

Transnational Capacity Building workshop 4
**Boosting Social Impact
Measurement Capacity
through digitalisation & data use**
29 January 2026 – Italy (Online)

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***Social Impact: Digitalisation and AI
Integration***





Triadi

Triadi - Key areas of activity



- Materiality analysis and strategic positioning
- Theory of Change design and implementation
- Impact assessment, evaluation and monetisation
- Compliance and alignment with international standards and regulations
- Reporting & disclosure

- Onboarding session for C-level & executives
- Practical workshops on impact evaluation methodologies and tools
- Capacity building programs
- Updating sessions on international standards and regulations

- Support in digitalization process and integration of impact methodologies
- Development of tailor-made tools for impact management and evaluation
- Digital platforms and AI-powered solutions for monitoring and reporting

OUR CUSTOMERS



Asset Managers and Banks

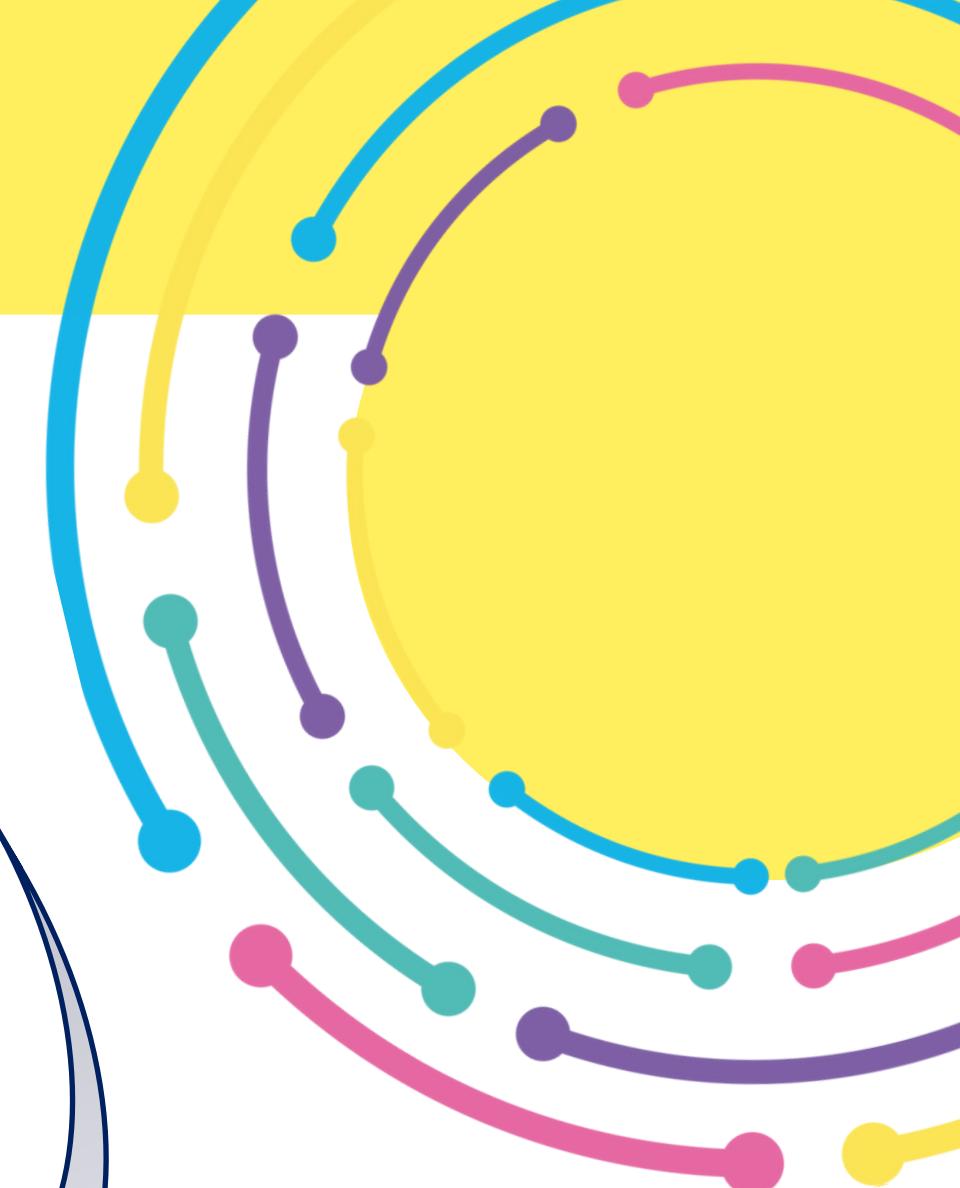
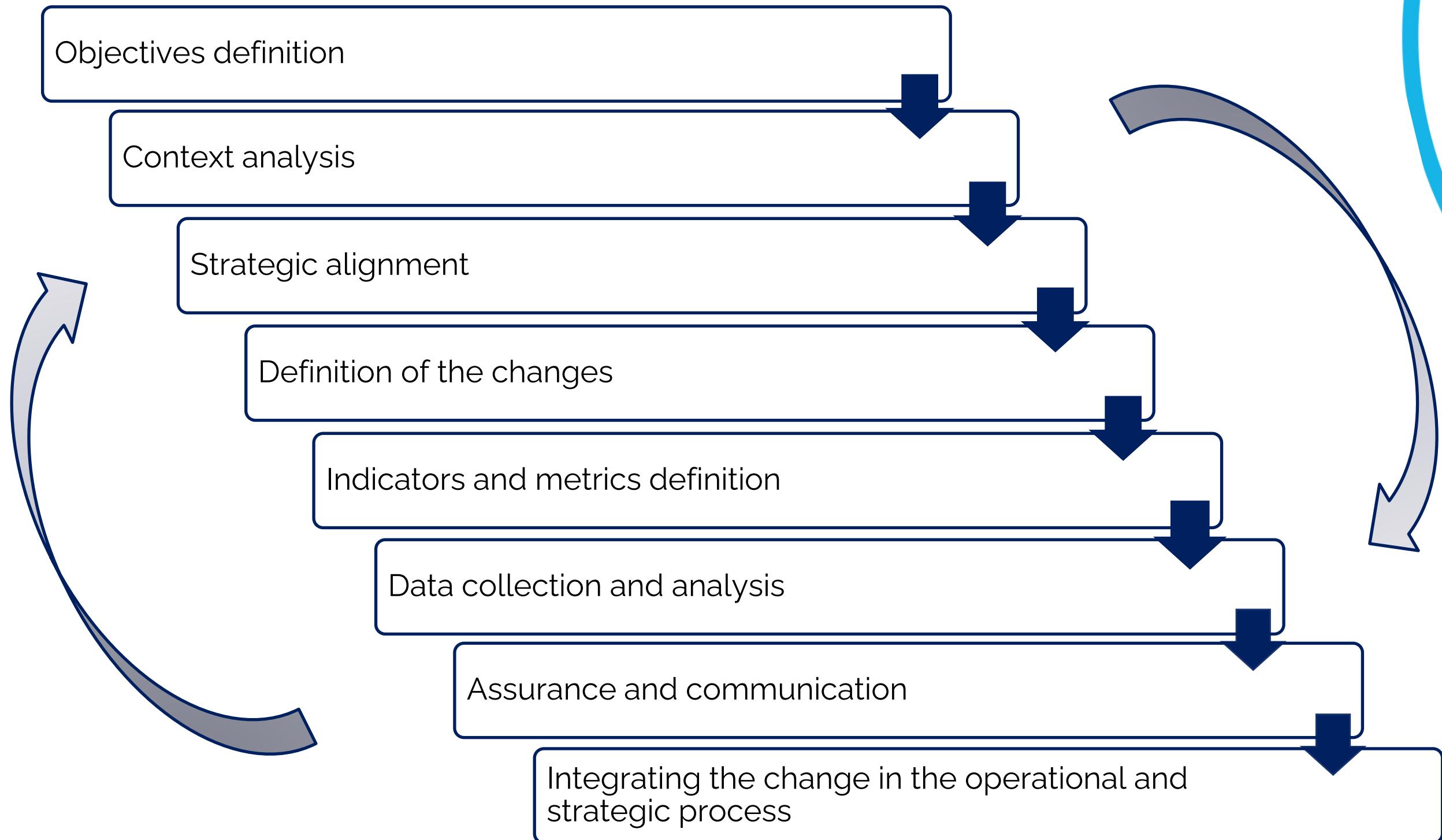


Corporates and SMEs

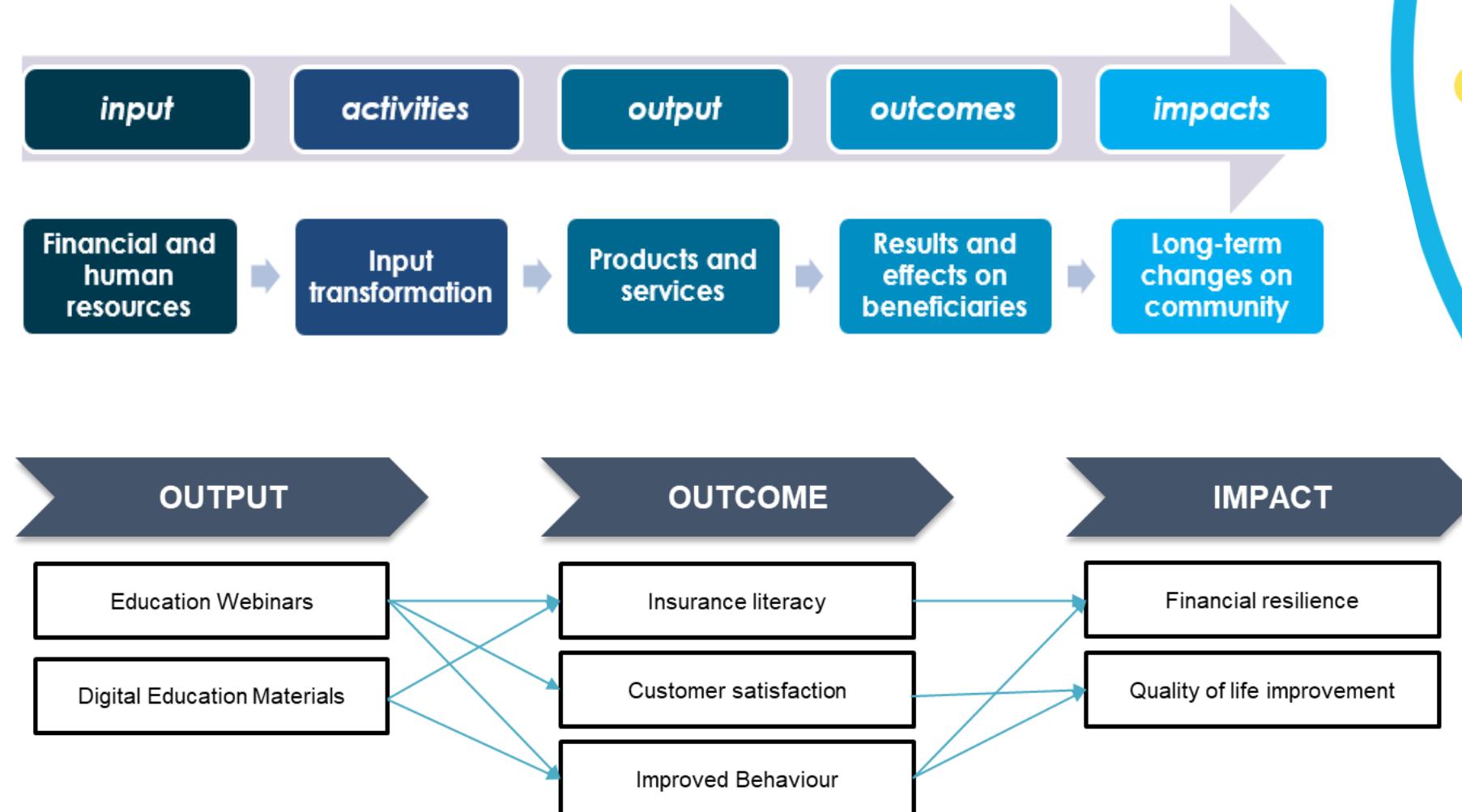
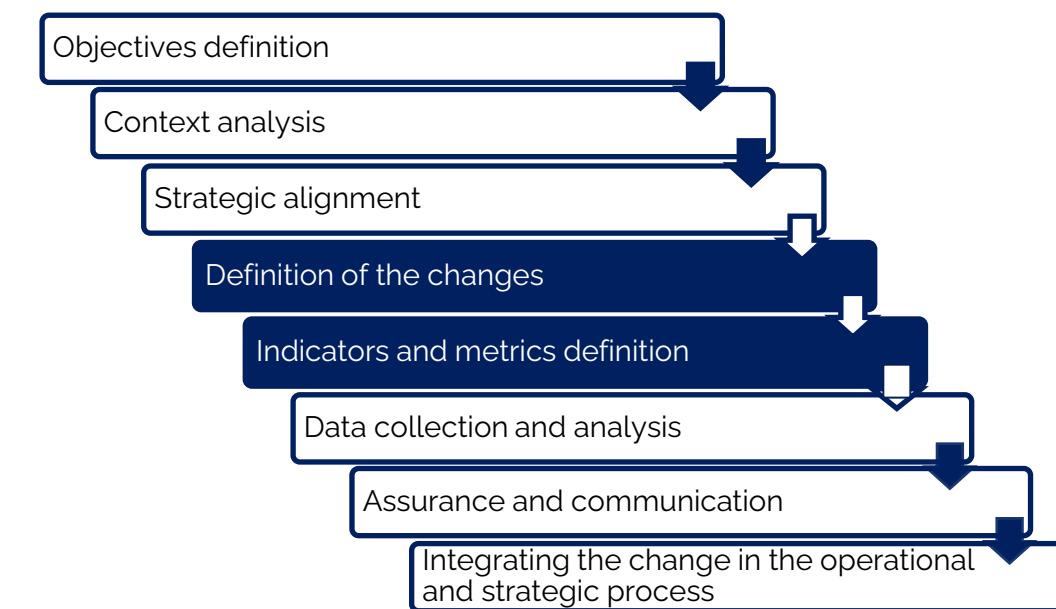


Not for profit, NGOs, Foundations

The Impact Measurement and Management Process



Impact Measurement and Management Process

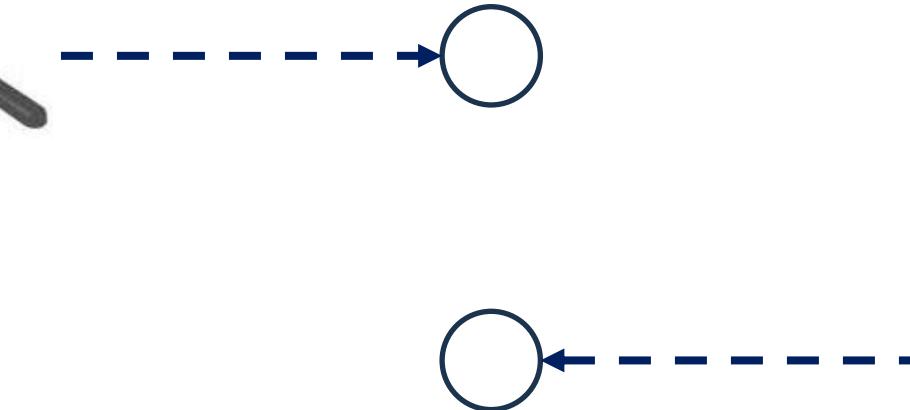


Output (indicators and metrics)
Number of insurance webinars conducted (Count of workshops held per reporting period)
Hours of insurance education provided (Total hours spent conducting workshops and educational sessions)
Quantity of educational materials distributed (Total number of brochures, guides, and online resources distributed)
Completion of webinar series (Percentage of participants who completed the entire insurance workshop series)

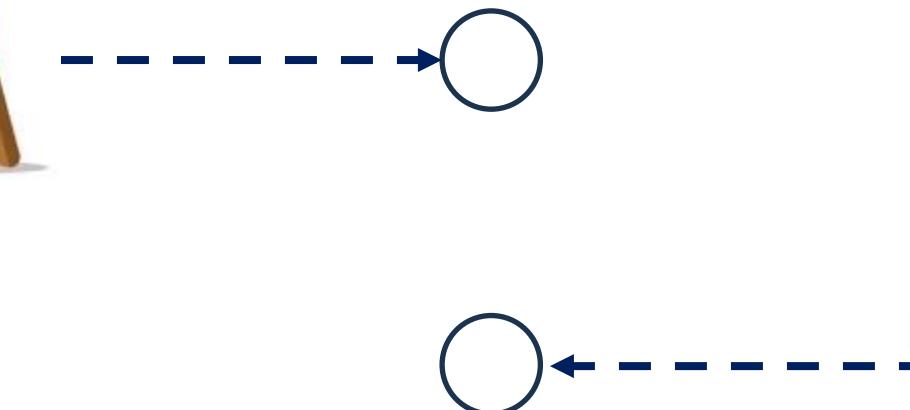
Outcome (indicators and metrics)
Increase in insurance literacy levels (Pre- and post-assessment scores measuring the change in participants' knowledge about insurance concepts)
Changes in insurance behavior (Percentage of participants who report making changes to their insurance coverage or purchasing new policies after the intervention)
Net Promoter Score (NPS) for Educational Initiatives (NPS based on customer responses after intervention)

Impact (indicators and metrics)
Improved community resilience to financial shocks and unexpected events (Percentage change in the reported ability of community members to recover from financial setbacks over time)
Improved overall quality of life within the community (Percentage change of community members of how insurance knowledge has contributed to an improved quality of life over time)

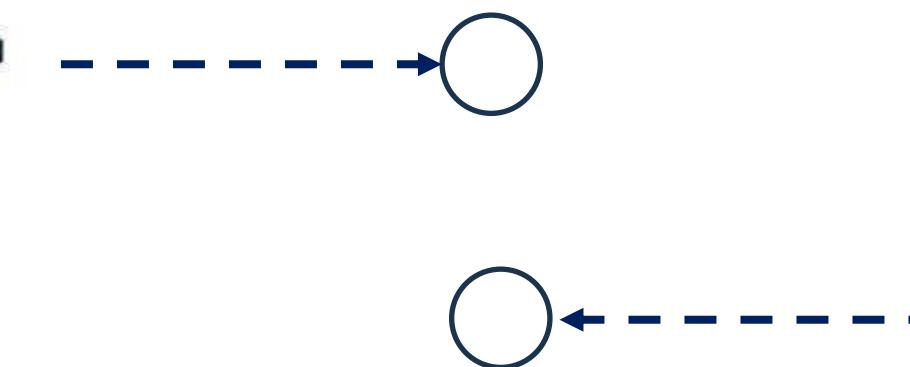
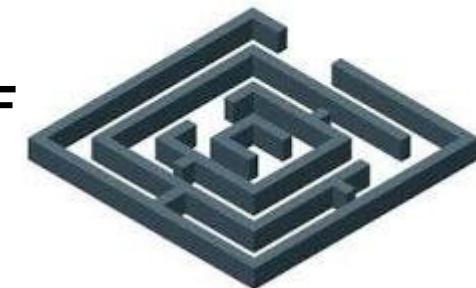
DATA AVAILABILITY



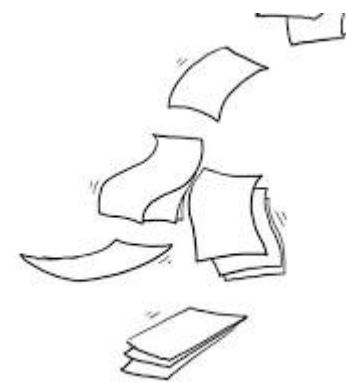
QUALITY OF DATA



COST AND LACK OF KNOWLEDGE



SPREAD INFORMATION



ACCOUNTABILITY & DATA ASSURANCE

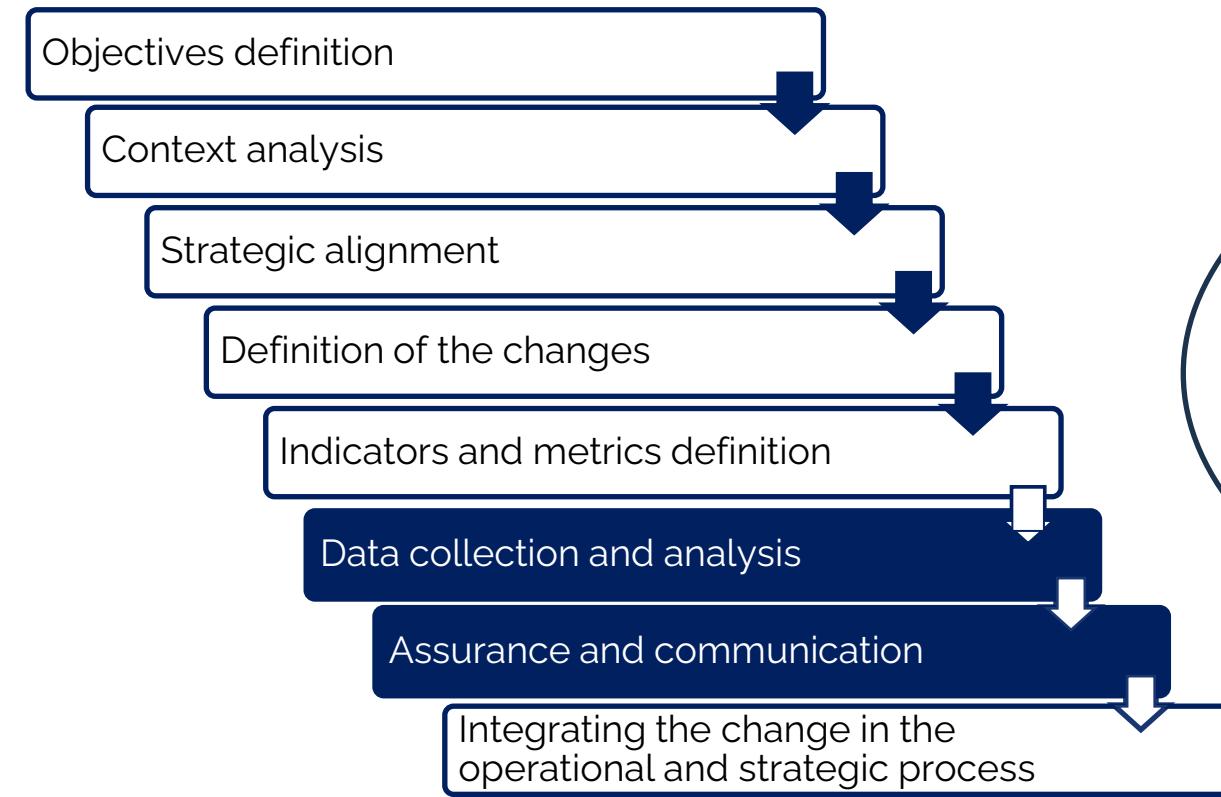


HOW TO REALLY USE DATA AND RESULTS



Instruments for digitalization and automation

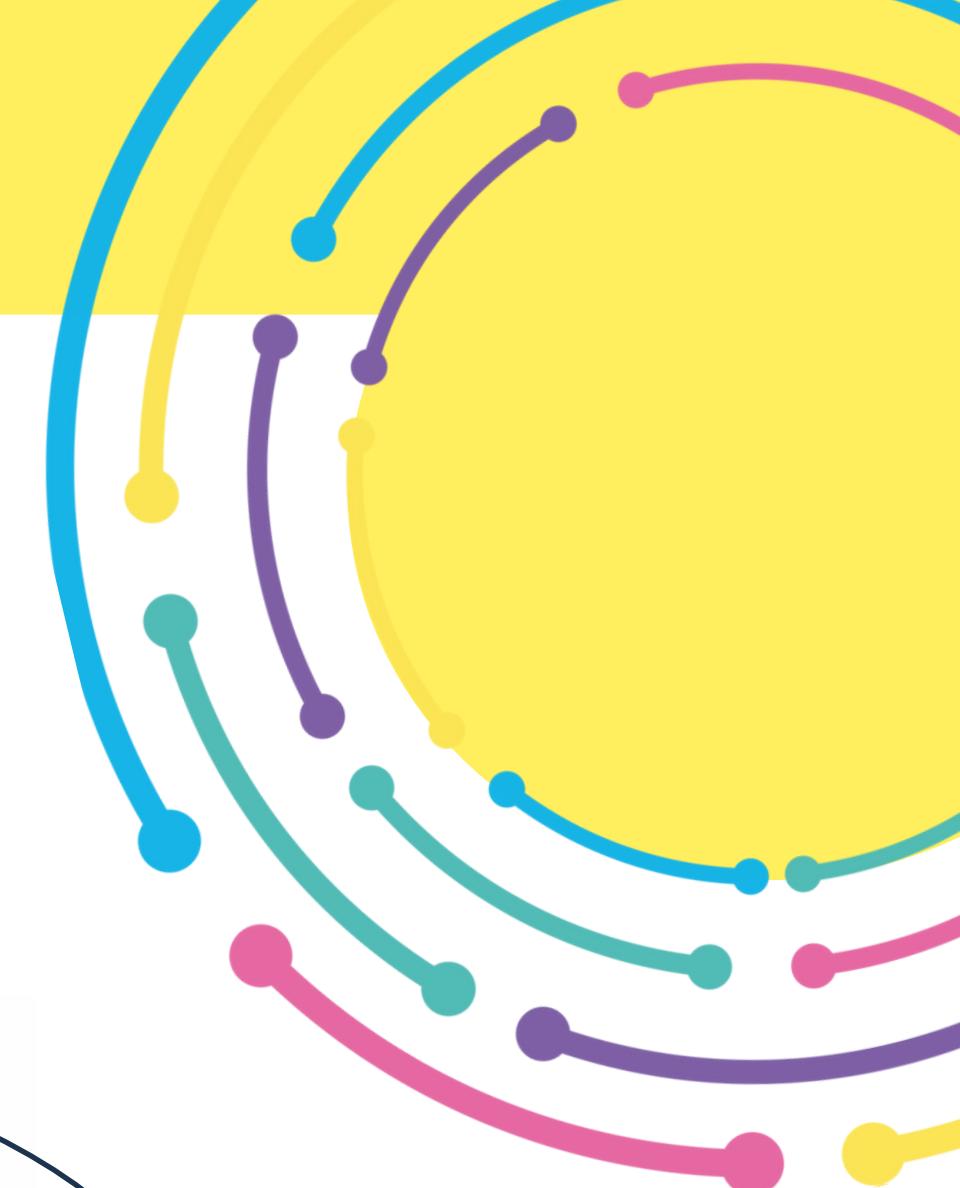
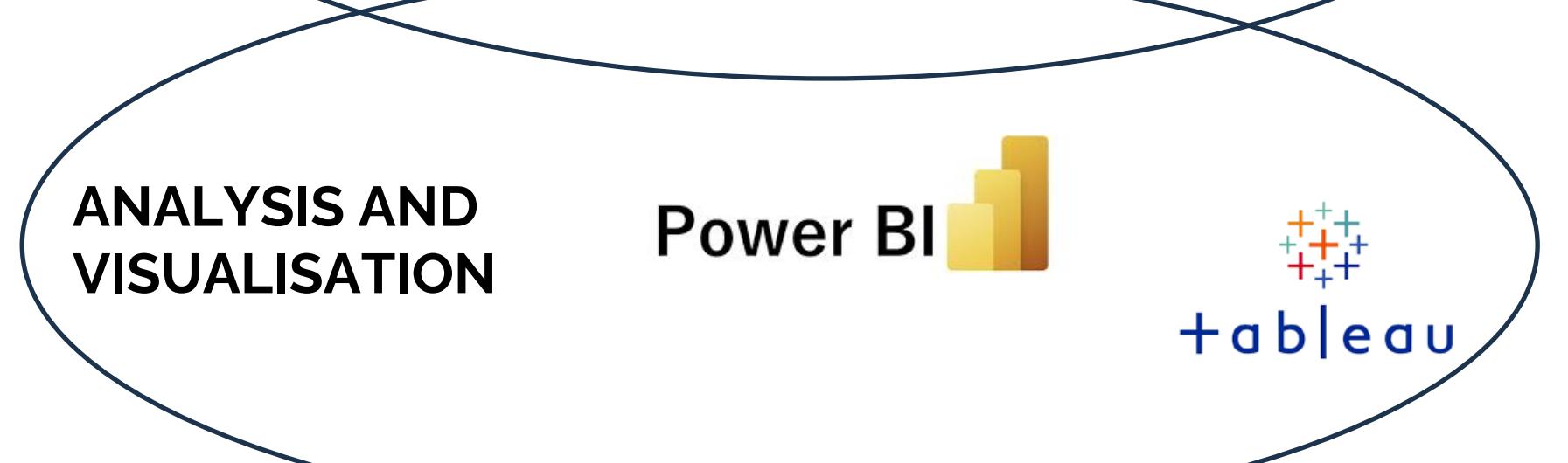
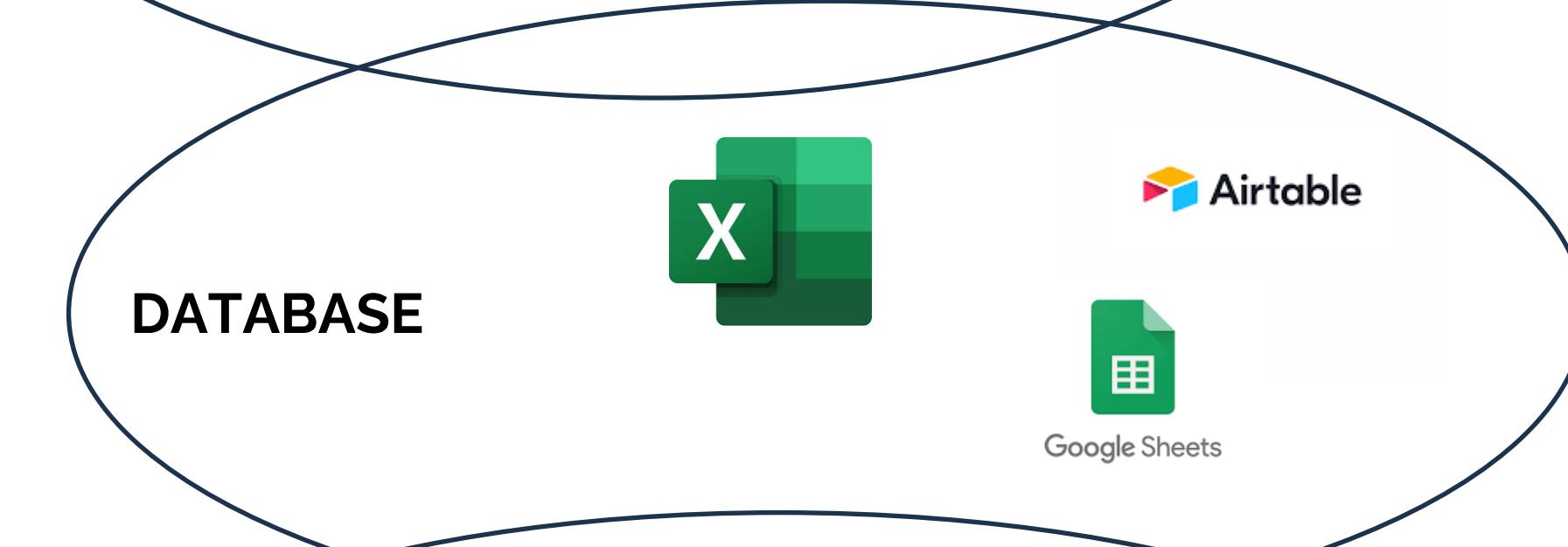
Digitalisation – Traditional instruments

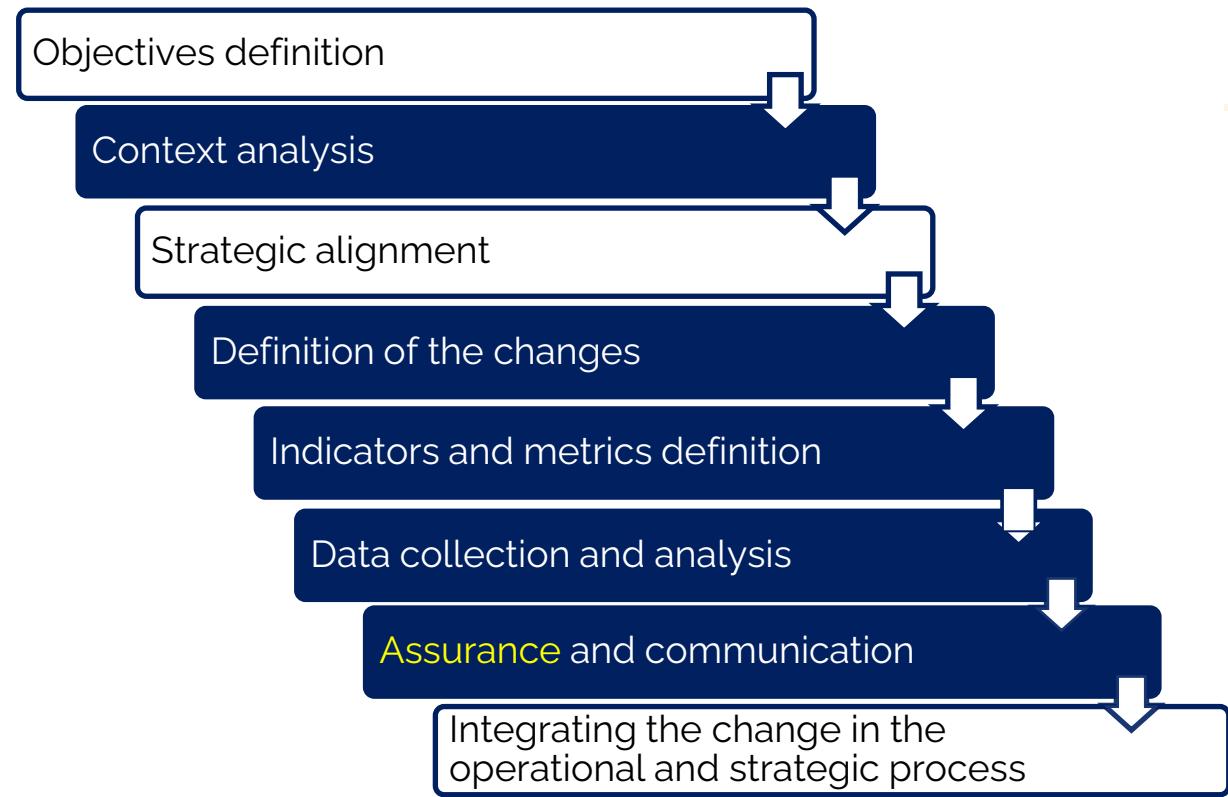


Cost effective
High Flexibility
Low Barrier to Entry



Data Silos
Manual Error
Limited Qualitative Analysis





Speed & Scalability

Versatility

Integration with traditional tool



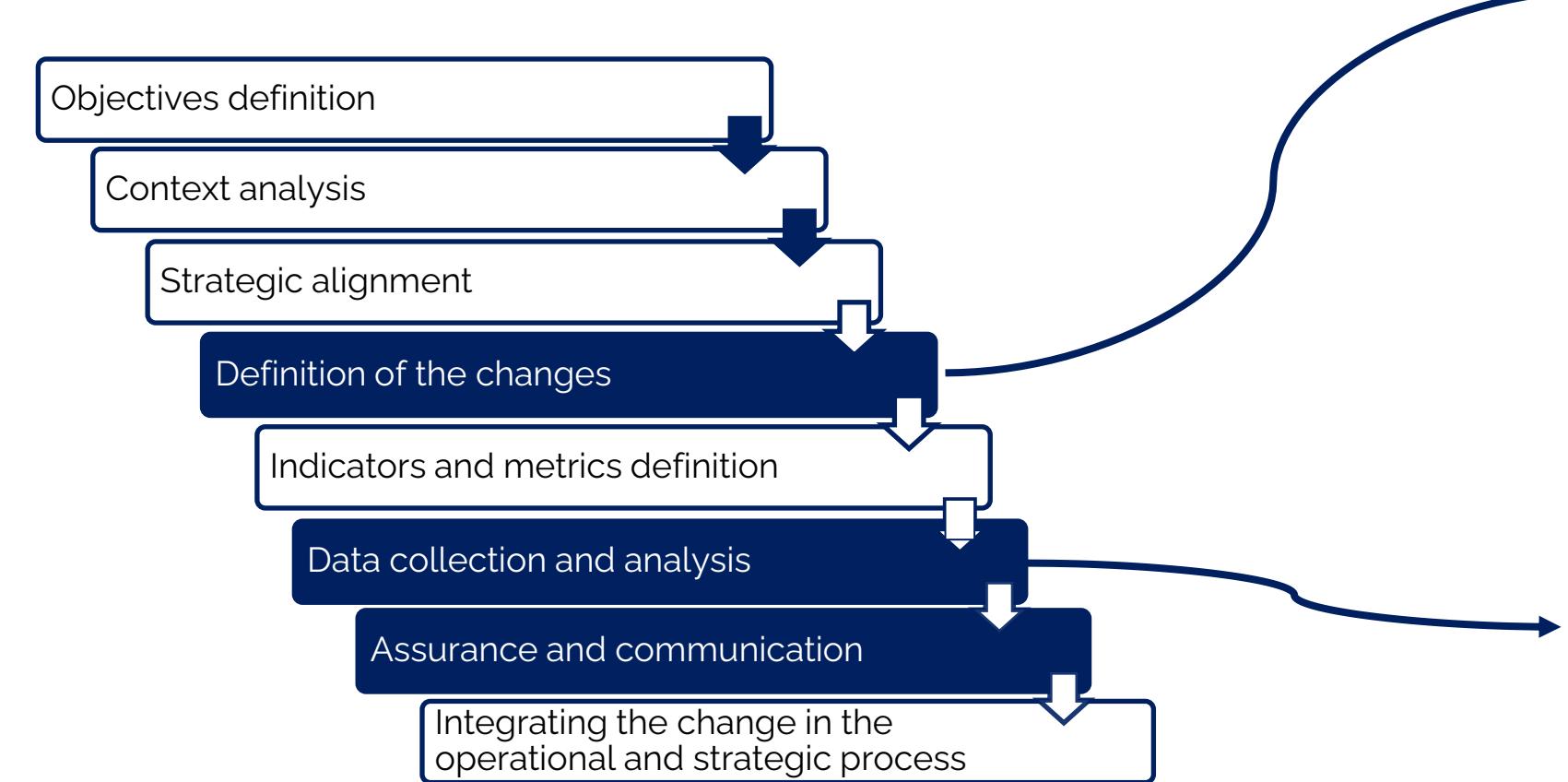
Hallucinations

Privacy & Ethics

AI doesn't <>know<> your community

Prompt dependence

Optimizing specific stages



Sopact Copilot for Impact and Sustainability



Tools typically designed for general use rather than social impact measurement.



worldfavor



Sustainability & ESG Strategic Management Platforms



Impact Platform



UPRIGHT PROJECT

Net Impact Quantification and rating



Data Centralization
Methodological Robustness
Automated Reporting



Standardization vs. Flexibility (Customization Costs)
Process Integration
Learning curve

Social Impact: Digitalisation and AI Integration

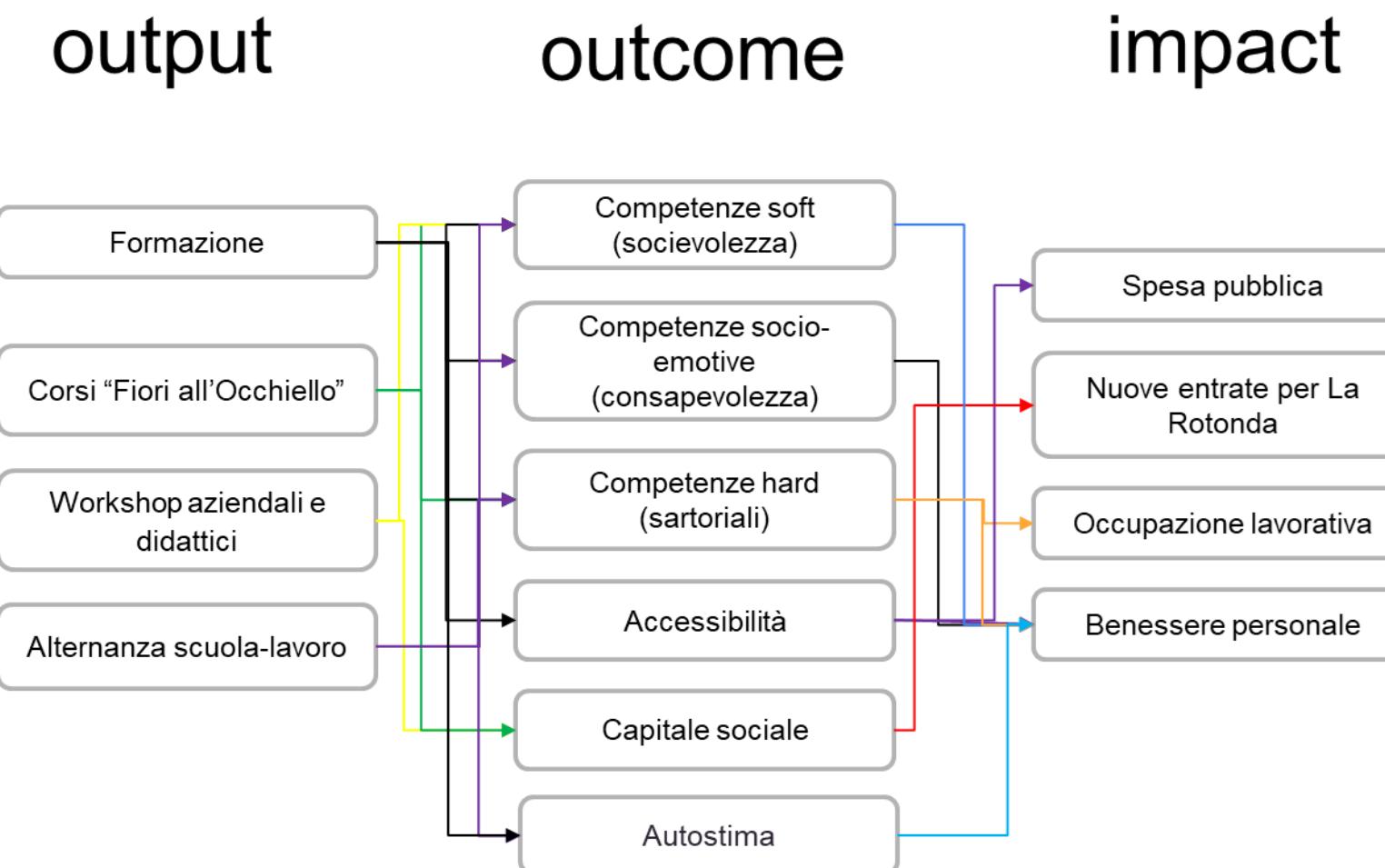
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Case study

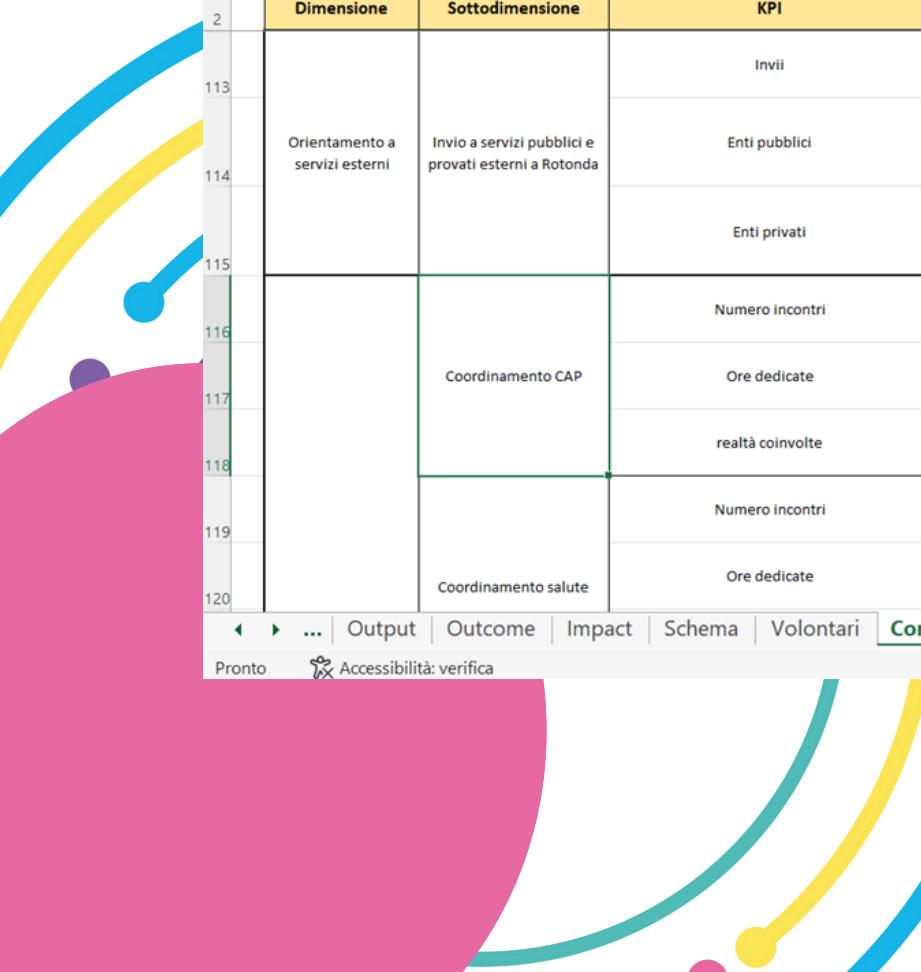
From single project measurement to Ad hoc platform for data collection and analysis



It is always important to start with a **structured mapping** from the activities to the changes you want to generate, divided into different areas of analysis (e.g. sectors in which you operate, types of beneficiaries, etc).



From single project measurement to Ad hoc platform for data collection and analysis



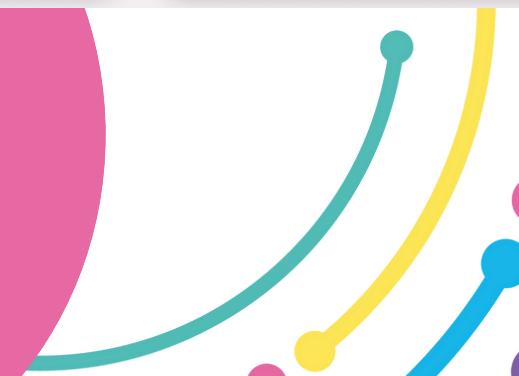
OUTPUT							
Dimensione	Sottodimensione	KPI	Metrica	Info dato	Strumento	Matodologia misura	Note
Orientamento a servizi esterni	Invio a servizi pubblici e provati esterni a Rotonda	Invii	n° invii	Numero di invii fatti nell'attività "Invio a servizi esterni" dell'area Condividi	Scheda profilazione attività	Somma invii con queste caratteristiche	
		Enti pubblici	n° enti pubblici	Numero di realtà pubbliche coinvolte nell'attività "Invio a servizi esterni" dell'area Condividi	Scheda profilazione attività	Somma realtà pubbliche coinvolte con queste caratteristiche	
		Enti privati	n° enti privati	Numero di realtà private coinvolte nell'attività "Invio a servizi esterni" dell'area Condividi	Scheda profilazione attività	Somma realtà private coinvolte con queste caratteristiche	
	Coordinamento CAP	Numero incontri	n° incontri avvenuti	Numero di incontri fatti nell'attività "Coordinamento CAP" dell'area Condividi	Scheda profilazione attività	Somma incontri con queste caratteristiche	
		Ore dedicate	n° ore dedicate	Numero di ore dedicate nell'attività "Coordinamento CAP" dell'area Condividi	Scheda profilazione attività	Somma ore con queste caratteristiche	
		realità coinvolte	n° realtà coinvolte	Numero di realtà coinvolte nell'attività "Coordinamento CAP" dell'area Condividi	Scheda profilazione attività	Somma realtà coinvolte con queste caratteristiche	
	Coordinamento salute	Numero incontri	n° incontri avvenuti	Numero di incontri fatti nell'attività "Coordinamento salute" dell'area Condividi	Scheda profilazione attività	Somma incontri con queste caratteristiche	
	Ore dedicate	n° ore dedicate		Numero di ore dedicate nell'attività "Coordinamento salute" dell'area Condividi	Scheda profilazione attività	Somma ore con queste caratteristiche	

Structuring a solid framework that can support digitisation:

- Definition of indicators
- Metrics for calculation
- Data collection logic: desk analysis, surveys, etc.
- Data collection tools (e.g. surveys questions)
- Systematisation of collection tools for different beneficiaries



From single project measurement to Ad hoc platform for data collection and analysis



The final tool must meet the needs of the organisation:

- Each beneficiary must only answer questions evaluating the activities in which they participated and the outcomes/impacts associated with them.
- Each operator must answer questions relating to the beneficiaries they have followed.
- The system must allow data to be viewed by area, with a focus on internal efficiency.
- With a focus on strategic decisions and communication, the system must allow aggregate data to be viewed according to the impact of the entire organisation.
- Ensure intuitive and usable graphics to support internal decisions and external communication.



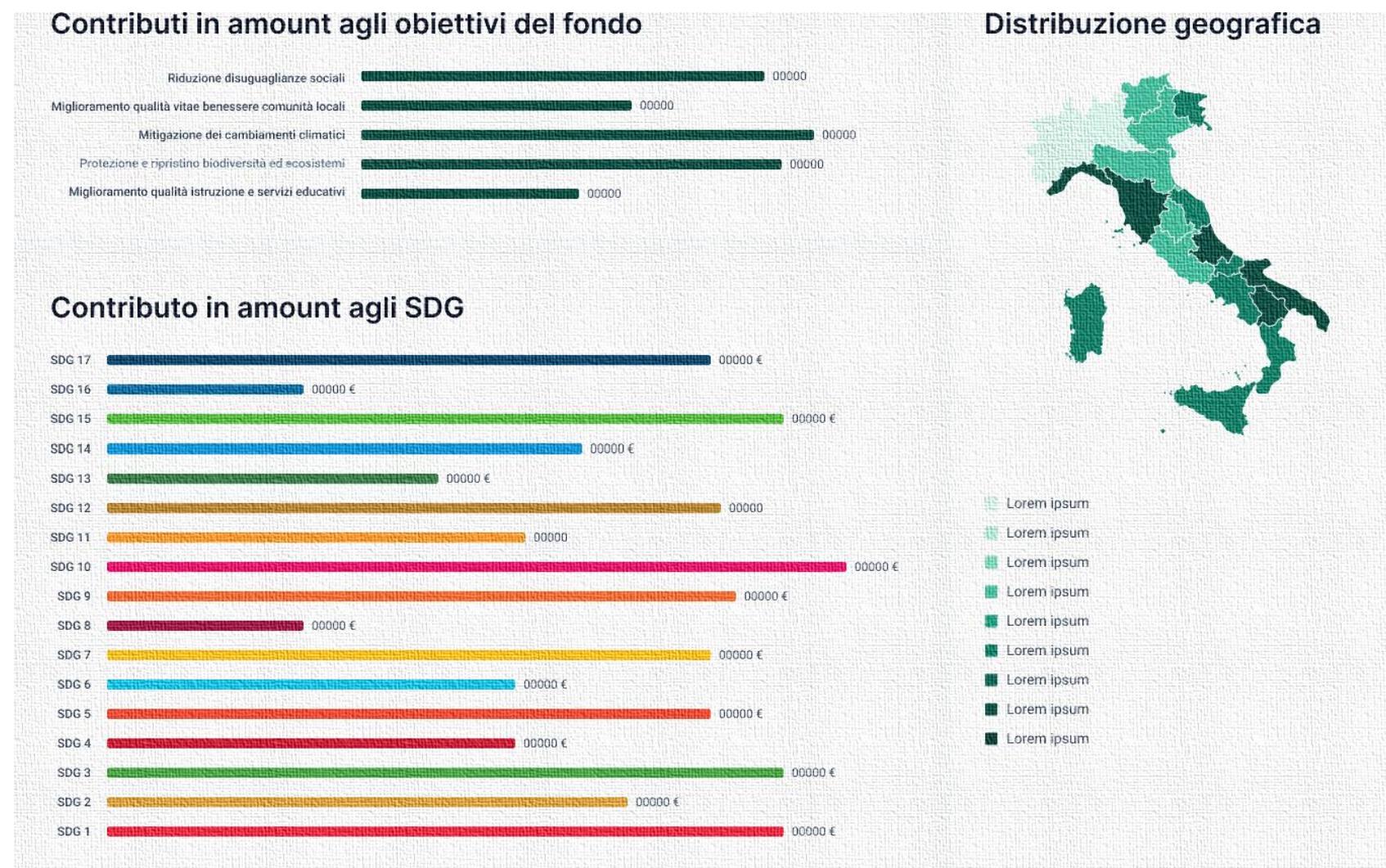


Hub for the Investor

The platform supports the management of the impact generated by investments by understanding their contribution to SDGs and the investor's objectives

Human led-approach

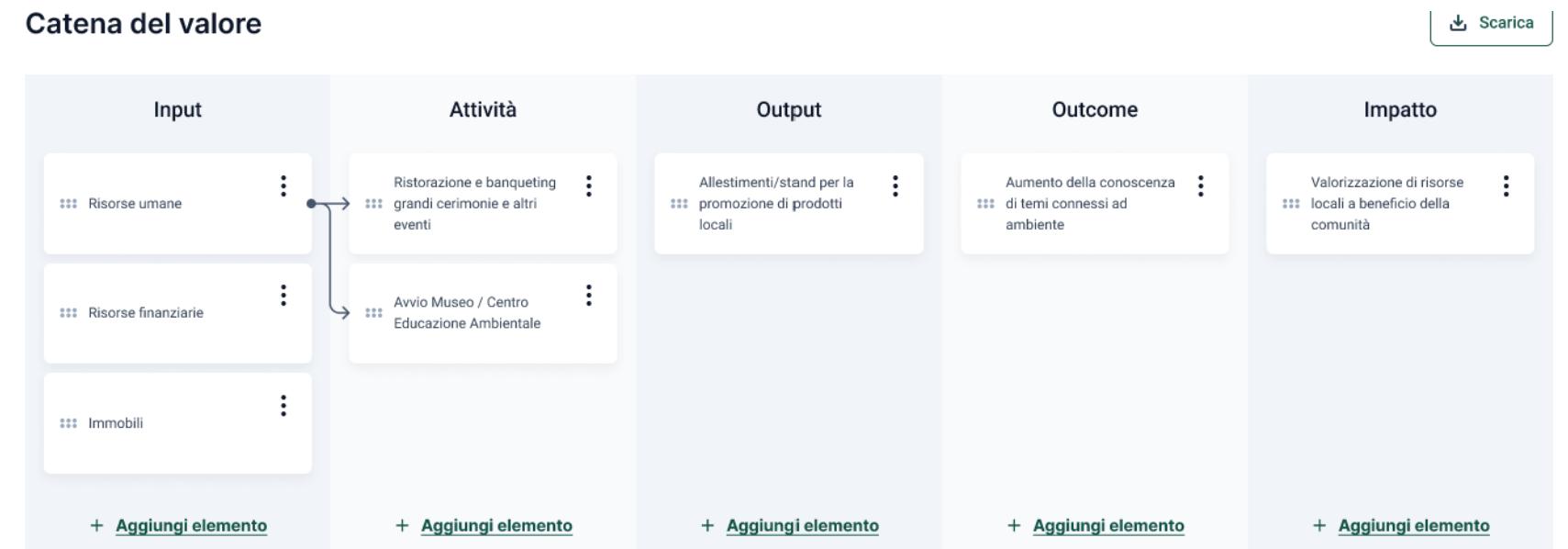
The entire framework is built on a traditional, human-led approach. Every logic link and metric selection is validated manually by impact experts.





Enabling Collaboration

The platform enables the collaboration with the investee in stakeholder analysis, the definition of the impact value chain



KPI and Target Monitoring

The platform enables the joint identification and tracking of KPIs, ensuring all parties are aligned on performance expectations.

- KPI catena del valore

KPI outcome	Metrica/formula di calcolo KPI	Baseline
Nº di persone escluse o a rischio di esclusione sociale che migliorano le loro condizioni materiali di vita	Nº mesi Σ tempi/ beneficiari	3
Nº di persone escluse o a rischio di esclusione sociale che migliorano le loro condizioni materiali di vita	Nº mesi Σ tempi/ beneficiari	3
KPI output	Metrica/formula di calcolo KPI	Baseline
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[Aggiungi target](#)

Assurance and Accountability

Every KPI reported can be linked back to specific evidence, ensuring the data is verifiable and traceable

Automated calculation of synthetic impact indicator

Automated Speech-to-Text (Transcoding):

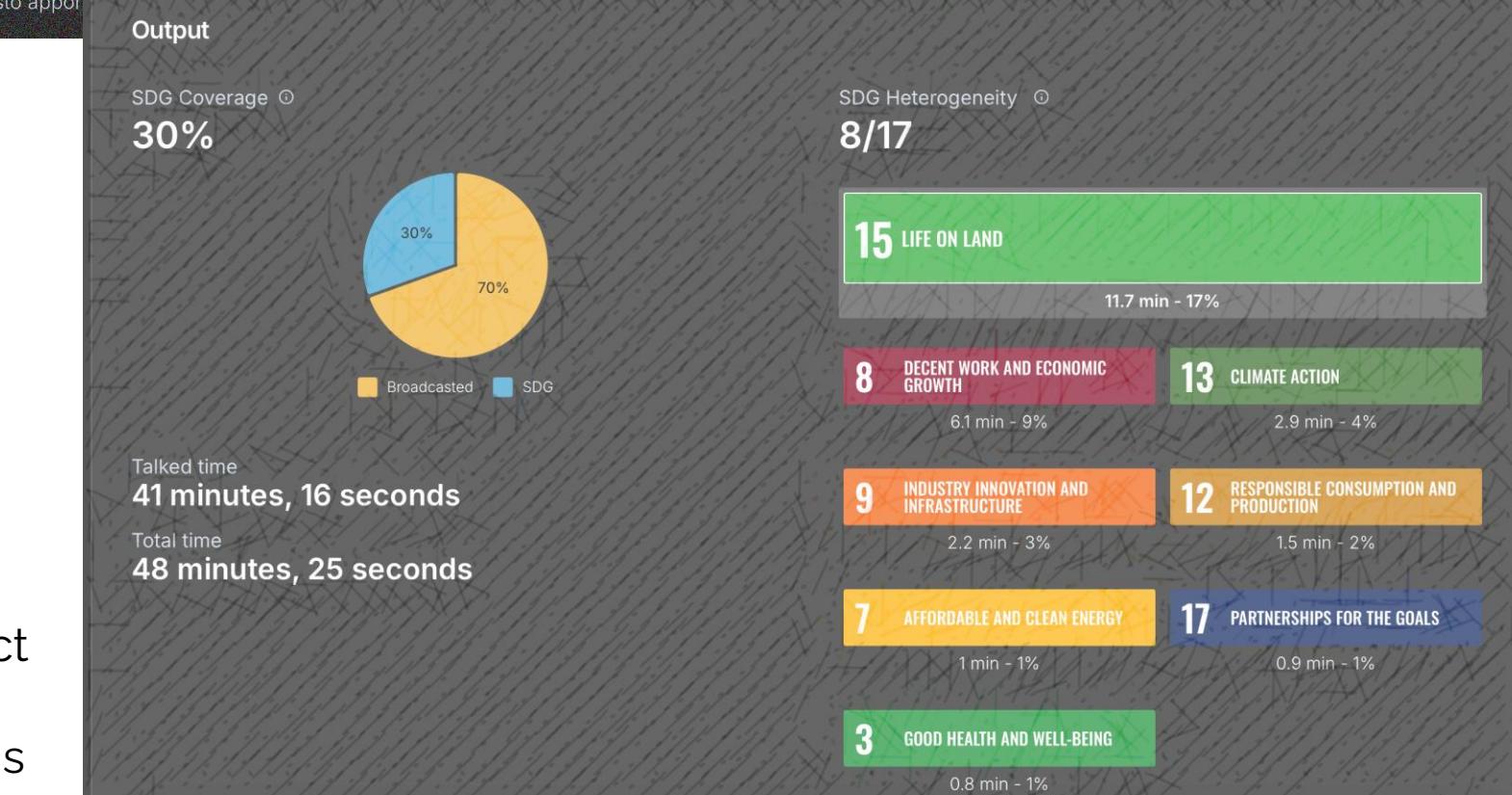
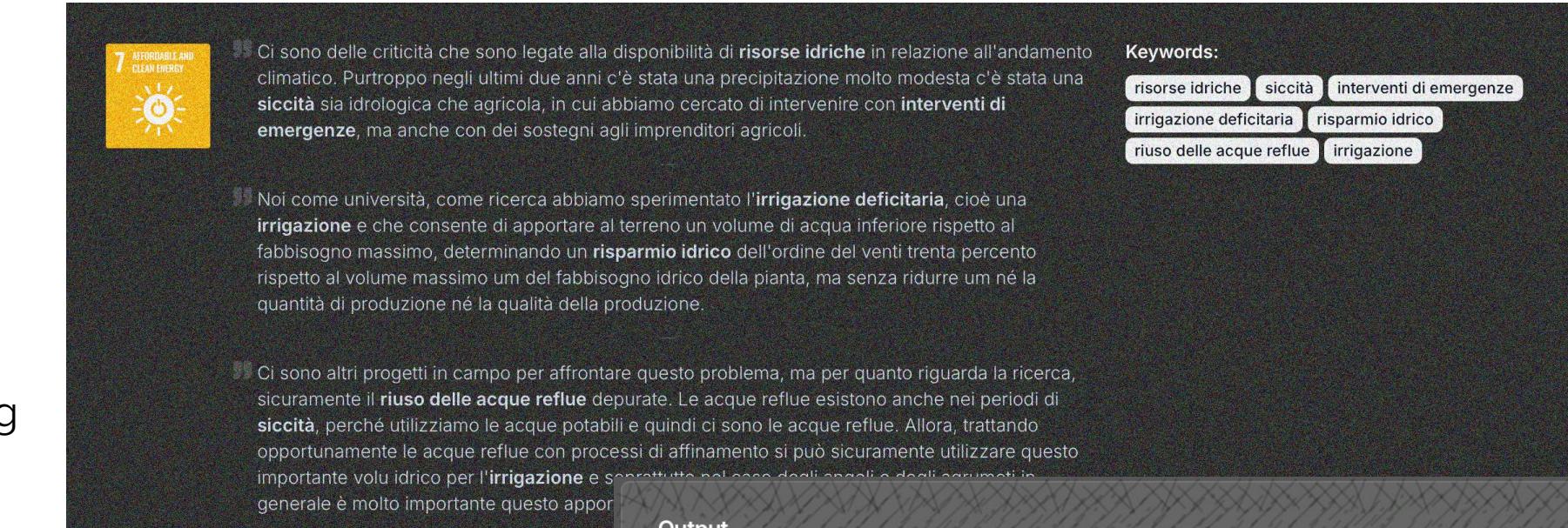
Utilizing AI engines to instantly convert hundreds of hours of video/audio into searchable text, saving months of manual transcription

AI-Powered Theme Identification
Identification of themes related to sustainable development challenges using machine learning tools



Sentiment & Emotion Analysis
AI-powered Natural Language Processing (NLP) scans the transcripts to detect emotional tones (e.g., confidence, frustration, gratitude) and quantify qualitative "vibes."

Automated analysis and visualisation
Automated calculation of synthetic impact indicators [non-monetary]
Visual representation through dashboards



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Internal development of AI tool



EXAMPLE: Restarting from the Territory. Integrated Pathways to Prevent Early School Leaving and Address NEET Conditions in the Naples North Metropolitan Area

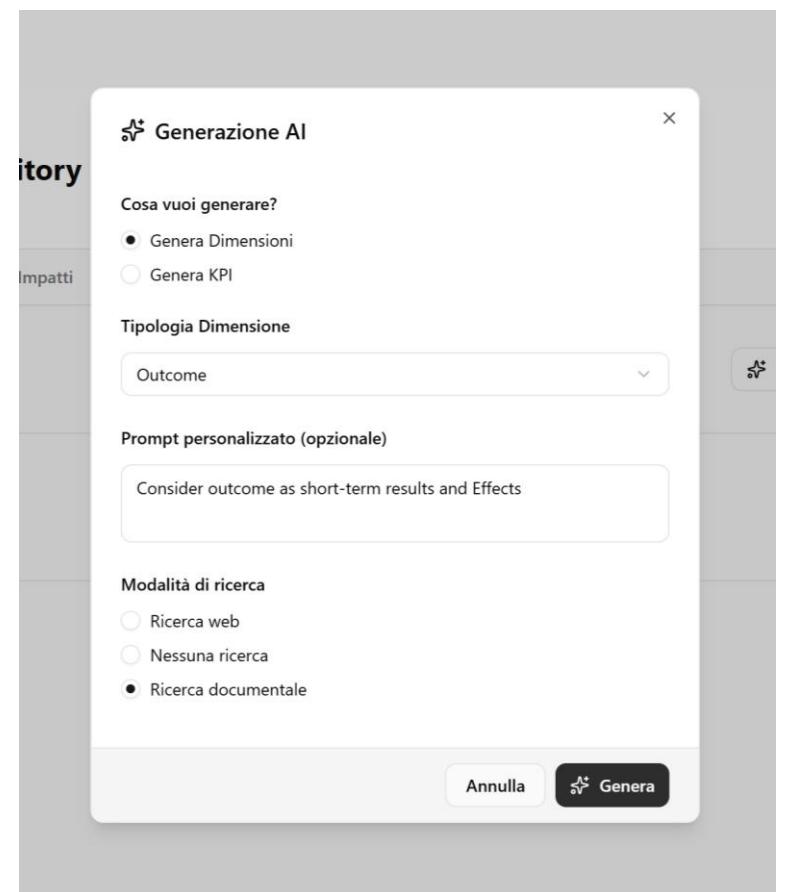
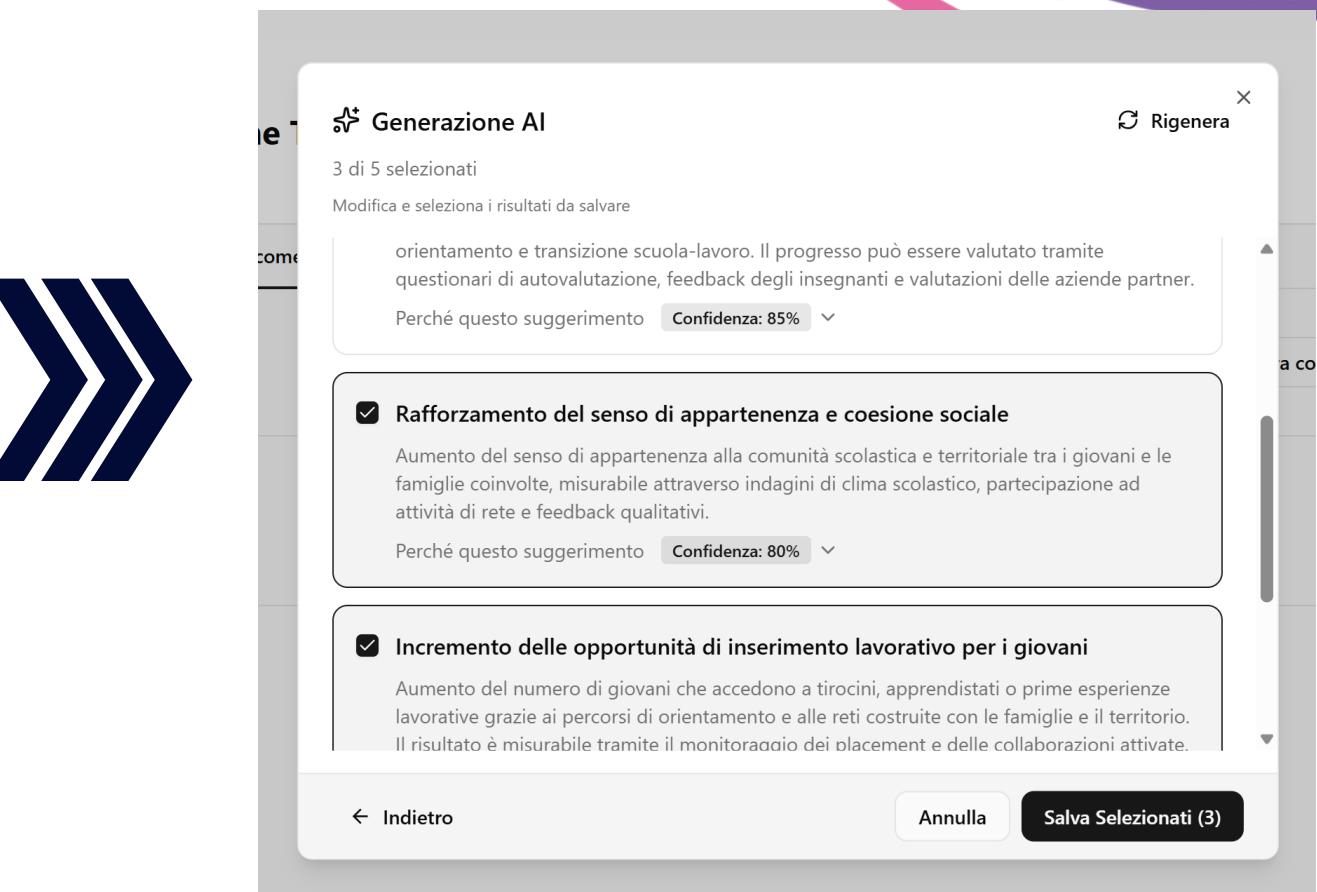
This one-year project addresses early school leaving and NEET conditions in Naples North through integrated educational support, guidance, and territorial coordination. It combines individual case management and ecosystem-level action to generate measurable and evaluable social impact.

INPUT

- ❖ Project description documents
- ❖ Project logical framework
- ❖ Transcripts of in-depth calls



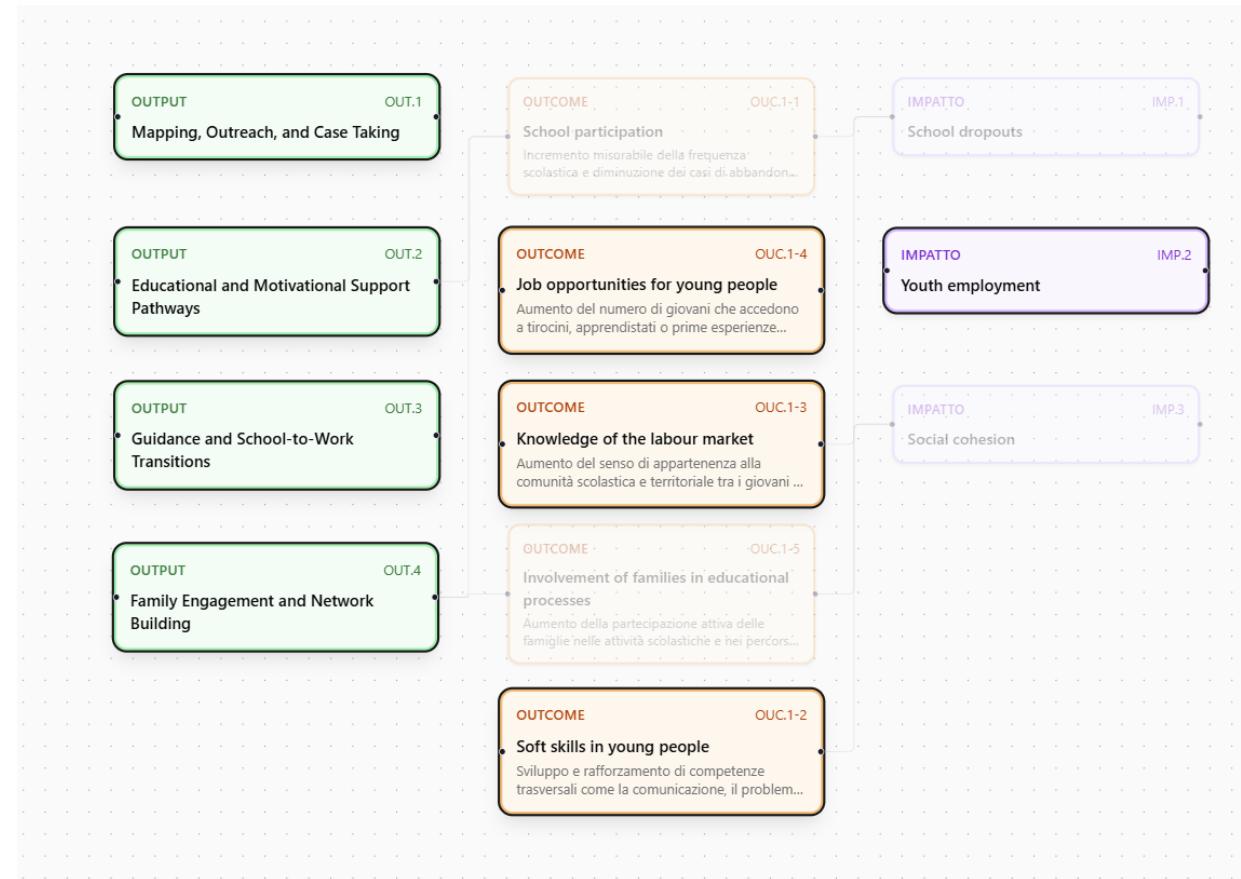
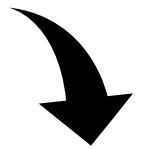
with the client

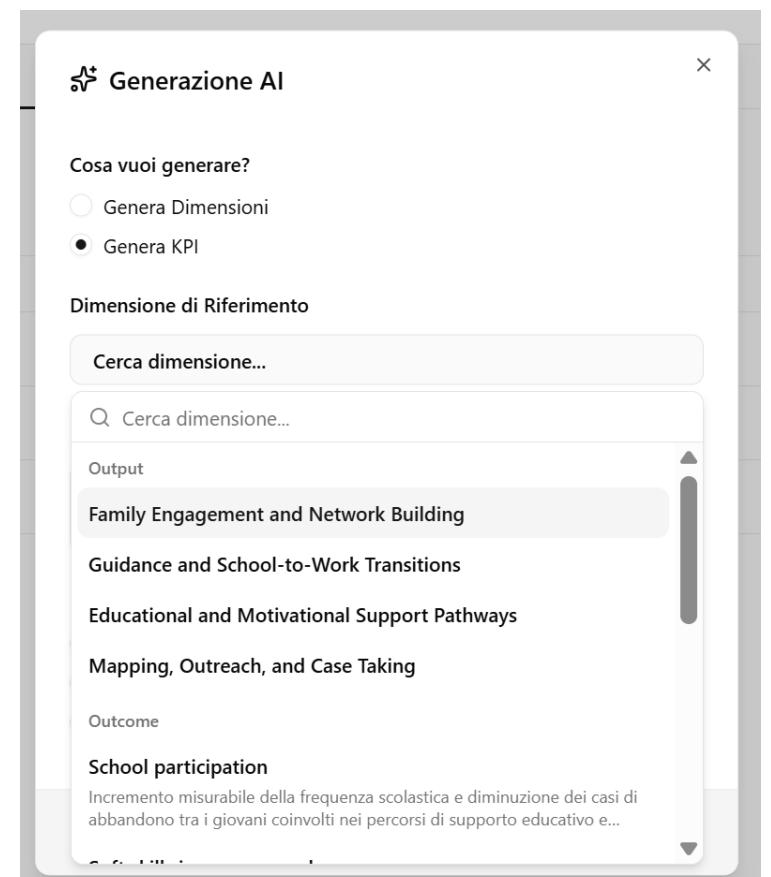
Internal development of AI tool



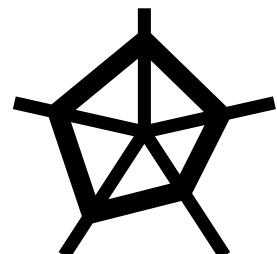
VALUE CHAIN DEFINITION:
Generation of dimensions
and creation of causal links
between them



Generation of KPIs
for each dimension



MONITORING





European Social Fund+ (ESF)
Employment and Social Innovation (EaSI)
strand

A new standard for impact intelligence.

ADALTIM builds the infrastructure for transparent, reliable and comparable impact ratings, delivered through a mission-driven organisation. By combining cutting-edge AI-powered data systems with deep impact measurement expertise, ADALTIM places true societal value at the heart of impact-driven decisions.



Our Added Value

➤ Methodological Innovation

Shifting the focus from scoring compliance (ESG rating model) to outcome-level results, where long-term change truly resides, along the Theory of Change (Impact rating).

➤ Data- and technology-intensive tools.

Enabling benchmarking and comparability of investees' social impact through an AI-powered platform combining impact metrics with area- and sector-specific impact datasets.

➤ Lasting results

Establishing an independent, market-based organisation to deliver the rating services beyond the project's lifetime.

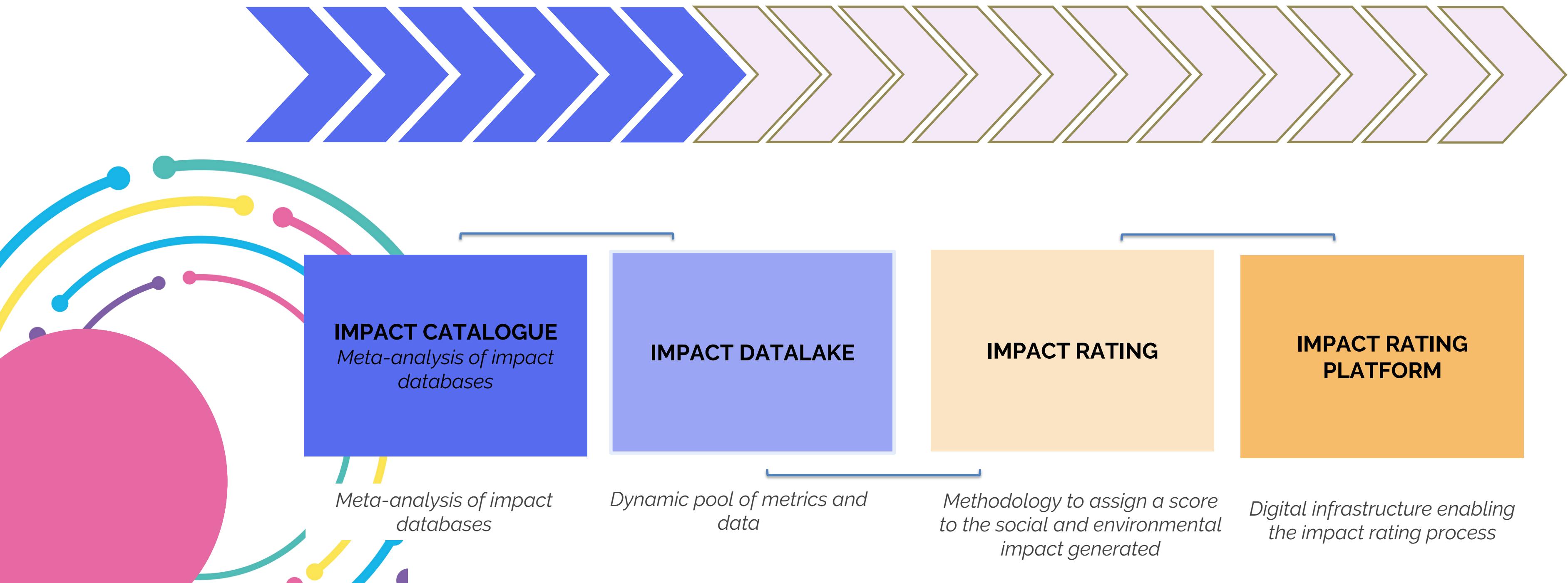
➤ A radical approach to impact

Accountability, transparency and trust embedded in every step of the impact rating process.



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Pathway to the Impact Rating Platform



Thank you!

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