

ALTAMONT DIGITAL

Impact Management Platform

90-Day Pilot Pack

Operational and results feeder layer — people, purpose-based consent, delivery evidence, and policy-bound spend. Complements central dashboards and finance systems; does not replace them.

1. Purpose of the pilot

Prove that programme teams can keep a **system of record** at the edge of the organisation so Secretariat and board discussions use **structure**, not another reconstruction from Excel and inboxes. The pilot measures residual capacity and whether a clean export can support a real conversation — not a feature tour.

2. In scope (90 days)

Area	What we exercise
People & consent	Registry + purpose-based consent (grant / revoke history)
Programmes	Programmes, enrolment, basic delivery link
Delivery	Activities / milestones + optional evidence attachments
Import	Historical or live CSVs via the Import workspace
Export	Pilot export pack (UTF-8 CSV) for a real discussion
Optional	One ImpactEMS path (claim or card match) if finance is in the cohort

3. Out of scope

- Bank feeds · full ERP · payroll
- Offline field / mobile data collection suite
- Replacing Azure, Snowflake, Power BI, or the central data platform

4. Success criteria (pass / fail)

1. Data loaded for the agreed cohort (import and/or manual entry)
2. At least **three people** using the app in a normal week by day 60
3. Consent trail recorded for a **sample** of people
4. At least **one export** used in an internal or Secretariat-facing discussion
5. Written close-out: what worked, what to change, residual capacity vs triangulation

5. Cadence

Kick-off → access, cohort, whether finance is in scope · **Mid-point (~day 45)** → usage, import quality, blockers · **Close-out (~day 90)** → export sample, retrospective, decision on Year-1.

6. Commercial posture

Fixed pilot fee (or credit toward Year-1 if you continue), as agreed in writing. No success commission on grants. Diagnostic work can remain separate or credited per the engagement letter. This pack does not amend commercial terms.

7. Demo script (~25 minutes)

Min	Show	Say
0–3	Home / sign-in	Feeder layer; organisation isolation; complements the centre
3–8	People + consent	One registry; purpose-based consent; not a second spreadsheet
8–12	Programmes + enrol	People linked to a programme with a clear trail
12–16	Activity / milestone + evidence	Delivery that survives staff turnover
16–20	Import (or results)	Historical load; summary: created / skipped / linked
20–23	Reports → Pilot export pack	CSV the centre can use in a real discussion
23–25	Optional ImpactEMS	Policy-bound claim or card line — only if relevant
Close	—	Success criteria + 90-day ask; questions

Rule: Use live pilot data or a prepared organisation — avoid empty screens.

8. Sample data notes (before import)

Order: Beneficiaries → Programs → Activities / Milestones.

Beneficiaries (minimum): First name, Last name · optional email, phone, gender, date of birth, notes · External ID / Paper Code if you use them · consent on import or later

Programs: Name · optional status, dates, description

Activities / Milestones: Title · date · optional beneficiary **name** and programme **name** (close match helps auto-link)

Tips

- One organisation = one pilot tenant — do not mix membership associations in one login
- Prefer UTF-8 CSV; download templates from the Import page in the app
- After import, read the summary card (created / skipped / failed / linked)
- Unlinked delivery rows are normal on a first pass — fix names or link manually

9. 30-second talk track

“IMP is the system of record for people, consent, delivery evidence, and policy-bound spend at the edge of the organisation. Teams stop rebuilding the same lists for every report; the centre gets structured exports into the dashboards they already trust. We are not replacing your data platform — we are feeding it. A 90-day pilot is how we prove residual capacity with your cohort, not a slide.”

10. What to send / request

Send: this pack · live app link · who is invited (Admin vs Staff) · optional 25-minute demo slot

Ask: cohort size · whether finance (claims / cards) is in or out for 90 days · primary operator names · preferred kick-off week

Altamont Digital · Impact Management Platform · Pilot pack for engagement discussion
Product complements central systems; it does not replace bank feeds, full ERP, or enterprise BI.