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Empowering Female Entrepreneurs—and Our Non-Profit—Through Greater Analytics

QLIK

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Data is more than just numbers on a spreadsheet or points on a graph. The right data at the right time can have an impact unlike anything else. At its best, data tells a story—you just need to learn the language. And in the hands of the right individuals, clear and actionable data can result in improving the lives of people within your community and beyond.

Depending on the quality and the source of the data (not to mention the ability to receive, organize, and analyze it quickly), applying the information can become complicated and messy. Implementing a process that simplifies data collection and storytelling can make all the difference.

Supporting Women and Small Businesses

Although businesses and nonprofit organizations have seemingly different goals, Namaste Direct has experienced the impact that good data can have on businesses, communities, and individuals.

Namaste Direct is a nonprofit organization that offers financial literacy and mentoring to low-income female-owned businesses in Guatemala. Through education programs and microloans, Namaste Direct has supported more than 4,000 women through the Namaste Business Development Program since its founding in 2004.

Our mission is to teach business owners how to effectively use the money they receive from a loan and to efficiently handle their income so they don't need to depend on loans anymore. We share best

practices that have proven effective over the years, such as separating business income from household finances, and various saving strategies.

The success of a female-led business has a profound ripple effect on communities. @NamasteGuate @qlik

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Over the course of a nine-month loan and financial education cycle, our clients are matched with a professional business advisor who makes monthly visits. Sometimes it takes our clients more than one cycle to get to a place where we're no longer needed, but they're worth the investment. Time and time again, we've seen that the success of a female-led business has a profound ripple effect on communities. Profits are spread directly to their families and as they become employers, other members of the community benefit as well.

From Mountains of Paper to a Clean Data Analytics Platform

Namaste Direct currently provides assistance to almost 400 clients, so we gather a lot of data about each client and her business. Back in 2012, none of our data was digitized—we just had mountains of paper records. Whenever a donor would request a file, we would have to pore over piles of physical documents to pull the necessary information. This took a long time and sometimes information was missed.

We initially invested in a customized database, but still had to transfer data manually into Excel spreadsheets. Some reports contained errors because of that manual data transfer from one source to another, and the amount of time required meant our reports took longer to create. This was stressful because Namaste often got large requests with strict deadlines, such as pulling data on 50 clients' businesses for a report due the next day.

Namaste needed a data analytics platform that could truly work for our needs. Luckily Qlik contacted our founder, Bob Graham, and offered their solution as a way for our organization to streamline its operations. We took a lot of care to establish the right criteria and formalize our internal data requirements as well as those for our donors. Once we had those sorted, the team created our dashboards in QlikView.

By 2014, QlikView was officially in place. The team was thrilled with our new visibility into our clients' reality and the status of their loans. It changed so much about how we share data with our donors and how we provide the right support to our clients at the right time.

## Enabling Data-Inspired Change with Qlik

It was around this time that I started working at Namaste. I was drawn to the organization's mission and thrilled when I got the job. After a few years, I left the organization to become an independent consultant. But when Namaste's director, Eugenia Duran, reached out to tell me they were creating a role specifically dedicated to continuing QlikView projects, it felt like coming home.

Up until then, we'd only been using QlikView and the free, cloud-based version of Qlik Sense. We were making progress in developing our data analytics capabilities, however, and now realized we needed more. It was time to expand our use of Qlik to include the enterprise version of Qlik Sense.

Our Qlik representatives saw how much we were able to accomplish with the free version, and through their corporate responsibility initiatives, they granted us enterprise Qlik Sense. This gave us the power to enable data-inspired change.

Different Features, Different Uses

Qlik has been a lifesaver for our team. When we get a request from a donor or from our founder, we don't say "No." Before Qlik, we would sometimes have to scramble to fulfill these requests. Now, we have tools that allow us to sort information in any number of ways, including how clients allocate funds, the average profit based on the type of business, the average age of the business, and so much more. We can also see everything from big-picture statistics to individual snapshots of a client and her business—all at a glance.
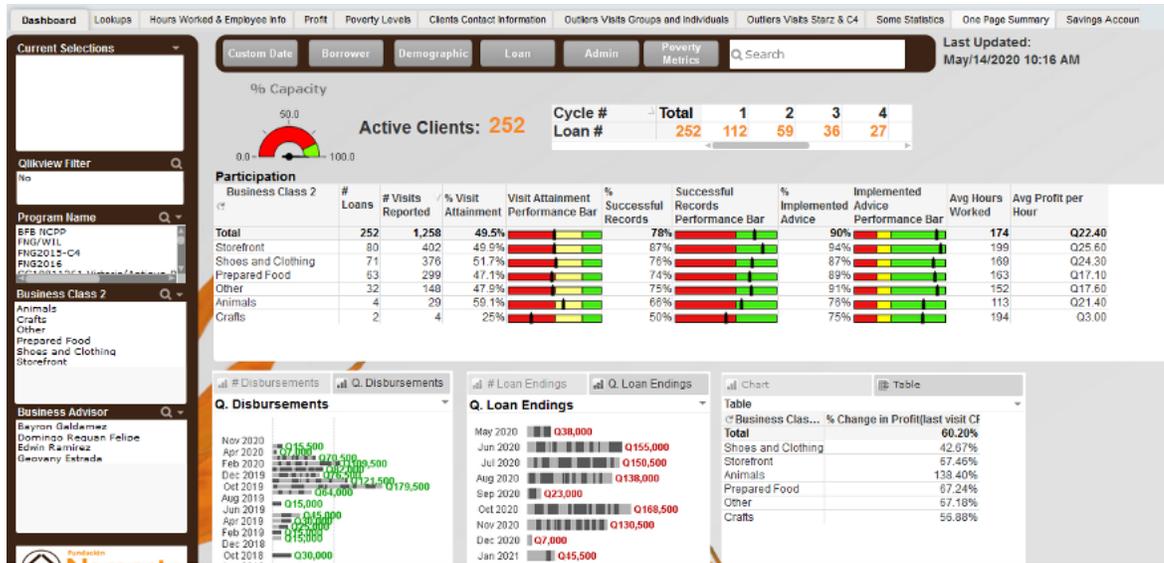
We mostly use QlikView for internal operational tasks and can examine client and company performance, both at a high level and on a granular level. This multi-layered visibility helps us better serve our clients. We can examine how each woman handles her loan payments, the individual impact of our financial education and advisory programs, and whether someone is a strong candidate for another loan or education cycle. Based on this data, we can make modifications to our plans and programs.

QlikView also reveals which clients are doing extremely well and what factors differentiate their success, versus other people who may be struggling. Sometimes it's just a matter of changing the personnel advising them. These insights benefit both our clients and our employees.

From Three Days to 30 Minutes: Moving at the Speed of Qlik

Qlik Sense is very visually appealing, so we use it to create reports for and share information with our donors. When donors see the reports in Qlik Sense, they're surprised at the level of detail in the presentations. We've received feedback from donors who say they haven't seen any other NGO provide such detailed information—they can see exactly what impact their donations have on the loan recipients. It's all accessible and easy to understand, and the data tells a story all in itself.

Donors appreciate NGOs that can share the data-driven impact of their contributions. @NamasteGuate @qlik

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In fact, we've secured additional grants due to the QlikView reports we submit at the end of loan cycles. They show these donors and committees an incredible level of accountability throughout the entire process. When the results are positive, they can see what strategies and tools Namaste is using to support our clients, and what actions the client has taken on their journey to success. When the results aren't positive or are unexpected, they can see from the data exactly where things went wrong, why they went wrong, and how we reevaluated our plan from there.

Before Qlik Sense, when a donor asked for a report, it used to take Eugenia up to three days to pull the necessary information, transfer it, build the report, and share it with the donor. Creating the same report in Qlik now takes just half an hour. The time savings really add up when you consider just how many donors and how many program mentees we have. Eugenia has said that QlikView is the best invention since sliced bread.

Exploring the Possibilities: Storytelling with Data

Both Namaste and our clients have begun to see the impacts of COVID-19 on business. QlikView has helped us to make critical decisions about which business owners we need to help directly based on the revenue they're earning and additional stressors, such as their husbands losing their jobs or the transportation shutdown across Guatemala.

We can show this data to our donors and tell them exactly how their donation, for example, will help one woman recover from recent losses and stay afloat for the next month. QlikView allows us to quickly and accurately capture this information and get it into the hands of people who can help.

I'm currently working on a new dashboard in Qlik Sense that compares our clients' data over a three-year period. It will analyze a client's performance as well as keep track of their payments. When complete, we'll be able to check our clients' progress over the years to compare how well they were doing three years ago to how they're faring now.

If we didn't have Qlik, it would take so long to gather and present the data that it would be out of date by the time the presentation was complete. Because the data is now instantly and automatically imported from our database to Qlik, we don't have to think about that process.

This new dashboard will support the quality assurance project we began last year. We ask our clients what they think about our programs and what features they find the most valuable. QlikView allows us to review early results of that project and see which women mostly prefer the educational aspect versus those who prefer the business advisory support.

Early results from our monthly check-ins suggest that clients value mentoring and education more than an actual loan, and show that education has a longer-term impact on these women's business success. That reassures us that our mission is on the right track.

Data-driven change allows you to measure outcomes and ensure that your mission is on the right track. @NamasteGuate @qlik

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Qlik Sense also allows us to further explore the storytelling aspect of our data. We can create templates that focus on a specific aspect, which we can then replicate easily and find more information around that aspect for donor reports. This further speeds up our report-creating abilities to less than 30 minutes per report.

The search feature in Qlik Sense is another fantastic tool—I can type in a question and receive the charts that contain the answer. It's helping us to mine our data as best we can to better tell our clients' stories.

Our Clients' Financial Future, Driven by Data

The Qlik community is so supportive that we've never had to figure things out on our own. In a way, Qlik's help mirrors the type of assistance we offer our clients. When people have support and are empowered by the information they need, they make better decisions and can succeed sooner than they could alone.

QlikView and Qlik Sense have helped us to prove that investing in women-owned businesses—and then providing ongoing support—has a lasting impact on their success.

We're still exploring ways to further leverage our data analytics platform so that we can make sense of all our data, and use it to tailor our programs and offerings. The power of data helps Namaste Direct accomplish our mission and change the lives of thousands of women—and their communities—for the better. And those are the stories we can't wait to share.