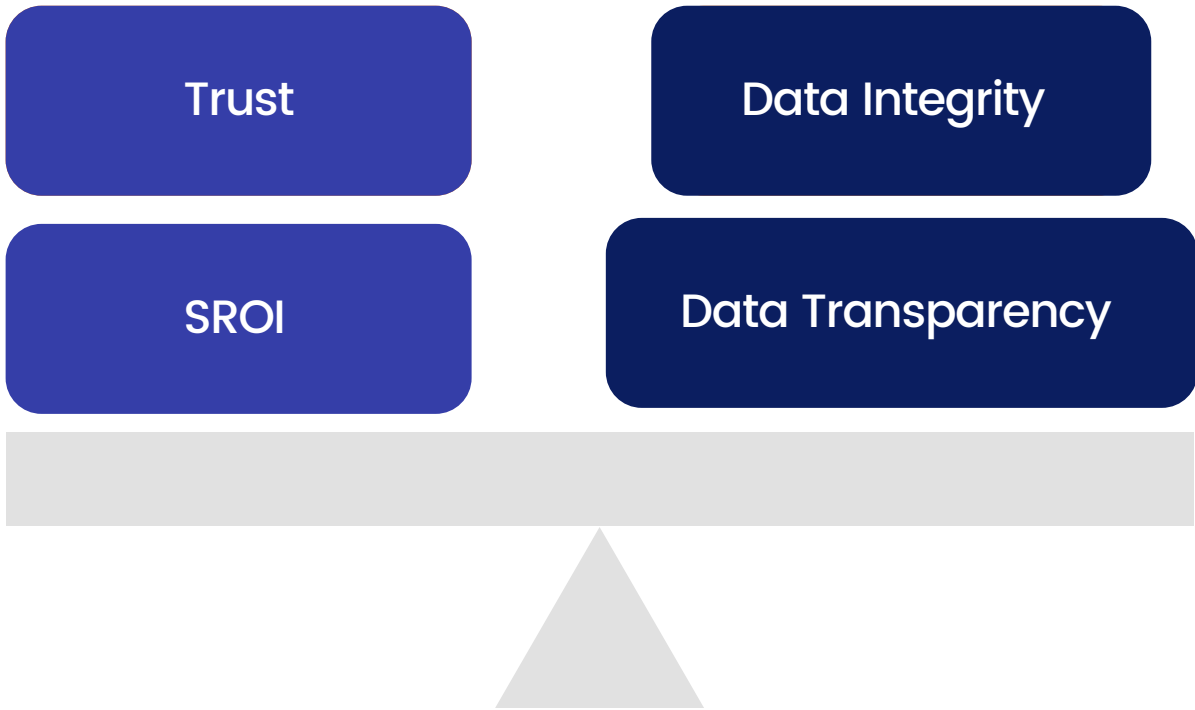


Sopact is a market leader in Impact Measurement and Management. Corporates, impact investors, and philanthropy can maximize social impact return on investment and reduce 5-7 times resources with our solution.











# Current funders challenges

# Sopact's Solution



# A new way to look into Social Return on Investment

OLD WAY	NEW WAY	SOCIAL RETURN ON INVESTMENT WITH CONTINUOUS DATA
		iterative and continuous
		qualitative assessment
		ratio of benefits to costs
		monetization



# Accelerating Social Impact by building IMM capacity in Miller Center and their portfolio of Social Enterprises

## with Knowledge + Technology



### Impact Advisory with Sopact's Experienced Team:

- IMM support to Miller Center to manage their own aggregated portfolio impact and the additionality of their Entrepreneurship program.
- Advisory for all the social enterprises (one cohort at a time) to build their Impact and data collection strategy.
- Advisory for all SEs and Miller Center to design stakeholder surveys.
- Advisory for all SEs and Miller Center on how and what to demonstrate on the dashboard for continuous impact learning to make informed decisions.

### Impact Verification with Impact Cloud®:

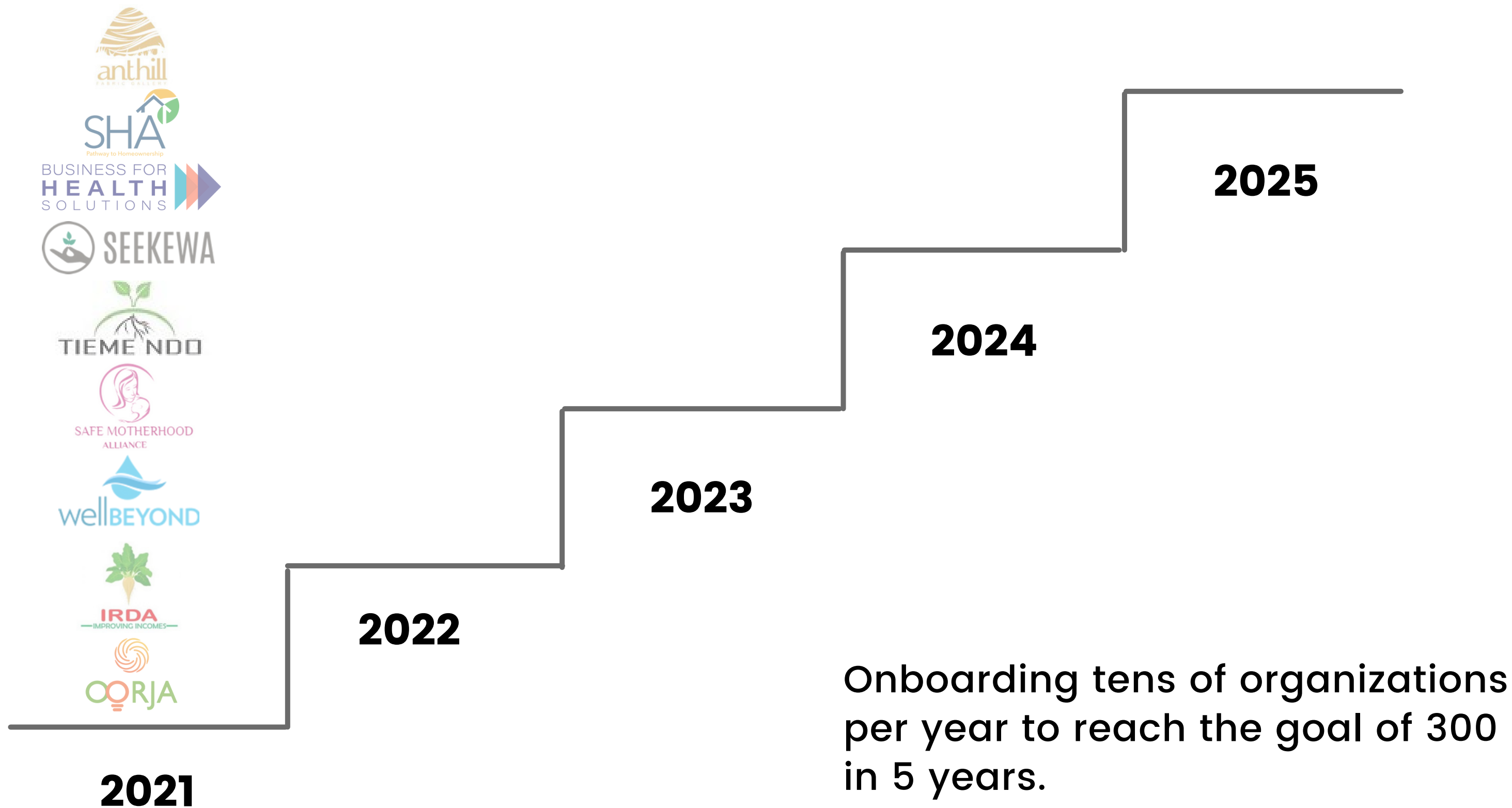
- Miller center manages its portfolio on Sopact's signature platform Impact Cloud®
- All the Social Enterprises also have access to the Impact Cloud® sponsored by Miller Center to manage their impact data on the platform.
- Having a connected system will take the burden off the social enterprises of reporting data to Miller Center.
- Miller Center will have an impactful portfolio available for funding for future impact investing programs.
- Miller Center and SEs will have all their impact intelligence on demand and continuously.



Miller Center is accelerating social entrepreneurship to end global poverty and protect the planet. It accompanies social entrepreneurs on their journeys to impact — creating innovative and sustainable solutions to some of the world's most pressing challenges.



# Building Impact Management Capacity of 300+ Social Enterprises Over 5 Years



# Streamlining the Measurement & Evaluation process for Fairtrade International across multiple countries

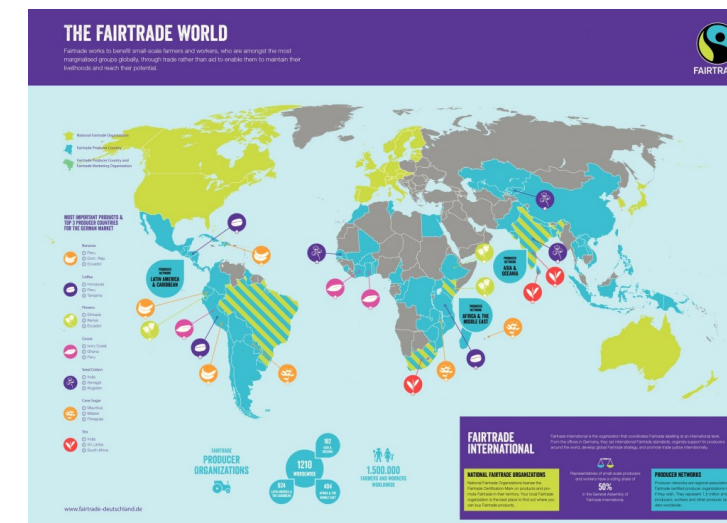
## with Knowledge + Technology

### Impact verification with Impact Cloud®:

- Fair Trade manages the impact of multiple programs, projects, and countries on Sopact's signature platform Impact Cloud®
- All the countries collect data from their respective stakeholders in alignment with Fairtrade's global goals and targets using our platform.
- Having a connected system allows for more effective communication across multiple countries, as well as higher availability of aggregated results for external reporting.
- Each country can make its individual processes more efficient by harnessing technology to perform tasks that would otherwise be done manually on Excel.
- Each country can plug its tools to collect data according to its capacity, access to the internet, tech-savviness, etc.
- Each country can decide what data to share with the rest of Fairtrade International and what data to keep confidential and accessible to their team only.

### Impact and Technical Training with Sopact's LMS:

- Our Learning Management System provides information about impact measurement concepts, best practices, and practical exercises on the platform, which allows to build capacity within each country and reduce the global team's burden on training and engagement.



FairTrade is a global organization that is co-owned by more than 1.8 million farmers and workers who earn fairer prices, build stronger communities, and have control over their futures.



# Geographically dispersed organizations and languages brought onboard in 3 years

## THE FAIRTRADE WORLD

Fairtrade works to benefit small-scale farmers and workers, who are amongst the most marginalised groups globally, through trade rather than aid to enable them to maintain their livelihoods and reach their potential.



### MOST IMPORTANT PRODUCTS & TOP 3 PRODUCER COUNTRIES FOR THE GERMAN MARKET

- Bananas**
  - Peru
  - Dom. Rep.
  - Ecuador
- Coffee**
  - Honduras
  - Peru
  - Tanzania
- Flowers**
  - Ethiopia
  - Kenya
  - Ecuador
- Cocoa**
  - Ivory Coast
  - Ghana
  - Peru
- Seed Cotton**
  - India
  - Senegal
  - Kirgistan
- Cane Sugar**
  - Mauritius
  - Malawi
  - Paraguay
- Tea**
  - India
  - Sri Lanka
  - South Africa

FAIRTRADE  
PRODUCER  
ORGANIZATIONS

1210  
WORLDWIDE

1.500.000  
FARMERS AND WORKERS  
WORLDWIDE

### FAIRTRADE INTERNATIONAL

Fairtrade International is the organization that coordinates Fairtrade labeling at an international level. From the offices in Germany, they set international Fairtrade standards, organize support for producers around the world, develop global Fairtrade strategy, and promote trade justice internationally.

**NATIONAL FAIRTRADE ORGANIZATIONS**  
National Fairtrade Organizations license the Fairtrade Certification Mark on products and promote Fairtrade in their territory. Your local Fairtrade organization is the best place to find out where you can buy Fairtrade products.

Representatives of small-scale producers and workers have a voting share of **50%** in the General Assembly of Fairtrade International.

**PRODUCER NETWORKS**  
Producer networks are regional associations that Fairtrade certified producer organizations may join if they wish. They represent 1.5 million small-scale producers, workers and other producer stakeholders worldwide.



ABALOB I contributes towards thriving, equitable, and sustainable small-scale fishing communities globally through the joint development of Technology For Good.

# Creating Sustainable Social Change with Impact Experiments

## with Knowledge + Technology

- ABALOB I produces knowledge, stewardship of marine resources, and resilience-building in the face of climate change.
- Helps fishers empower themselves to connect directly with restaurants and consumers for the sale of their artisanal products.
- Promotes traceable and transparent seafood at an equitable price and enables fishers to make better harvesting choices.
- Traceable and transparent seafood at an equitable price.
- Disrupts unequal power relations and transforms the value chain for women fishers

What social impact evidence ABALOB I must have?

- **How are we improving food securities for the fisher community?**
- How is Abalobi improving fishers' income and financial security?
- What is their impact on the marginalization of women fishers?
- Is sustainability of the fishery and its associated supply chains improving?
- Change in traceability and transparency of seafood at an equitable price.
- Are fishers able to make better harvesting decisions?



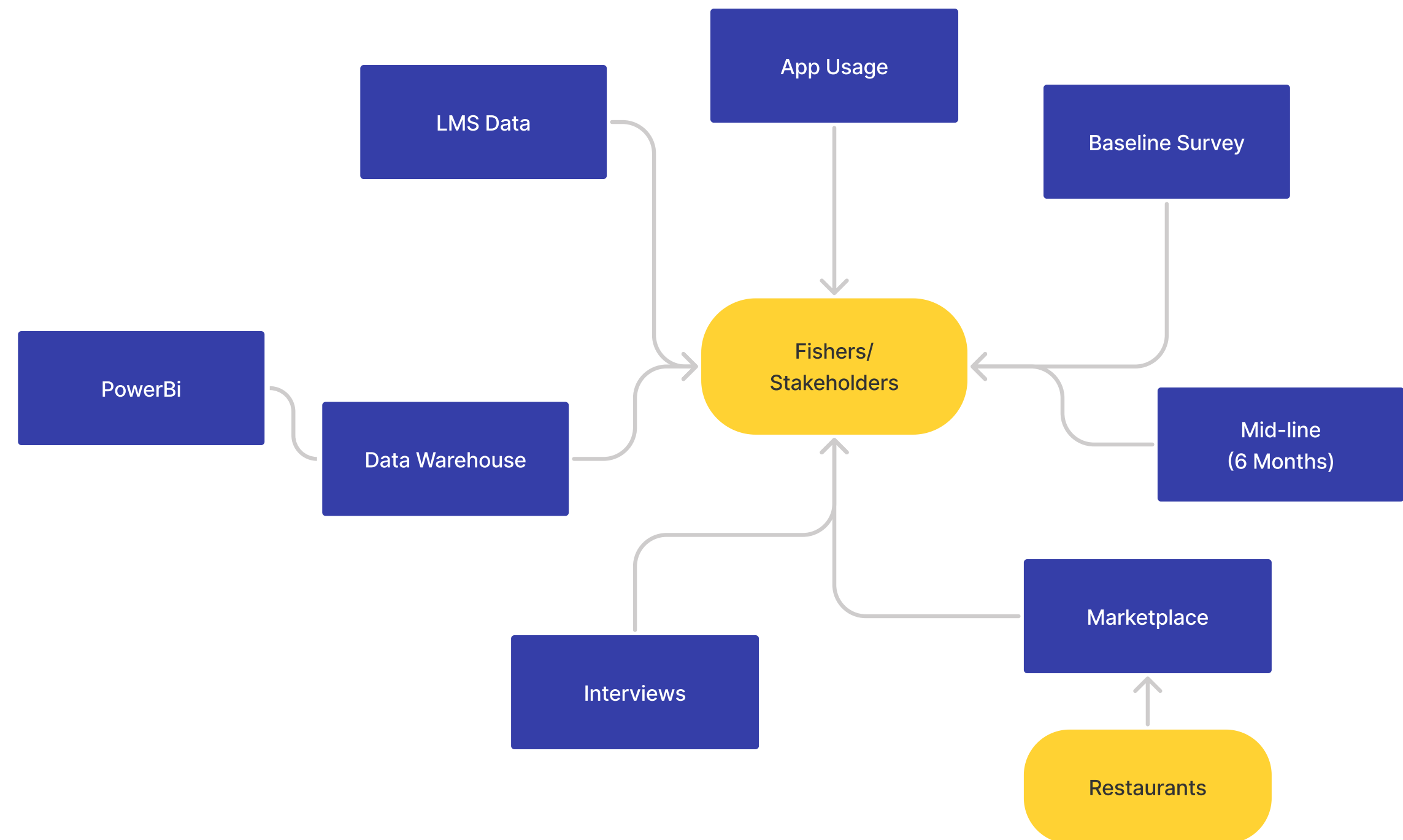
# Transforming lives of fisher communities with Impact Experiments



Data integration with Sopact's Impact Cloud®

Outcomes -

1. Food Security
2. Women Empowerment
3. Quality of life of fishers
4. Sustainable Fishing





## Optimizing Large Portfolio

"Sopact is helping us not only aligning to UN SDG goals but also streamlining our current scorecard connecting targets to the goals."

- Astrid Cortes  
Impact Officer



## Food For The Poor

Food For The Poor" works to uplift poor children, families, and communities in need by providing essentials and long-term development opportunities



# CASE STUDY



## Food For The Poor

Food For The Poor" works to uplift poor children, families, and communities in need by providing essentials and long-term development opportunities

### PROBLEM STATEMENT

## Optimizing Large Portfolio

### RESULT

"Sopact is helping us not only aligning to UN SDG goals but also streamlining our current scorecard connecting targets to the goals."

### BEFORE

- Data collection by hand
- Intense data cleaning, scoring, all in Excel
- Data collected in different language made it difficult to learn without manual translation
- Limited insight due to long learning cycle
- No automatic global alignment
- Long reporting cycle

### AFTER

- Efficient data collection by connected Survey CTO
- Data cleaning made efficient
- Scoring and aggregation is automatic – All the data will be collected, translated, and aggregated automatically.
- Deep Insight
- Continuous learning
- Speaking global language with SDG alignment





## Inclusive and Creative Economy

- "Sopact is helping us demonstrate how investing in early-stage, risk capital can positively impact a regional economy."

Bryce Butler,  
Founder



### Access Ventures

Is building a thriving economy, the one that is equitable, dynamic, and resilient.





# CASE STUDY



## Investment Approach

The investment approach begins with a process of reviewing a company's mission alignment with our organization.. After determining a fit, we then move to a financial review of the opportunity.

### PROBLEM STATEMENT

## Scaling Local Economy

### BEFORE

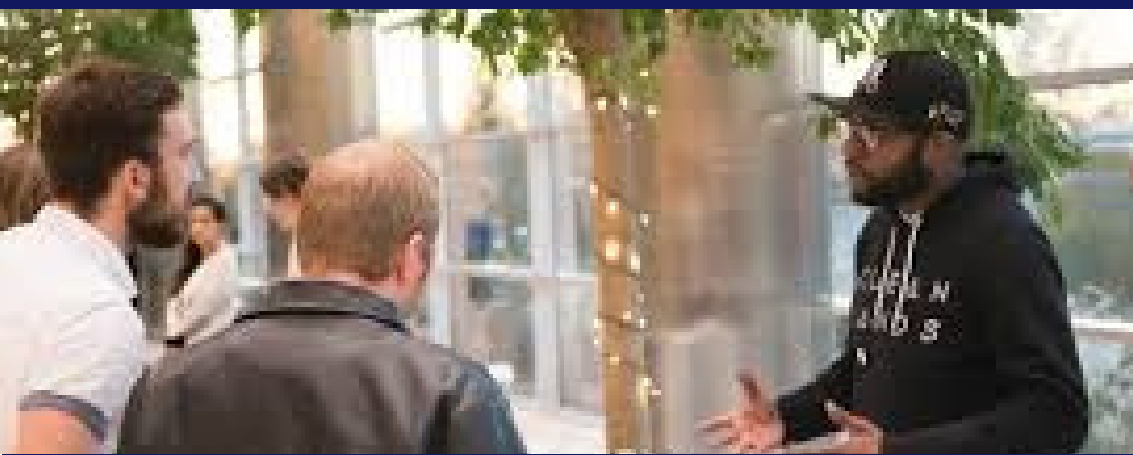
- Data collection by hand
- Lack of data insight for investment decisions
- Limited insight due to long learning cycle
- Lack of Impact verification with Outcome data
- Long reporting cycle

### AFTER

- Moved from Output to Outcome with stakeholder data
- Impact verification
- Clear understanding of impact
- Ability to maximize place based impact
- Thriving community with successful entrepreneurship in Louville

### RESULT

"Sopact is helping us demonstrate how investing in early-stage, risk capital can positively impact a regional economy."



## Aligned with Global Standards



## Awards and Partnerships



## Leading Journals



**Sopact is  
recognized  
thought  
leader  
working to  
improve  
trust and  
SROI of  
ecosystem**

Sopact is recognized as a trusted partner by the industry standards and main news websites

# Trusted platform for social impact verification for 100s of enterprises.

## COLLECTIVE IMPACT



## CAPACITY BUILDERS



## IMPACT MAKERS





# Global Team

Sunrise to Sunset Support Around Globe

15+ And Growing Fast

Our main driver is to find a REAL solution for the impact management challenges using:

- Human-Centered Design
- Empathy
- Creativity
- Innovation
- Technology
- Domain expertise

Expert team in impact measurement and management located in different time zones (US, Europe and India) and specialized in different languages (English, Spanish, Portuguese and Hindi)



**UNMESH  
SHETH**



**MADHUKAR  
PRABHAKARA**



**LORENA  
RODRIGUEZ**



**RICARDO  
PINHO**



**HETAL  
SHETH**



**FARHAN  
KHAN**



**VAISHNAVI  
SUNDARESAN**



**SHIJI  
ABRAHAM**



# How?

We have developed a framework and we work with you and your programs.

## → **Deep Impact Capacity Model**

Sopact has built a deep impact capacity model that allows impact managers to build step by step impact journey for their investments or programs.

## → **Collaborative Improvement**

We work collaboratively to improve the outcome of each program or investment, and allows impact investors to make better decisions on which programs or investments are likely to have a better social return on investment.



# We believe Impact Intentions needs **Knowledge + Technology**



## Online Learning Management

Allows building enterprise capacity based on personalized and actionable playbooks

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## Impact Management Toolkit

Promotes team collaboration for non-tech savvy users



## Impact Cloud®

Our flagship impact measurement and management platform helps streamline the impact management lifecycle.

Design impact strategy, comprehensive portfolio and data management, aggregation, and real-time dashboard promotes better impact management decisions

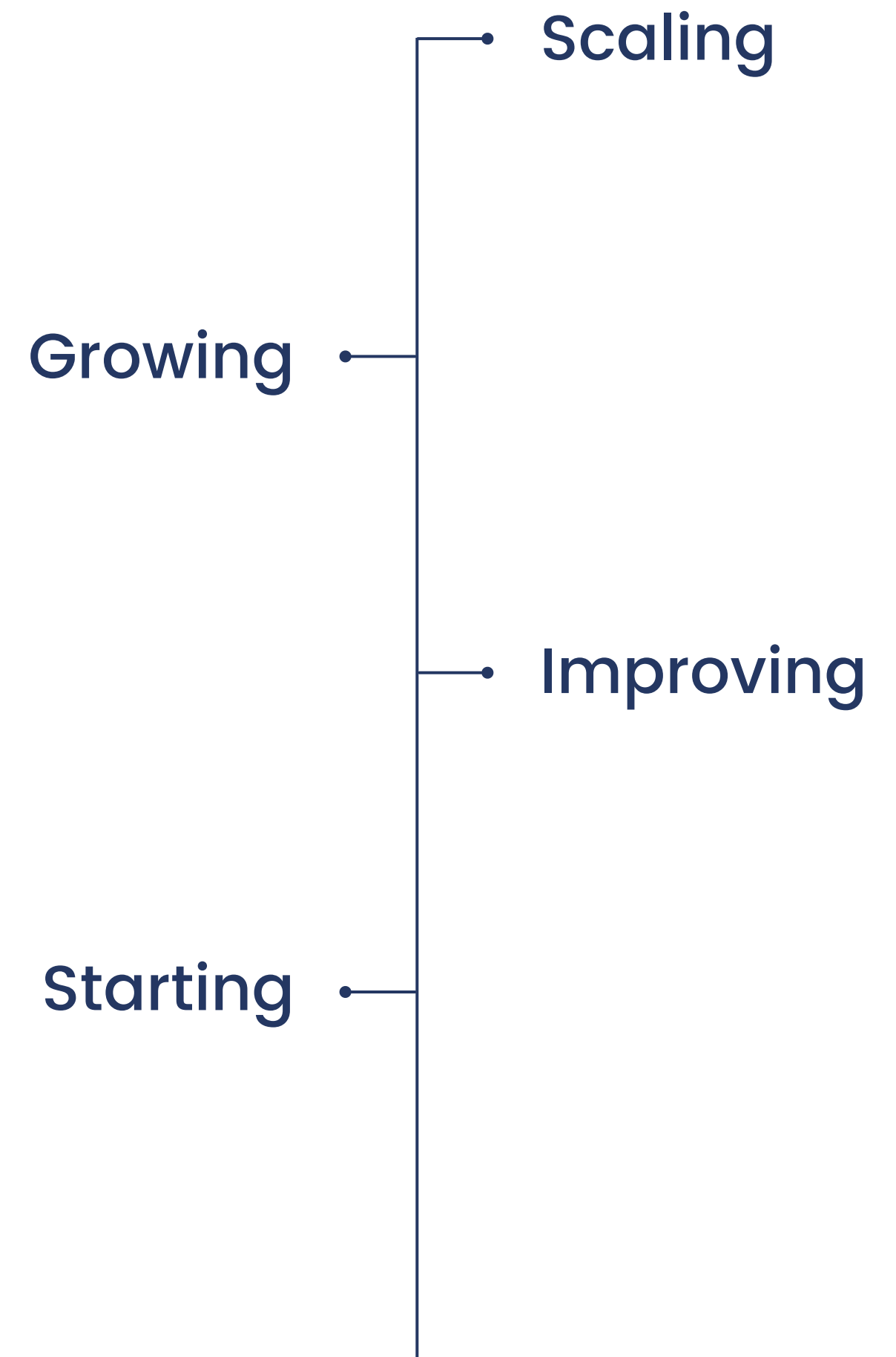
# Funder

Impact Management  
Journey Map



## Funder Impact Management Journey Provides Guidelines for

- Asset Managers,
- Impact Accelerators, and
- Program organizations with many programs on how they can maximize the social impact of their investment or program portfolio



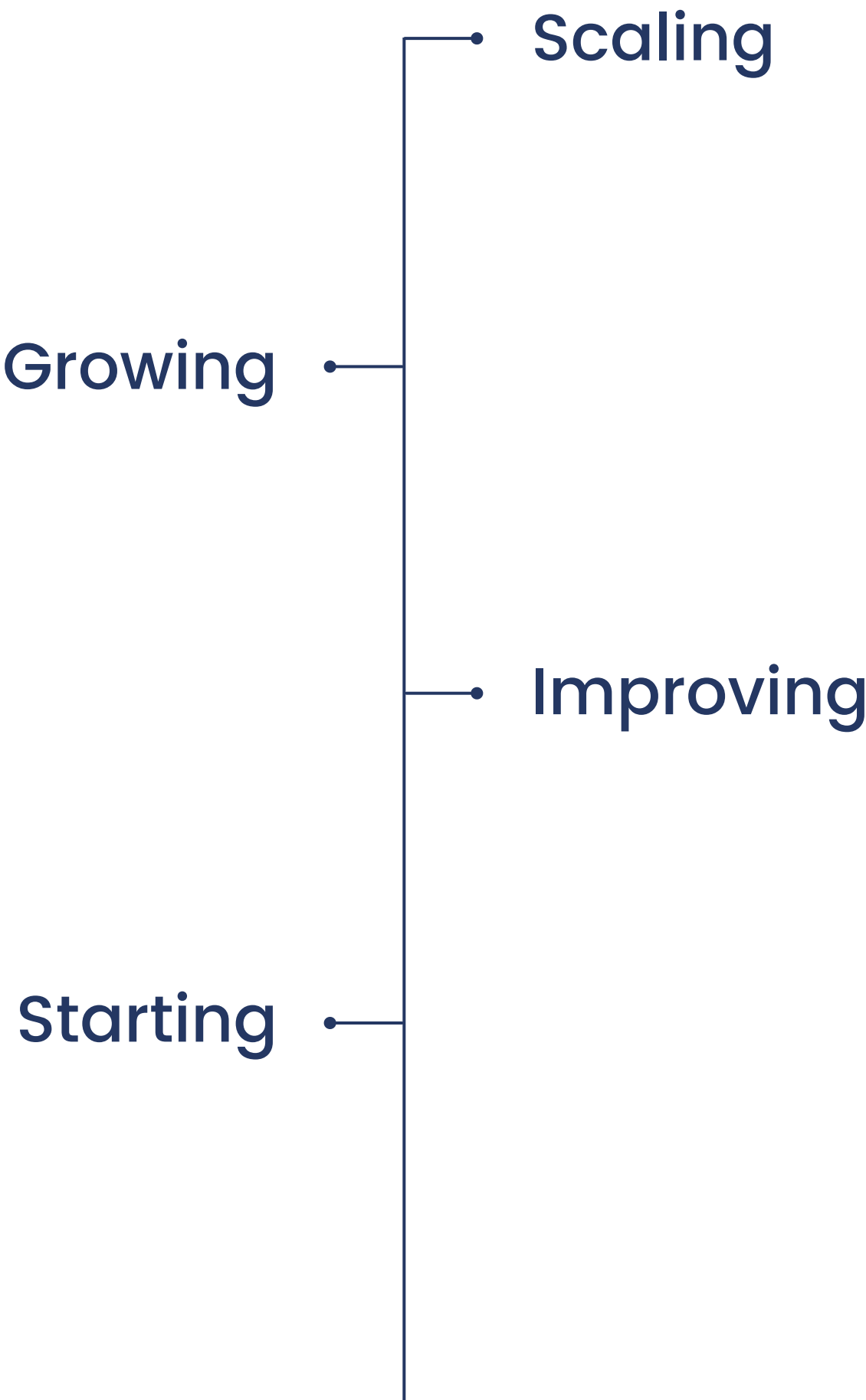
Funder <div>Impact Management Journey Map</div>	Starting <div>IMM 1</div>	Improving <div>IMM 2</div>	Growing <div>IMM 3</div>	Scaling <div>IMM 4</div>
Impact Metrics	Selective Output	Mostly Output	Selecting Core Outcomes	Continuous Outcomes
Data	Governance and/or activity data	Governance, Social and environmental	Governance, Social and environmental	Governance, Social and Environmental Standardize Data Aggregation of Portfolio Companies
Impact Management Capacity	No	Aggregating Portfolio Results	Measuring Portfolio Impact Management Maturity	Continuous improvement TOC And IMP  Building IMM capacity in the portfolio
Portfolio Company Stakeholder	No	No	Baseline Data	Continuous data and Impact Verification
	SDG= Sustainable Development Goals, TOC = Theory of Change, IMP = Impact Management Project, IMM = Impact Measurement and Management			

# Enterprise

Impact Management  
Journey Map

Enterprise Impact Management Journey  
Provides Guidelines for

- Assets such as enterprise,
- Social businesses,
- Nonprofits who work close to stakeholder to maximize the social impact of their program or investments

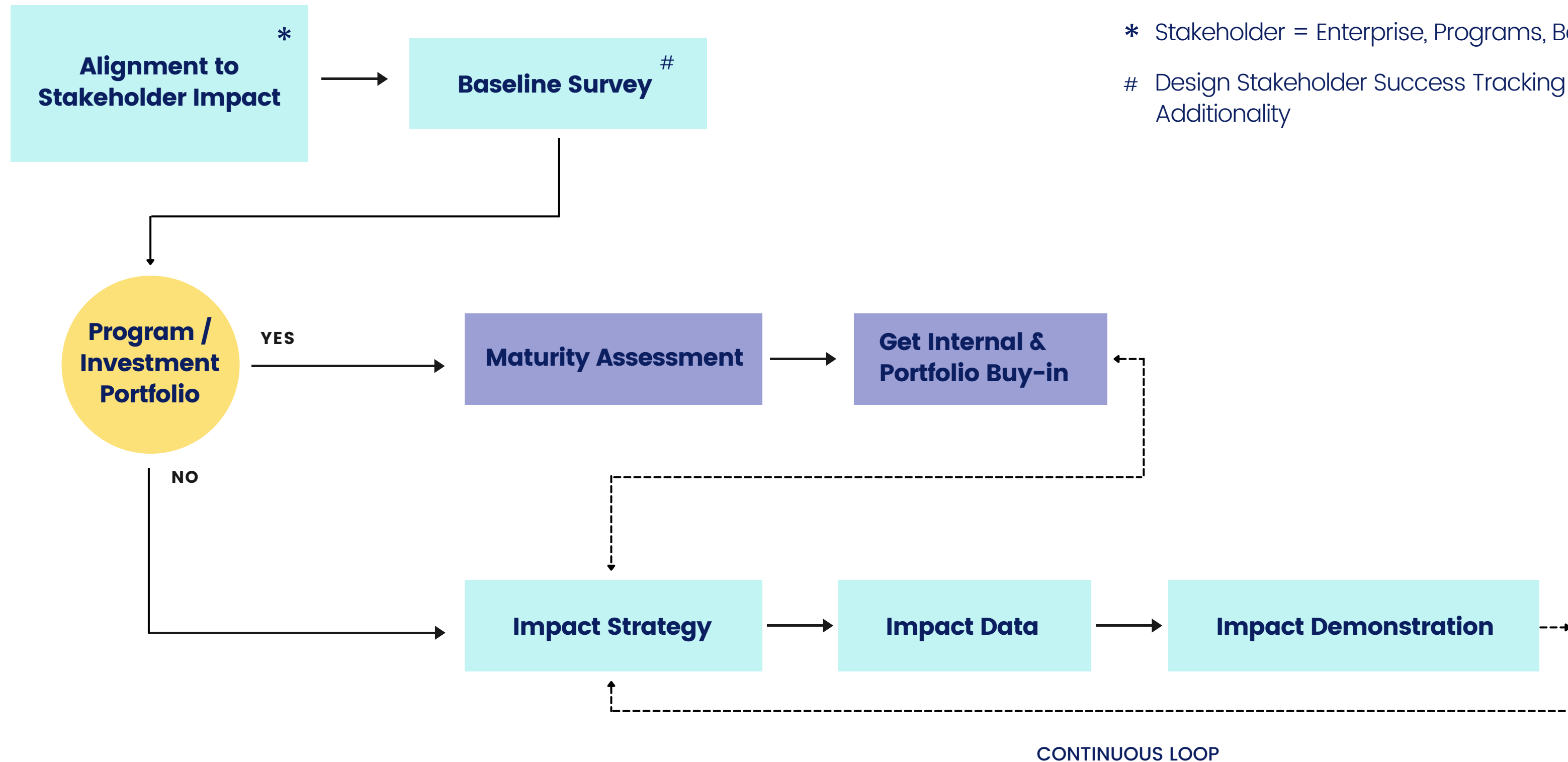


Enterprise Impact Management Journey Map	Starting IMM 1	Improving IMM 2	Growing IMM 3	Scaling IMM 4
Impact Metrics	No	Yes	Matured Outcomes	Optimizing Outcomes
Theory of Change	None	Output Oriented	Outcome Oriented	feed-back loops based on learnings
Stakeholder Feedback	No	Based on research	Based on Survey	Aligned to IMP Dimensions
Impact Learning	No	Data Summary	Outcomes Dashboard	Aligned to IMP Dimensions
	SDG= Sustainable Development Goals, TOC = Theory of Change, IMP = Impact Management Project, IMM = Impact Measurement and Management			

# How it works?

\* Stakeholder = Enterprise, Programs, Beneficiary

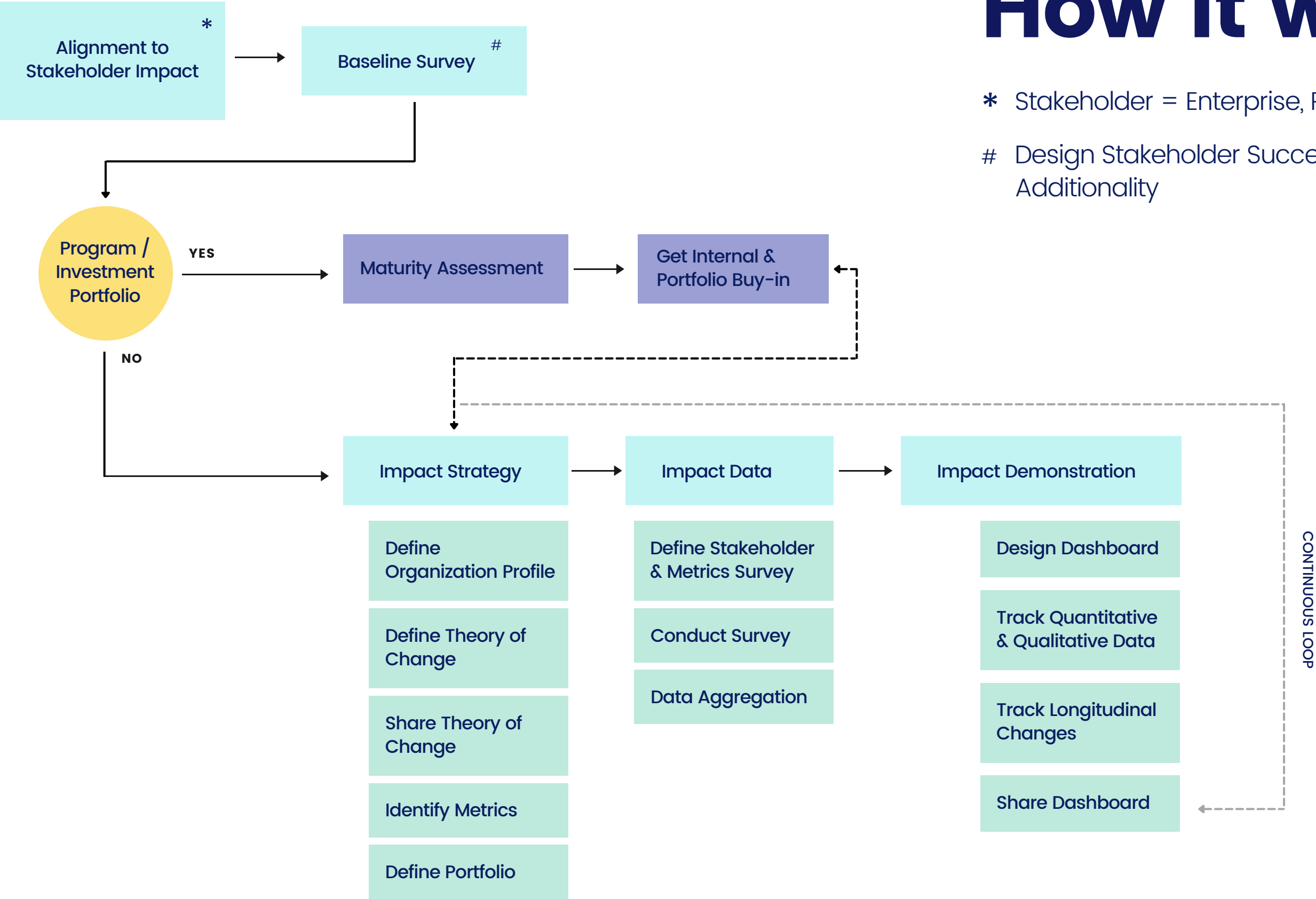
# Design Stakeholder Success Tracking +  
Additionality



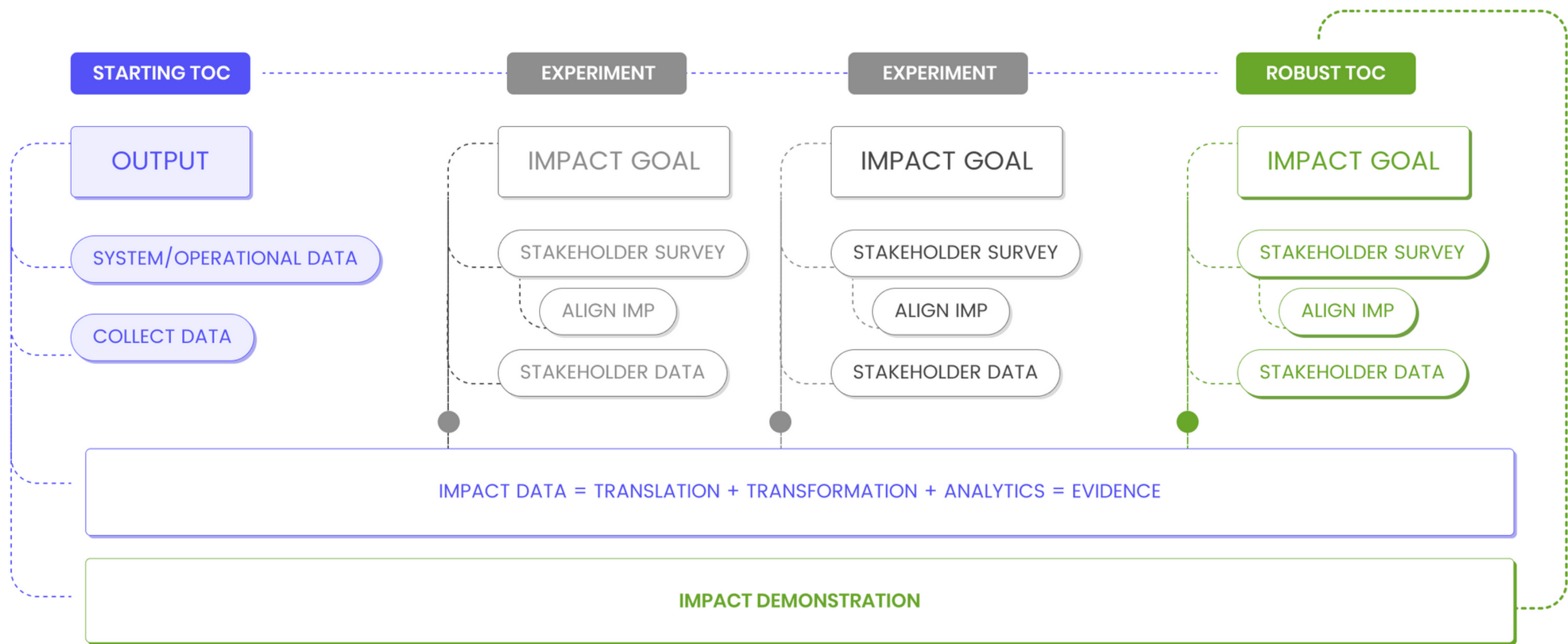
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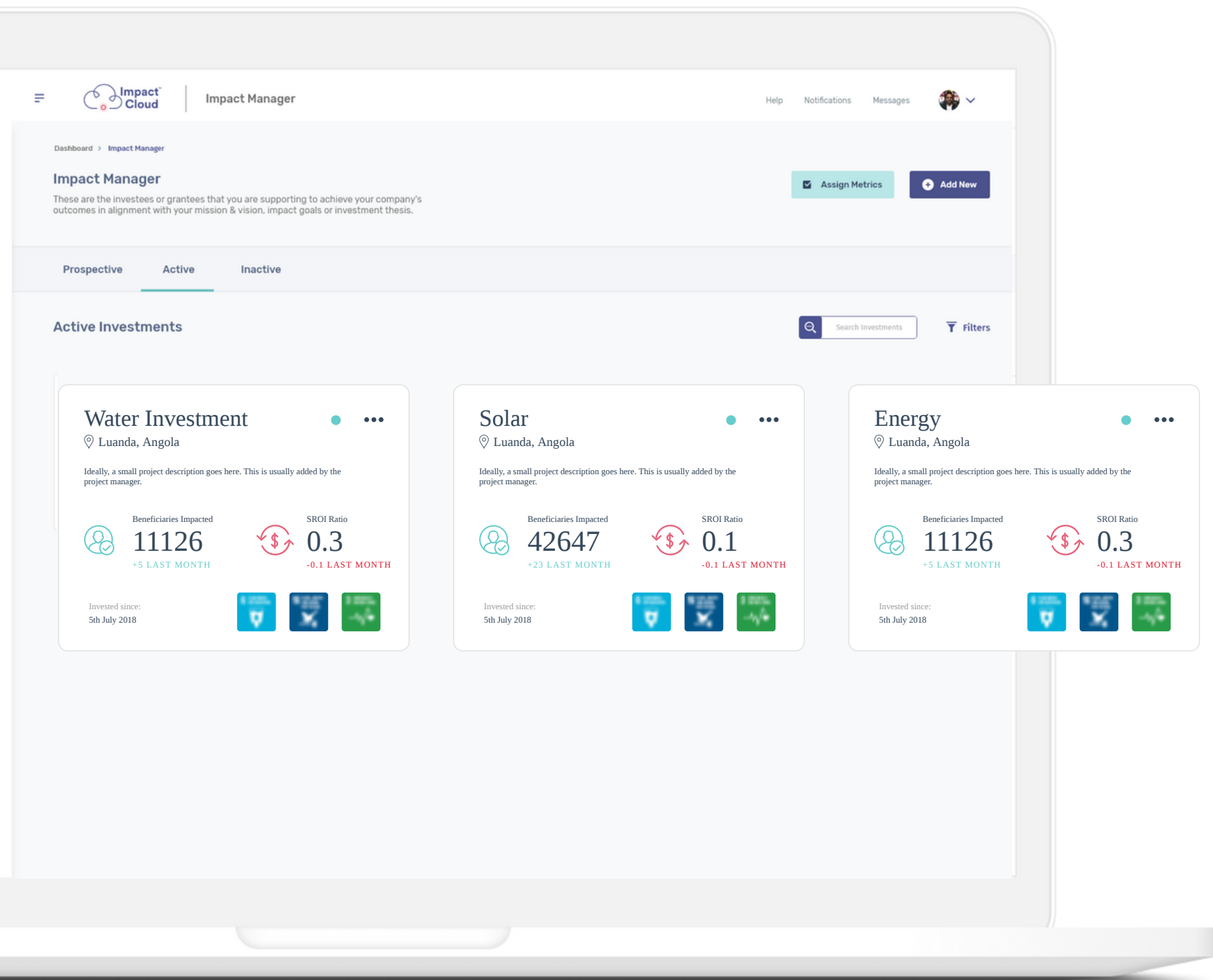


## Impact Cloud®

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Design impact strategy, comprehensive portfolio and data management, aggregation, and real-time dashboard promotes better impact management decisions

# Due Diligence



## Alignment to stakeholder impact

Parties commitment to listen to stakeholder and success definition

## Baseline Survey

Asset manager effectiveness assessment on non-financial support provided to investee

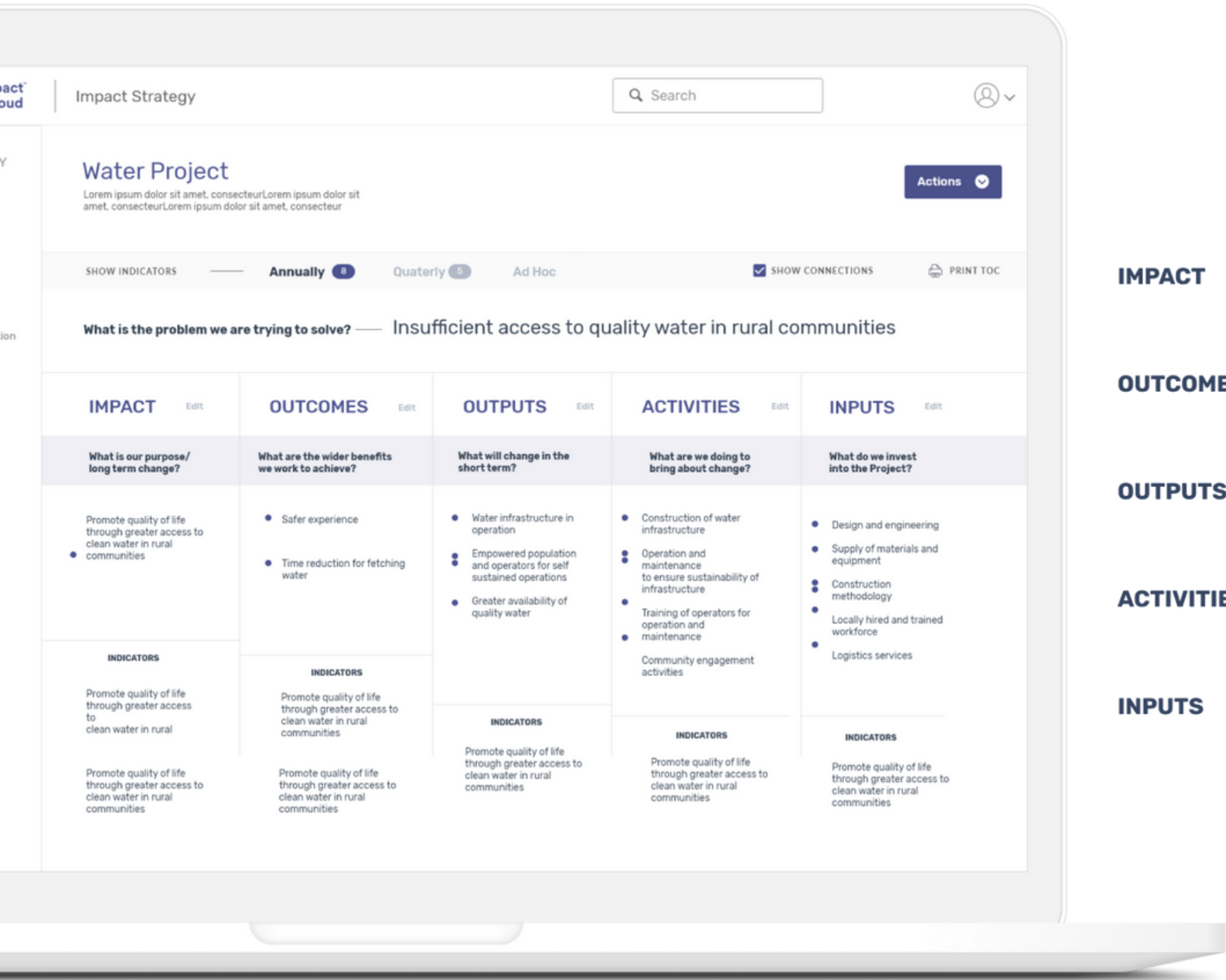
## Maturity assessment

Investee assessment for Impact Measurement and Management maturity level

## Get Internal & Portfolio Company Buy-in

Active and committed top management and investee for Impact Measurement and Management journey

# Impact Strategy



## Define Organization Profile

Build investment sheet with relevant investee information including alignment to SDG

## Design Theory of Change

Build impact thesis or 5 dimensions of impact framework

## Share Theory of Change

Share framework privately or publicly with stakeholders for collaboration and reporting

## Identify Metrics

Select or build custom quantitative or qualitative metrics aligned with Theory of Change or 5 Dimensions of Impact Frameworks

## Define Portfolio

Build investments and/or enterprises profiles for aggregated portfolio impact performance analysis

# Impact Data

## Define stakeholder and metrics survey

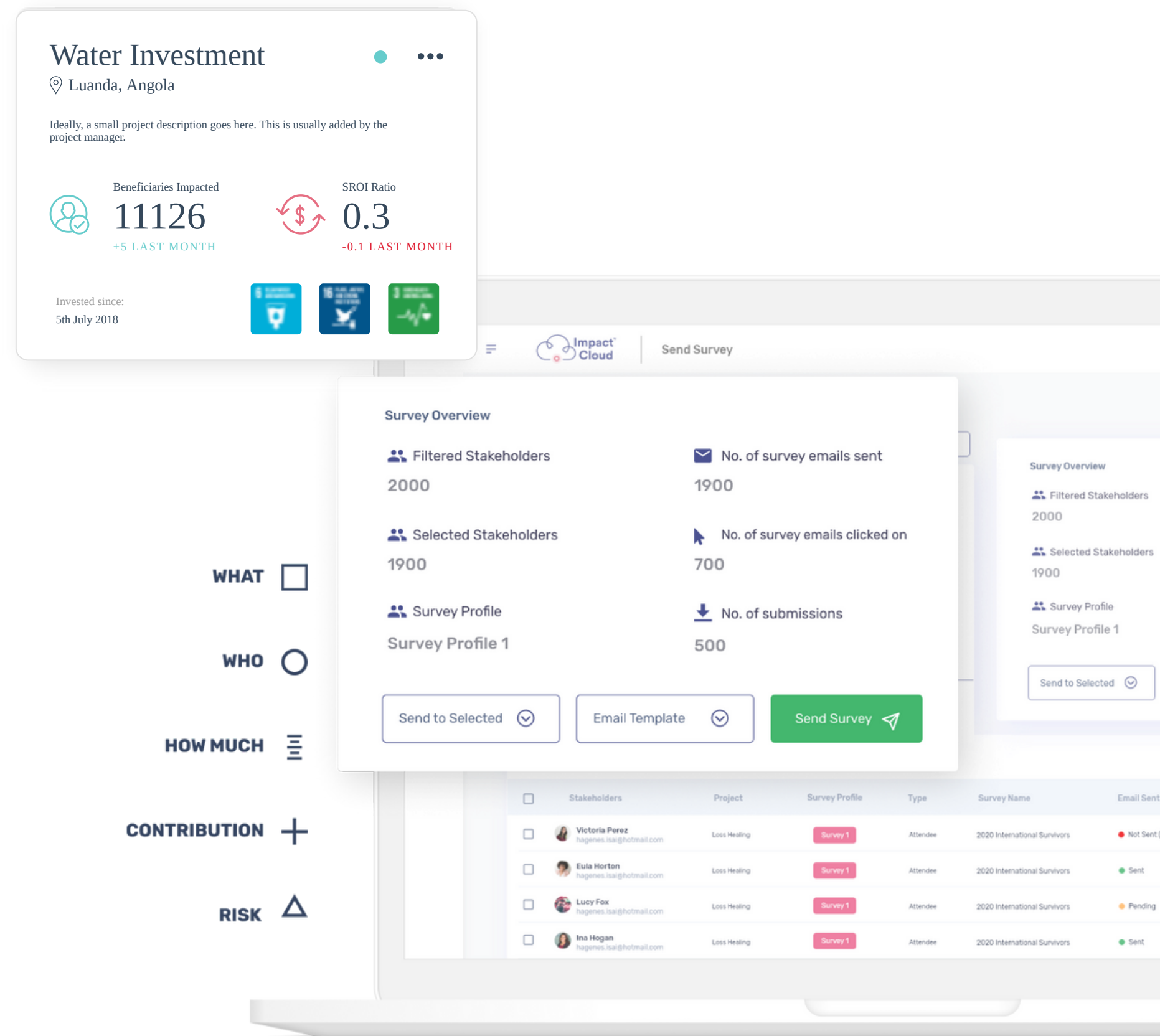
Design surveys for data collection both at metric level or stakeholder level. Design longitudinal survey to assess change over time

## Conduct survey

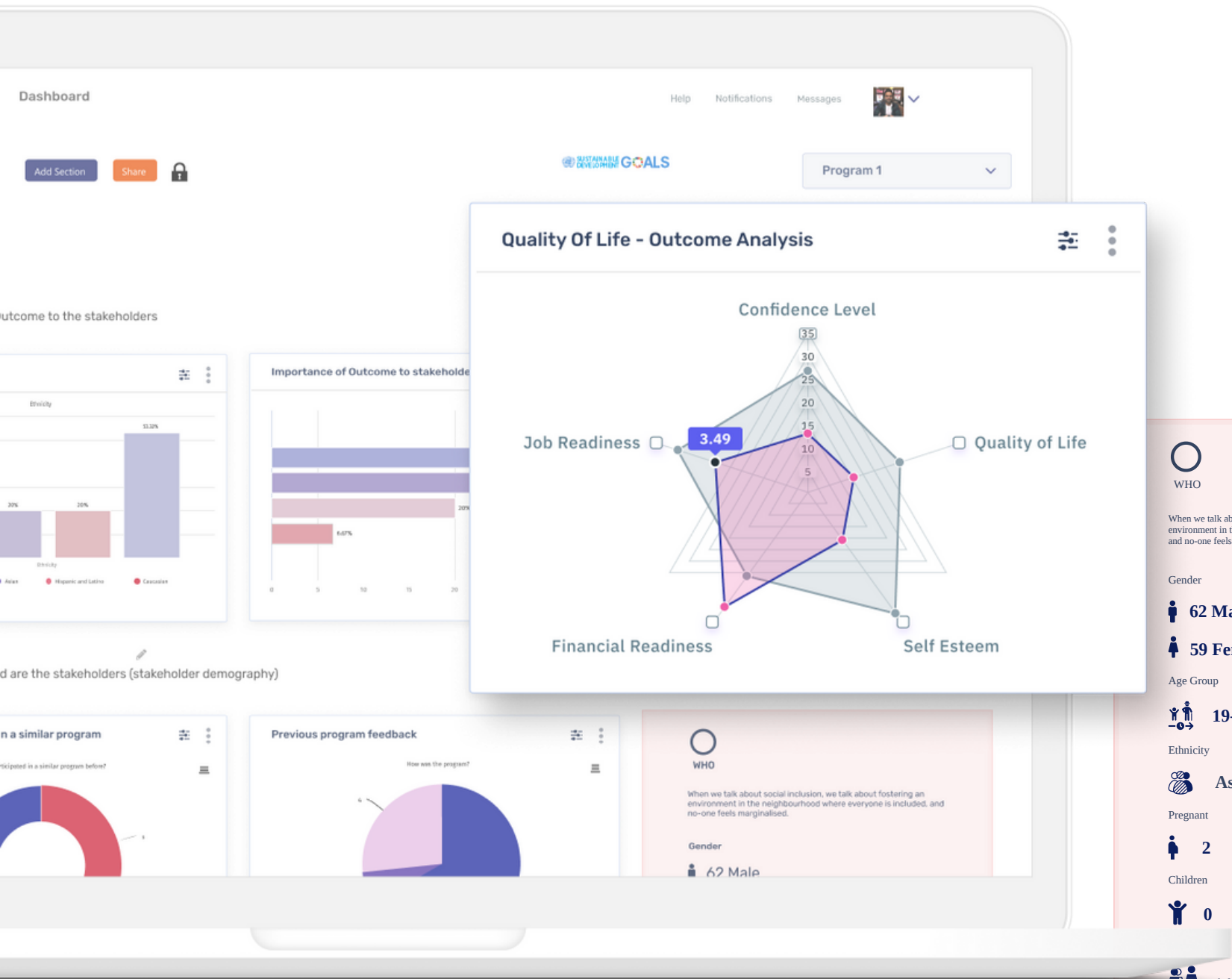
Deploy survey from Impact Cloud or integrate with known apps such as Kobo Toolbox or Survey Monkey

## Data aggregation

Aggregate data at portfolio level for core metrics for portfolio contribution assessment



# Impact Demonstration



## Design dashboard

Build analytics from the data collected based not only on activities or outputs but on outcomes

## Track quantitative and qualitative data

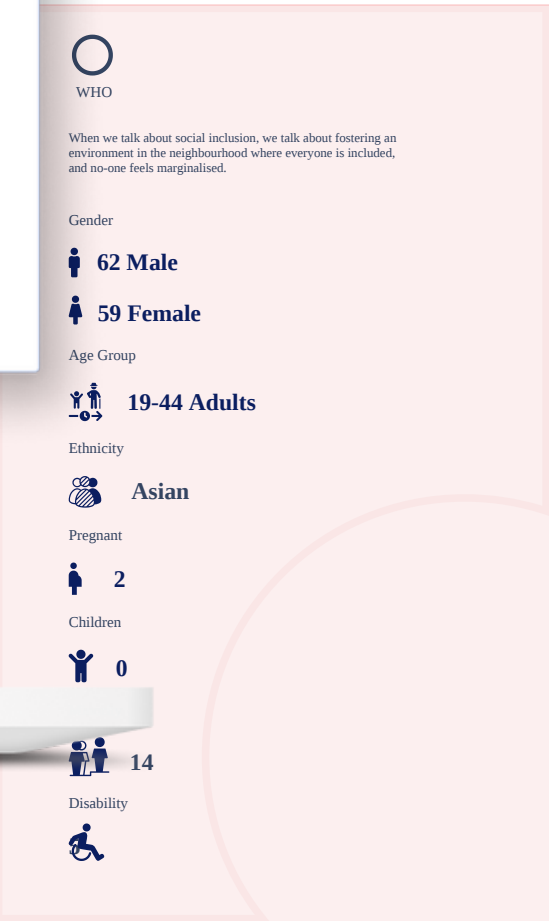
Generate insights for both quantitative and qualitative data collected

## Track longitudinal changes

Generate insights from longitudinal surveys to track change over time

## Share dashboard

Share report privately or publicly



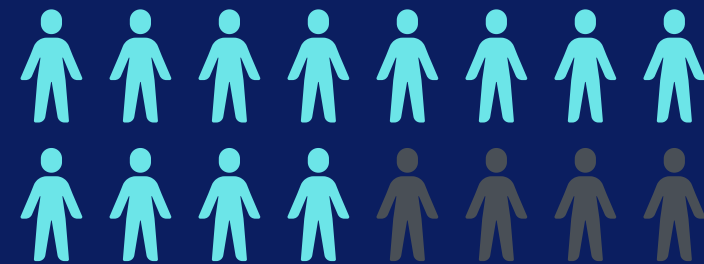
# Talk to us

To get access to all these features coupled with professional advisory in the scope of Impact Measurement and Management, all you need to do is take a short survey, pick a time on the calendar and our impact management consultant will reach out to discuss your impact management goals.

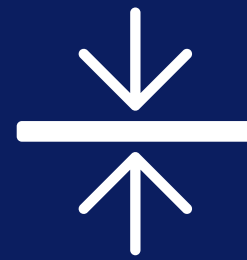




# Benefits & Outcomes



Improve short term and outcome impact journey based on well-defined impact management success criteria



Improve alignment between investment management, impact management, and enterprise portfolio teams



Improve impact management capacity based on well-defined training plans



Demonstrate impact, certification, and impact verification based on a globally accepted approach



Maximize the social impact of portfolio companies



# Align impact management goals better

## Before

**Investor defines due diligence template for investment team.**



**Impact evaluation is not specific to the impact of investment or stakeholders.  
As a result, they end up making decisions on sniff tests.**

## After

**Build a systematic tracking of both asset manager and enterprise allows a better alignment with impact management goals and process.**



**Access continuous understanding of impact. Investment can improve outcomes continuously.**

—→ **How can IMM be applied pre-investment?**

Prior to committing capital systematic approaches to examine impact are being utilized, though it remains an underdeveloped practice. Impact due diligence enhances investors' capacity to make more informed investment decisions and increases the impact of their portfolios. Above all, it also helps safeguard the entire field against "impact washing" as the market grows. Different approaches are used for impact due diligence, namely: narratives of expected impact, due diligence questionnaires, and quantitative tools. Investors employ two or all three approaches during impact due diligence.

—→ **Shall we listen to stakeholders at this stage?**

Best practices for impact due diligence show that elevating the Perspectives of Key Stakeholders, meaning incorporating the perspectives of those who are impacted by investees helps investors better align on impact goals, mitigate impact risk, amplify stakeholder voices, develop feedback loops between investors and investees, and assess both investor and investee contribution.

—→ **Is it enough to do negative screening?**

When assessing anticipated impact, investors should ensure they are evaluating all impacts an enterprise has that matter to people and planet including those related to business operations (i.e., ESG considerations) as well as products or services. In this way, investors can evaluate all impacts that matter—not just the intended positive ones.

—→ **How can we excel at winning organizational support?**

Educating internal stakeholders is one of the biggest challenges in any impact journey. Those responsible for developing impact due diligence approaches found it useful to ask feedback on specific sections of the impact due diligence tool and show how the tool would benefit the organization once implemented. In some cases by creating an internal advisory group it's possible to win buy-in from management, ensuring strategic alignment. By including both staff who interact directly with investees as well as senior leadership, research shows achieving early buy-in from all key stakeholders to develop a more robust impact due diligence approach.

# FAQs

# Portfolio alignment with investment impact thesis

## Before

**Inappropriate approach towards definition of impact thesis and alignment with international standards**



**Metrics identification not aligned with Theory of Change and portfolio goals**

## After

**Alignment between Theory of Change and metrics for both investments and portfolio**



**Clear relation between indicators selected and outcomes and impact**

—→ **What's the value of articulating our impact goals?**

Investors need to develop a deeper understanding of their impacts on key stakeholders. To develop an understanding of investments' impact, it is essential for investors to engage their key stakeholders to understand how their investment may affect them. This should be documented in logic models or theories of change or outcome maps. Investors should ask input from intended beneficiaries—or those with the closest relationships with them, which in many cases are existing investees—to understand how they are affected by the investor's activities. Through this approach, investors are better positioned to identify the outputs, outcomes, and/or impacts of their investment activities, which is essential to developing a robust impact management.

—→ **Can we incorporate SDGs during impact strategy?**

Incorporating the SDGs into impact strategy helps ensure that prospective investments' anticipated impacts align with the global development agenda, as well as enable effective communication about expected impact across a diverse portfolio.

This best practice is most appropriate for investors whose strategies are intentionally designed to contribute to the SDGs or whose objectives have significant overlap with the global goals.

—→ **Should we align with international standards?**

In order to identify metrics aligning with their logic models or theories of change, investors should first identify standards to which they want to align and following by choosing the right indicators. Many institutions developed their set of metrics like GIIN, Global Compact, various UN agencies and others. For example GIIN developed IRIS + that allows investors to select their impact theme and identify the metrics that most align with their goals.

—→ **How do you align with 5 dimensions of impact?**

Investors need to align with five dimensions of impact (what, who, how much, contribution, and risk) to ensure their impact goals are sufficiently comprehensive. Striving for coverage across the five dimensions of impact: It is important to ensure that the set of indicators selected assess impact across the five dimensions; developing coverage across all dimensions will likely require some refinement or customizations of standard indicators. Investors should strive to assess the dimensions often cited as more challenging to assess: Contribution and Risk.

# FAQs

# Simplified aggregation at portfolio level

## Before

**Difficulties at portfolio aggregation level  
due to use of different frameworks**



**Misalignment between enterprises' outcomes  
and impact and portfolio goals without clear  
contribution**

## After

**Standardized approach for data  
collection from enterprises and  
consequent aggregation at portfolio  
level**



**Straightforward aggregation of  
data from investment portfolio**

—→ **Why adopting a portfolio-wide approach is important?**

Investors should develop a consistent approach that enables direct comparisons of different types of investments across a portfolio. This is an essential component of effective, impact-driven portfolio management.

Sector-specific questions and indicators are in some cases necessary to achieve a sufficient level of rigor, particularly for those with diverse portfolios. However, investors should adopt sector-agnostic frameworks and generalizable questions and indicators, where possible, to ensure impact processes are more easily implementable and results are comparable across portfolio.

—→ **Is it possible to apply longitudinal data analysis?**

Organizations conducting impact evaluations can apply different types of experimental design to the two basic types of survey data: cross sectional and longitudinal.

In many cases, the data that inform these evaluations are longitudinal in nature. In other words, the evaluations exploit data that involve the repeated measurement of outcomes, behaviors and characteristics of individuals, families, or communities.

The nature of longitudinal data, whereby units of observation are observed more than once over time, opens the door to powerful statistical tools for impact evaluation.

—→ **How can Sopact help with impact verification and certification?**

Sopact has built a detailed process to align customer's impact goals that help align different standards, certification processes like IFC, SDG Impact, and systematic impact management goals of the enterprise. We have an extensive 50+ point comprehensive process that helps asset managers and enterprise verification processes. We evaluate all the criteria during our comprehensive managed services and review progress quarterly.

**FAQs**

# End-to-end impact management with improved impact learnings

## Before

**Cumbersome analysis, relying in multiple sources and error-prone assessment**



**Analysis often not based in outcomes and impact, but rather in activities and outputs**

## After

**Simplified data analysis for impact assessment**



**Outcome analysis with feedback loops for improved impact analysis**

—→ **How does this help to create feedback loops?**

For investors to maximize the value of their impact, they should use their assessments to inform both pre- and post-investment decision-making.

Establishing impact baselines and/or impact targets, against which investees' performance is assessed over time. Data collected should be analyzed having in mind improvements to product and/or service delivery in order to maximize outcomes.

Some investors link quantitative impact scores or some sort of impact performance to compensation and advancement meaning the practice of IMM is evolving to the point that expected impact is deemed as important as expected financial risk and return.

—→ **How do we commit to impact and learning?**

Investors should explicitly assess investees' commitment to achieving impact as well as their ability to improve, adapt, and learn. Specifically, investors should evaluate whether investees' impact thesis is clearly defined, their understanding of key stakeholders' needs, the robustness of their IMM systems, whether they have financial incentives linked to impact performance, and their ability to change strategies and tactics based on results. Overall, at portfolio level the same learnings should apply.

# FAQs



# HARD WAY



- Building Impact strategy:
  - Hire an impact practitioner.
  - Hire in-house expertise.
  - No Strategy, just a standard survey
- Impact Data:
  - Build in house technology solution (Consulting companies without technology can not operationalize impact management strategy)
  - Collect general data only
  - Collect data by outsourced enumerators
- Impact Demonstration
  - Hire a consultant to build an external report
  - Hire a resource to do internal reporting
  - No dashboard to get continuous learning

## RESULT

- Non-operational strategy
- Need technology consultant to build the solution
- Collect data with enumerators + Hire a data scientist
- No continuous data for operational decisions
- The missed opportunity of maximizing impact
- \$\$\$\$\$



# EASY WAY

- Expert impact management team to classify, verify as well as build internal capacity for any impact first organization
- Personalized tutorials, templates, and advisory
- The POWER of Impact Cloud, the best impact management platform – comprehensive, easy to use, and configurable.
- Build strategy, select metrics, align to global standards and operationalize it in the same platform.
- Collect or connect data from various sources, translate and manage.
- Continuous learning to make data-driven program decisions with shareable dashboards with complex permission management.

## RESULT

- Efficient impact learning with real-time data
- Save human and financial resources
- Maximize your social impact.

—→ **What exactly am I signing up for? What are the features and benefits?**

When signing up you'll be subscribing not only technology but also knowledge for Impact Measurement and Management including:

- Online learning management - allows building enterprise capacity based on personalized and actionable playbooks
- Impact management toolkit - promotes team collaboration for non-tech savvy users
- Impact Cloud - Our flagship impact measurement and management platform help streamline the impact management lifecycle. Design impact strategy, comprehensive portfolio and data management, aggregation, and real-time dashboard promotes better impact management decisions

—→ **How do I know if managed services is appropriate for us?**

After signing for Fast track, we offer you managed services where alongside the software-as-a-service subscription you'll have a professional advisory in the impact measurement and management space. With managed services we provide this coaching that allows you to grow on your impact journey and succeed in gathering evidence from your investments/programs. Managed service is a long-term agreement where you'll have access to all features and benefits without limitation.

—→ **What if I end up needing more support hours?**

When you receive the economic proposal, it includes a set number of hours that, according to our experience, will be needed to onboard, train, and advise your team appropriately. If your team ends up needing more support hours, Sopact won't charge any additional fees. Our ultimate goal is to make you successful, whatever it takes.

—→ **How about training to use your platform?**

Our software is easy to use and accessible. To support you in learning how to use it, we provide a knowledge base with a complete explanation of all features of our platform and provide you access to an online learning management system that provides you essential content to succeed in your impact journey whether you are starting, improving, growing or scaling. This content is available in short to digest videos or text base content that allows you to experiment as you go.

# FAQs

# Again, Who is this for?



- ◇ Asset managers focus on maximizing the social impact of portfolios.
- ◇ Focus is on Mature Impact First Asset Managers willing to aggregate portfolio data and wanting to collect stakeholder data who often work with investees (enterprises) with different levels of maturity when it comes to Impact Management practices.

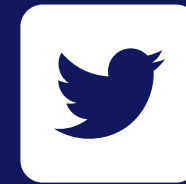


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