INSIGHT TO ACTION
PLATFORM OPPORTUNITY

What’s Been Done – The “Back of the Napkin”

**PHASES 1 & 2: FALL 2022 – SPRING 2023**

IDIF was selected twice to partner with Columbia University’s SUMANI program, who were critical in building the first two phases of the platform. Phase I was the development of an Airtable interface and Phase II was getting the ITA platform one step closer to being a publicly viable tool. Together with IDIF, the students were able to accomplish the following:

- Categorize the entirety of IDIF’s DEI research database and materials by resource type and keyword, making them searchable.
- Analyze all content to capture relevant keywords, subject matter, and publisher type.
- Create a framework for development of a public-facing platform.
- Collect qualitative and quantitative feedback from relevant user groups
- Gather feedback and identify enhancements needed, making recommendations for future design
- Assess the degree to which the data can assist in business objectives and document use cases for the Platform

What’s Next – With Your Contribution

**PHASE 3 & 4: FALL 2023 – SPRING 2024**

With your catalytic support, we are looking to complete the next phases of the Insight to Action Platform, and truly create the “Google Maps” for Financial Inclusion.

**PHASE 3**

- Hire staff to develop the platform from a “back of the napkin” Airtable tool, to a user friendly and robust and trusted resource.
- Implement Feedback from SUMANI research groups including gaps in data and searchability
- Expand library of resources, data, assets
- Update features including search and filter mechanisms, add keywords – increasing SEO

**PHASE 4**

- Define a communication campaign to drive usage of the Platform
- Build submission repository and review process, collecting contributions from stakeholders
- Continue to maintain and grow data, verify relevance, due diligence, etc.
- Identify the gaps and when new resources are become available
- Improve usability – Metrics, upvoting, tagging, favorites, case studies, shareability, etc.

IDIF’s “Insight to Action” Platform, a “Google Maps” for Financial Inclusion, will be a free and public resource that will coalesce the networks, resources, and leading practices needed to make the financial asset management sector more inclusive of historically excluded groups.

We believe the ITA (Insight to Action) platform will be THE trusted source for practitioners within the financial services industry to source relevant data as it relates to diversity, equity, and inclusion. This is just one of IDIF’s THREE PRIMARY programmatic initiatives to move the needle, and change the 1.4%.
We need your support to make ITA a public, free and trusted data resource that will merge the networks, resources, and best practices needed to make the financial asset management sector more inclusive of historically excluded groups.

ABOUT IDiF:

IDiF is a non-member 501(c)(3) driving equitable access to capital to accelerate economic justice, power, and influence. Through our education and awareness programs, IDiF shines a light on the opportunities, organizations and leaders across the DEI landscape.

RESOURCES:
(click the link below)

Insight to Action Video Demonstration

Phase I: Fall 2022 Report from the SUMANI students

Phase II: Fall 2023 Report from the SUMANI students

Insight to Action Usability Report

THE INSIGHT TO ACTION PLATFORM INTERFACE: