Deployment Validation Framework

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MFI Overview (P1)

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| 1. Name of MFI |  |
| 1. Location of MFI |  |
| 1. Regions Served |  |
| 1. Lending Methodology (i.e. Grameen Methodology, Self Help Groups, ASA methology, etc.) |  |
| Please enter a brief description of the MFI including its history, mission, along with strategic goals for the coming years: | |
| 2. Size of the MFI |  |
| 1. Number of Active Clients |  |
| 1. Loan Accounts |  |
| 1. Savings Accounts (if applicable) |  |
| 1. Number of Members |  |
| 1. Number of Branches |  |
| 1. % of Clients Below Poverty Line |  |
| 1. % Women Clients |  |
| 1. Total Size of Loan Portfolio |  |
| 1. Average loan size |  |
| 1. Staff |  |
| 1. Loan officers |  |
| 3. What is your current/previous MIS? |  |
| 1. # of years it has been in use |  |
| 4. What is current accounting system? |  |
| 5. Date Deployment Started |  |
| 1. Date Deployment went Live |  |

Documents to Collect (P1)

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| Document | Status |
| * Copies of all reports that they use outside of Mifos (Excel, etc – both previously and currently) |  |
| * PDFs of any Mifos reports they’ve built |  |
| * Reporting templates (downloadable from the application) (BIRT - .rpt files, Pentaho, Jasper, etc.) — if they’ll provide them |  |
| * Any process manuals |  |
| * Any Mifos training materials |  |
| * Mifos configuration settings:   + Go to “Admin” screen and click “View Organizational Settings” and print that screen   + Collect the following files:     - applicationConfiguration.custom.properties (most critical)     - mifosChartOfAccounts.custom.xml.     - mifosBeanConfig.custom.xml |  |
| * Any project schedule * Growth projections for next 3 years * Data (often captured in a report) that is moved from Mifos into the accounting system |  |

Things to Do/See (P1)

If the MFI says that Mifos is used in production…

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| Task | Notes |
| * Visit a branch office and see daily data entry occur |  |
| * Watch them print out collection sheets |  |
| * Watch them generate end-of-day reports |  |
| * Document how they are using Mifos at the head office (What departments are using it and for what) |  |

Overall Goals

Verify that:

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| **Task** | **Notes** |
| * **Mifos is being used to support all branch operations (those branches that are servicing MFIs micro-credit operations, in support of their unique operational model)** |  |
| * **Mifos is the primary management information system (specifically that the data captured in Mifos is being used in their accounting system or record keeping books)** |  |
| * **Making operational or business decisions (in regards to its loan and savings portfolio) based on data from Mifos** |  |

Business Motivations (P1)

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| How did you discover Mifos? What was the guiding decision factor behind selecting Mifos? |
| What is your projected growth for the next three years? Most important: client growth, branch growth, and loan portfolio growth  What are the top three factors that will accelerate your business? |
| What are greatest internal information needs? What are your greatest external information needs? |
| What are top three reasons to automate (pains currently facing) |
| What are the top three improvements you hope to gain from Mifos (expected benefits)? |
| What is your budget for IT? Has this budget changed with Mifos? How do you prioritize what you spend on technology? |
| What are the key technology innovations that will be important in the future (1 – 3 years)? |

Business Impact: Only applicable if MFI is running Mifos in production (P3)

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| What are the top three benefits you’ve realized since using Mifos in production (actual benefits)? |
| How have you made productivity or efficiency gains since using Mifos? |
| Please describe how reporting and consolidating information has been improved with Mifos? |
| How has Mifos helped you better serve your clients? |
| Please describe how upper management has adapted to using Mifos? How have operation staff adjusted to using Mifos? Was there any resistance? If so, how was resistance overcome and user adoption gained? |
| How (if so) has Mifos lowered the burden and responsibilities for IT staff? |

Deployment Process Overview

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| 1. Deployment Stage: (P1) | |
| At what stage of the deployment are you in? (To the interviewer: please see Mifos deployment methodology doc for overview of different stages) |  |
| Please outline the steps/stages of the deployment, provide activities and time frame of each stage. | |
| To how many branches has/will be installed? |  |

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| 1. Requirements/Gaps (P1) |
| How did you identify the MFIs requirements for the software?  What gaps were identified prior to beginning the deployment?  What gaps were identified during or after the deployment? |
| What are the major functional requirements that Mifos met most effectively for the MFI? |
| What functional requirements has Mifos met least effectively? |
| What were the 2-3 largest functional gaps? |

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| 1. Resources (P2) |
| Who are the team members and their roles driving the deployment? |
| Who did you work with regularly from the MFI during the deployment (applicable to Specialist)? |
| How did you communicate about the deployment to the MFI staff? To the MFI management? |
| Did you hire an outside vendor? If so, please state who and their roles. |

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| 1. Configuration: (P2) |
| What areas of the application were configured specifically to the client’s requirements? |
| Where there any specific customizations?  Get a list of their loans and saving products (including details on interest, etc.) |

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| 1. Data Migration (P1) | |
| What data, if any, did you migrate from the previous system? | |
| Did you migrate? | (1) Historical Data |
| (2) Current Clients & Opening Balances |
| (3) Enter new loans when they were disbursed |
| How did you do the migration? Via scripts or via manual data entry? | |
| How long and how many resources did data migration take? | |

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| 1. Reporting (P1) | | |
| Have built any new reports for Mifos? Who built these reports? | | |
| Please attach copies of the reports. If copies don’t exist, please provide a list of the reports you use and a brief description (take screenshot of reports page) |  | |
| Are you using the reports included in Mifos? | | |
| If so, which ones? | | |
| How long did it take you to learn how to build Mifos reports (if applicable)? | | |
| Did you find building reports to be easy or difficult with Mifos? What would have helped you? | | |

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| 1. Processes: (P3) |
| Did the Mifos deployment require the MFI to update their process manual? |
| Are your processes standardized and were they documented before? |
| Who did this work (the MFI? Vendor?) |
| When did this work happen in the schedule? |

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| 1. Training(P3) |
| Will or has training been conducted across key personnel in the organization? |
| Who conducted the training? Who developed the training materials? |
| When, in the deployment, was training conducted? How long were the training sessions? |
| Who attended the training? |

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| 1. Acceptance: (P3) |
| How did you test Mifos during the deployment? |
| Who was involved? |
| When did it happen in the schedule? |
| Did you test with live data or at a branch? |

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| 1. Support/Upgrades: (P3) |
| Who is providing the support for Mifos? |
| Is there an internal helpdesk? How many people work on the helpdesk?  Do you have a test server set-up?  What is your process for upgrading Mifos?  What challenges have you faced upgrading Mifos to date? |

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| 1. Accounting and other systems: (P1) | |
| What accounting system do you use? Is this used at branches as well or just the head office? |  |
| What data is moved from Mifos into your accounting system?  How do you move this data? Manually? Automated?  Who is responsible for moving this data? How often is data moved? | |
| Are there other systems you’ve integrated or plan to integrate Mifos with? | |

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| 1. Infrastructure (P1) | |
| Is this a Cloud-Based or Hosted Deployment of Mifos? If Cloud-Based, please provide specifics regarding your Cloud Instances. | |
| Server | |
| Please collect the specifications of the Mifos server: | **RAM:** |
| **CPU:** |
| **Disk Drive:** |
| **Operating System:** |
| Are they using a separate machine for DB server – if so, what are those specifications? | **RAM:** |
| **CPU** |
| **Disk Drive** |
| **Operating System** |
| What type of connectivity and what upstream/downstream speed do you have for the server? | |
| Where is the server located? At the head office or at an offsite hosting facility? | |
| How are your backups being handled? How often do you do incremental back-ups? How often do you do full back-ups? | |
| How power outages being handled? | |
| Client/Branch Computers | |
| What operating system and browser are you using? | |
| What type of connectivity (dial-up, DSL, etc) and speed do you have at the branch offices? What power/connectivity problems have you encountered to date? | |

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| 1. Security: (P3) |
| What has been done to secure Mifos on their internal network? |
| Have you created any new IT policies? |

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| 1. Rollout (P3) |
| How are you planning on or have conducted your rollout? |
| How long will/did it take? |
| Are you switching to Mifos immediately or planning on running parallel to current MIS or loan tracking process? |
| How are you validating the rollout was a success? How at a branch level? |

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| 1. Support & Post-Deployment (P1) |
| What is the plan for ongoing support? Technical/IT? HelpDesk/Support of the Application? |
| On a scale of 1 to 10, how comfortable do you feel with your ability to support/maintain/upgrade Mifos going forward? How could this be improved? |

Deployment Improvements (P1)

1. What were the largest blockers that prevented you from moving into production sooner?

What tools/resources aided you most in the deployment of Mifos?

1. What has taken longer in the deployment process than you expected? How can we make the deployment process smoother?
2. What additional tools, resources or templates would help you the most? How could we make tools easier to use/find?
3. Have you turned to the mailing lists for support with your deployment? For what topics/areas did you find the mailing lists helpful? In what areas/topics was the mailing list not helpful?
   1. How can we make it more effective?
4. What is the best form of communication with Mifos? How can Mifos team better interact, engage and collaborate?
5. How can Grameen Foundation best support Nuru going forward?