ESG Document Setup & Designed Reporting

Workiva

We simplify complex work.

Workiva ESG Document Setup and Designed Reporting

1. Workiva ESG Solution
2. Value Story
3. Document Implementation

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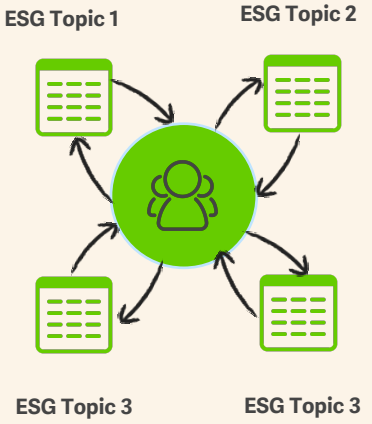
1. Workiva ESG Solution

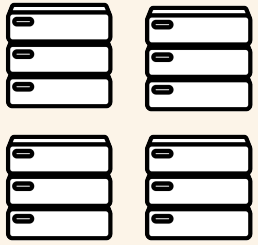
ESG Project Workstreams & Platform Deliverables

1. Data Collection
2. Frameworks / Standards / Surveys
3. Factbook
4. Reporting Outputs

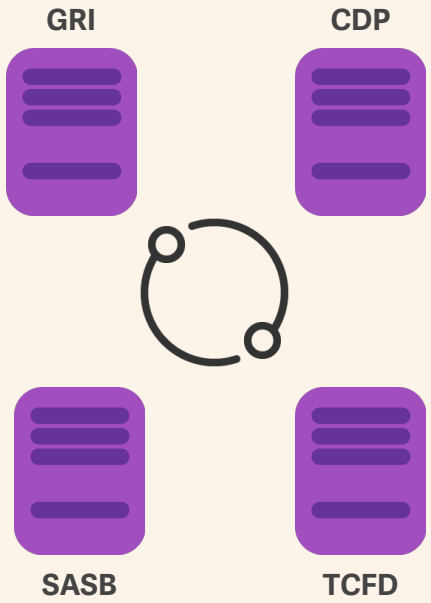
1.1 Unstructured Data



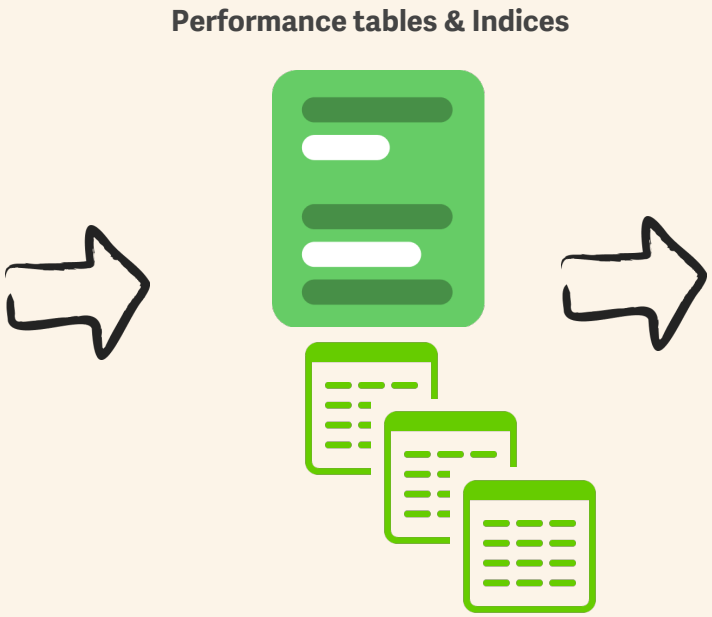
1.2 Source System Connections



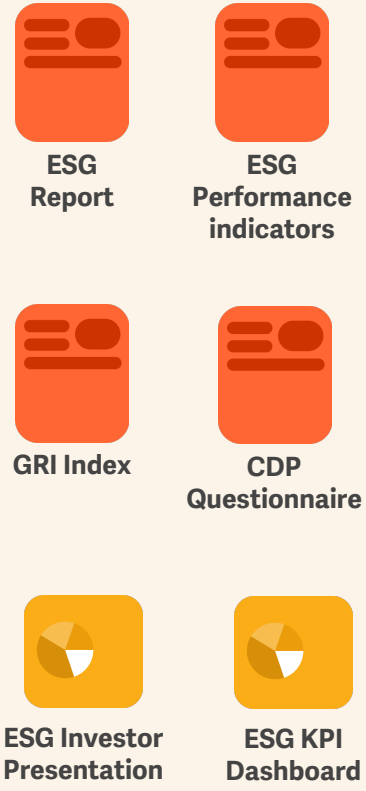
2.1 Framework Content & Data Mapping



3.1 Central Factbook



4.1 Reports



Names of reports. frameworks, questionnaires and standards above are examples and not representative of the scope of the project.

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High Level Implementation Method

Client Current State

Unstructured data sources

- Email
- Excel
- Sharepoint

Structured data sources

- What structured data sources will be used? (e.g. Workday, ADP)

Data providers

- Number of Data Providers
- Consolidated or granular data?

Frameworks / Surveys

- GRI-SASB-TCFD-SDG-CDP
- Others Provided by Client

Reports

- What reports will be part of implementation? (e.g. ESG report, presentations, surveys)

Phases

Phase 1: Align

Establish consistency in expectations according to the statement of work, timelines and objectives.

Phase 2: Discover

Thoroughly understand the current process, requirements, controls and data systems involved.

Phase 3: Design

Develop, recommend, and establish a scalable process that meets the customers needs and is aligned with Workiva best practices.

Phase 4: Build

Replicate and test the designed solution in accordance with the Statement of Work.

Phase 5: Enable

Provide documentation, and training allowing the client ESG team to successfully maintain and iterate off of the delivered solution.

Go-Live

Project hand-off and onboarding services completion.

Project Deliverables

Platform Deliverables

1. Data Collection

- Data collection sheets
- Data collection process

2. Frameworks / Standards / Surveys

- Framework/survey indicators
- Framework/survey mapping

3. Factbook

- Framework indices
- Key data points for reporting

4. Reporting Outputs

- ESG Report

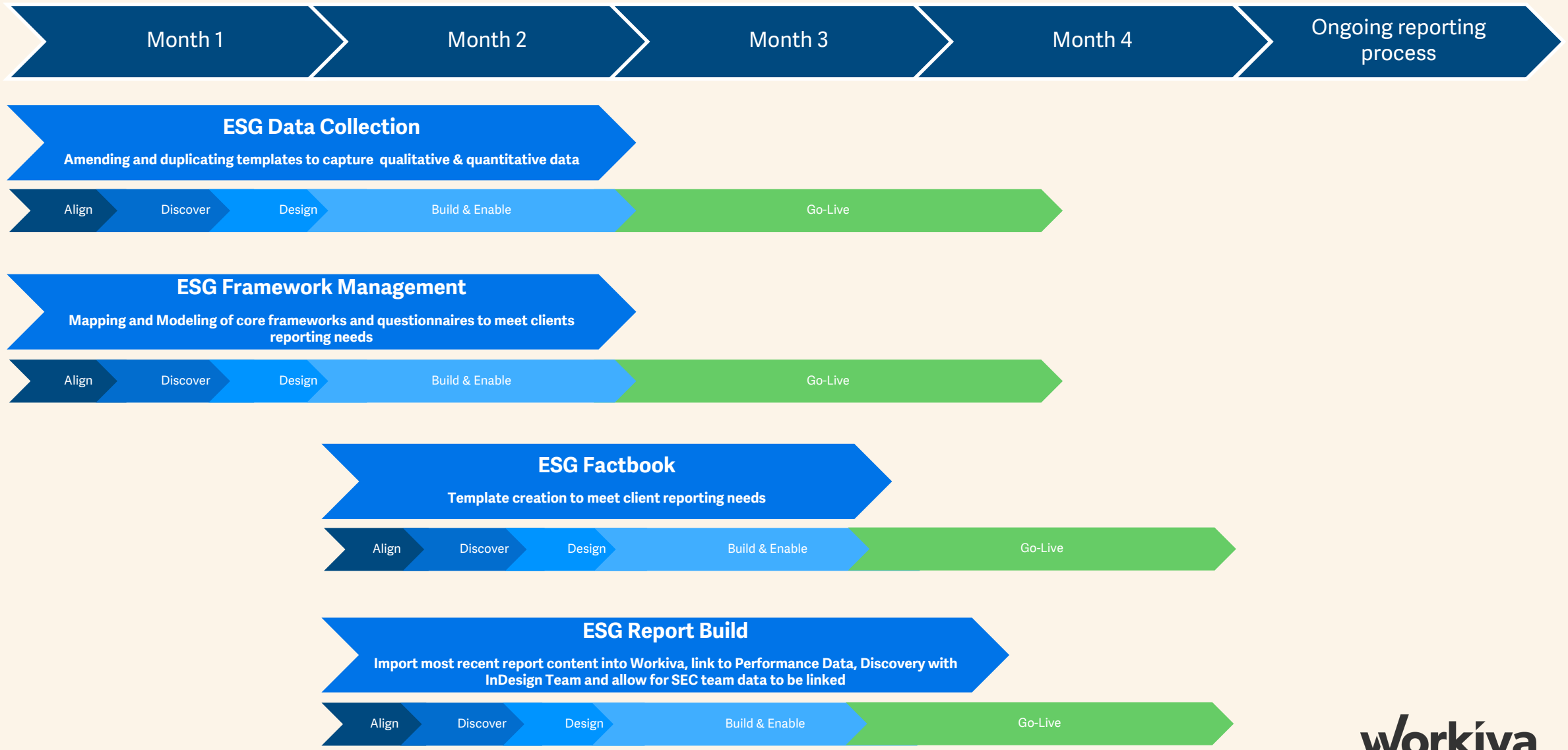
Training & Documentation

- Core ESG team training
- Data provider training
- Data model documentation

Project Management

- Workiva resourcing
- Status updates and meetings

Implementation Timeline



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3. Value Story

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Value Story

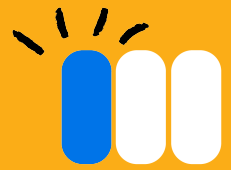
Full Report in Workiva

You can have your full report in Workiva and select which sections you want to export.

Data Assurance

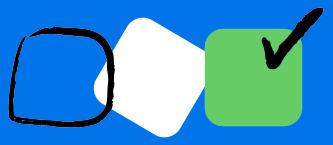
No more copy-paste. The content in Workiva is the same as in InDesign. Linked data will save you time by only updating one source file.

Work Upfront



Create the styles in Workiva as part of the design earlier in the process.

Focus on Design



Content is updated via ICML, so the design team can focus on design, graphics, layout, etc., rather than the numbers being correct.

Future proof

Get ready for upcoming XBRL mandates,

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2. Document Implementation

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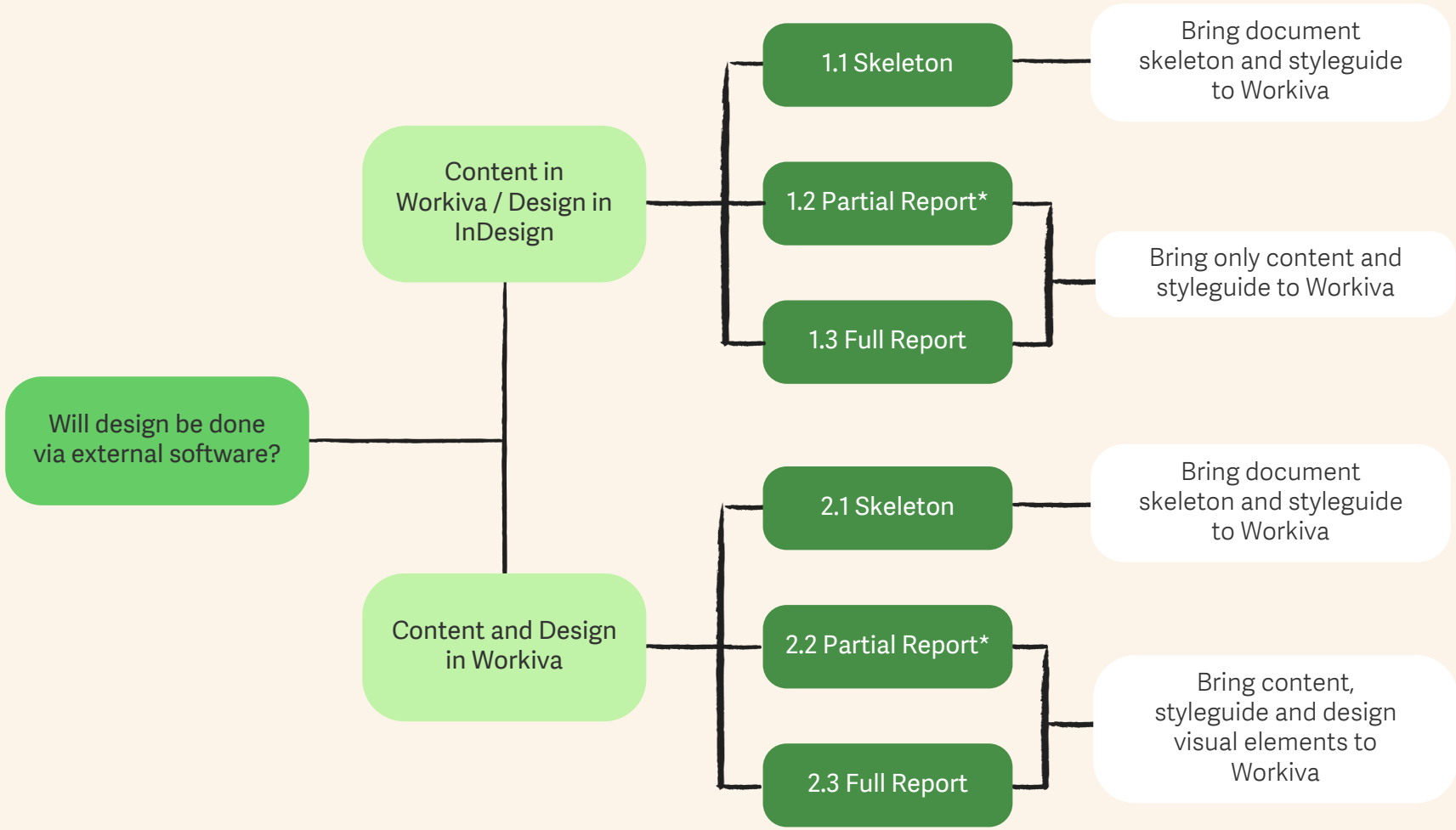
Implementation Options



* Setup of selected sections from the report.

** Layout, tables, visual elements, etc. Within Wdesk capabilities.

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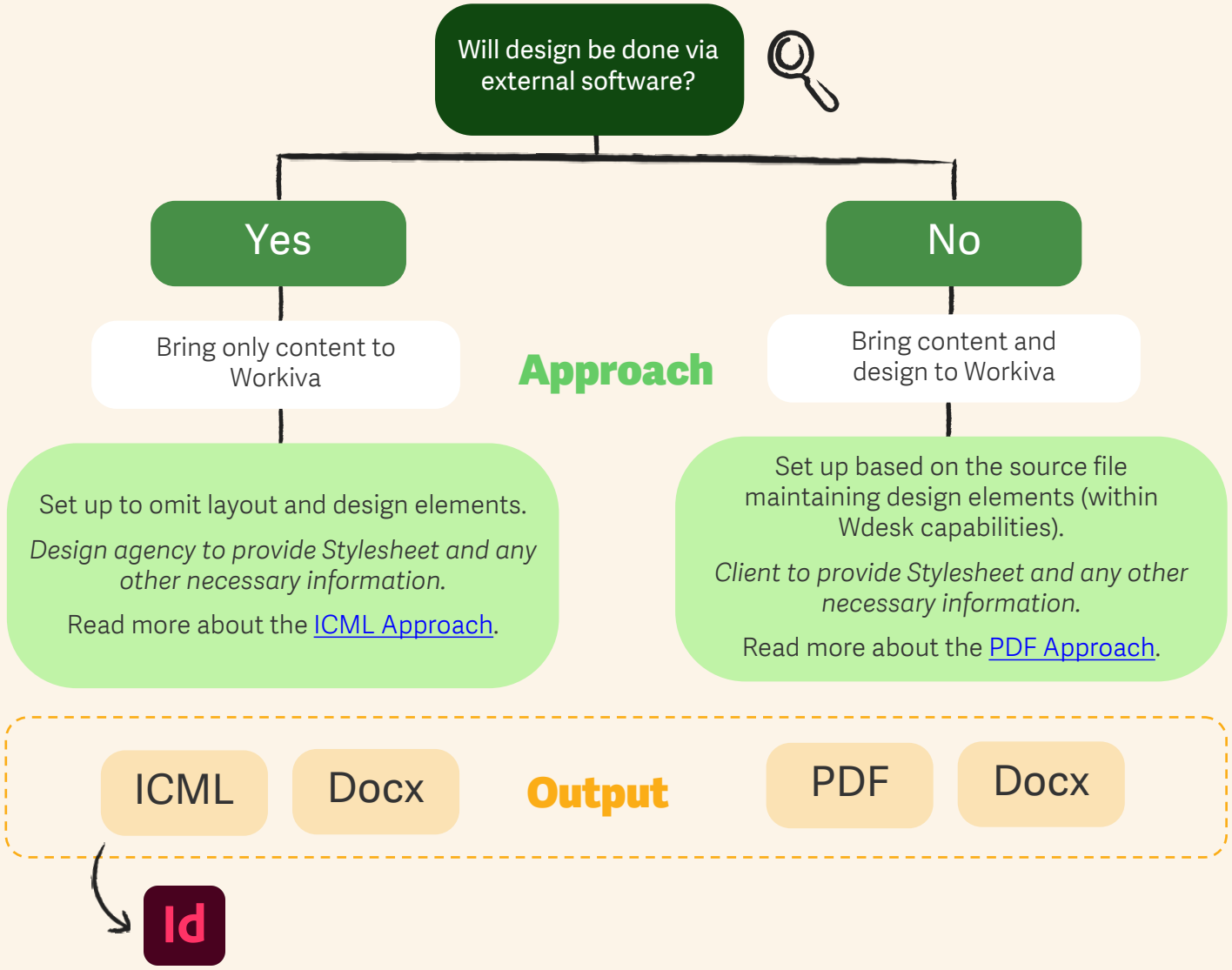
Report Design



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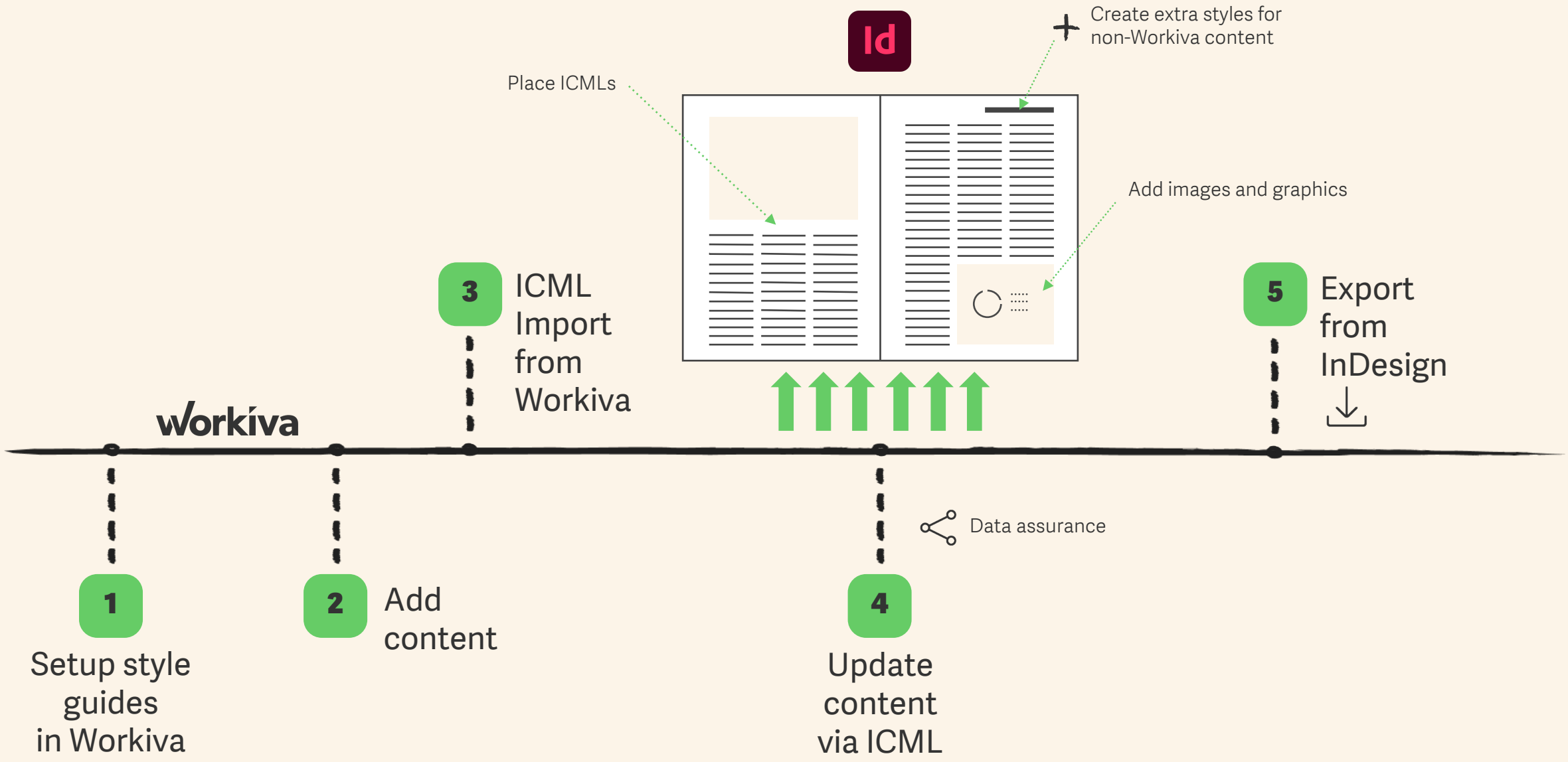
Delivery Steps



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Key Delivery Activities

1 **Setup style guides in Workiva**

Create your styles for text and tables. Each minor difference in style (font, colour, etc.) will result in a new style created.

2 **Add content to your document**

Format the content using the styleguide and link the data.

3 **ICML Import from Workiva**

Place ICML files into InDesign. They can fill one or multiple linked text frames.

The Workiva content will remain linked and not editable, providing data assurance.

You can create extra styles for non-Workiva content such as headings, picture captions, etc., which only appear in your InDesign file or modify the styles created in Workiva.

4 **Update content via ICML**

Export ICMLs from Workiva as many times as you like and update the old ones in InDesign. The version in Workiva is always the current version. Your design will stay in place with all subsequent updated ICMLs.

5 **Export your document from InDesign**

Once there are no more content updates from Workiva, you can break the ICML links.

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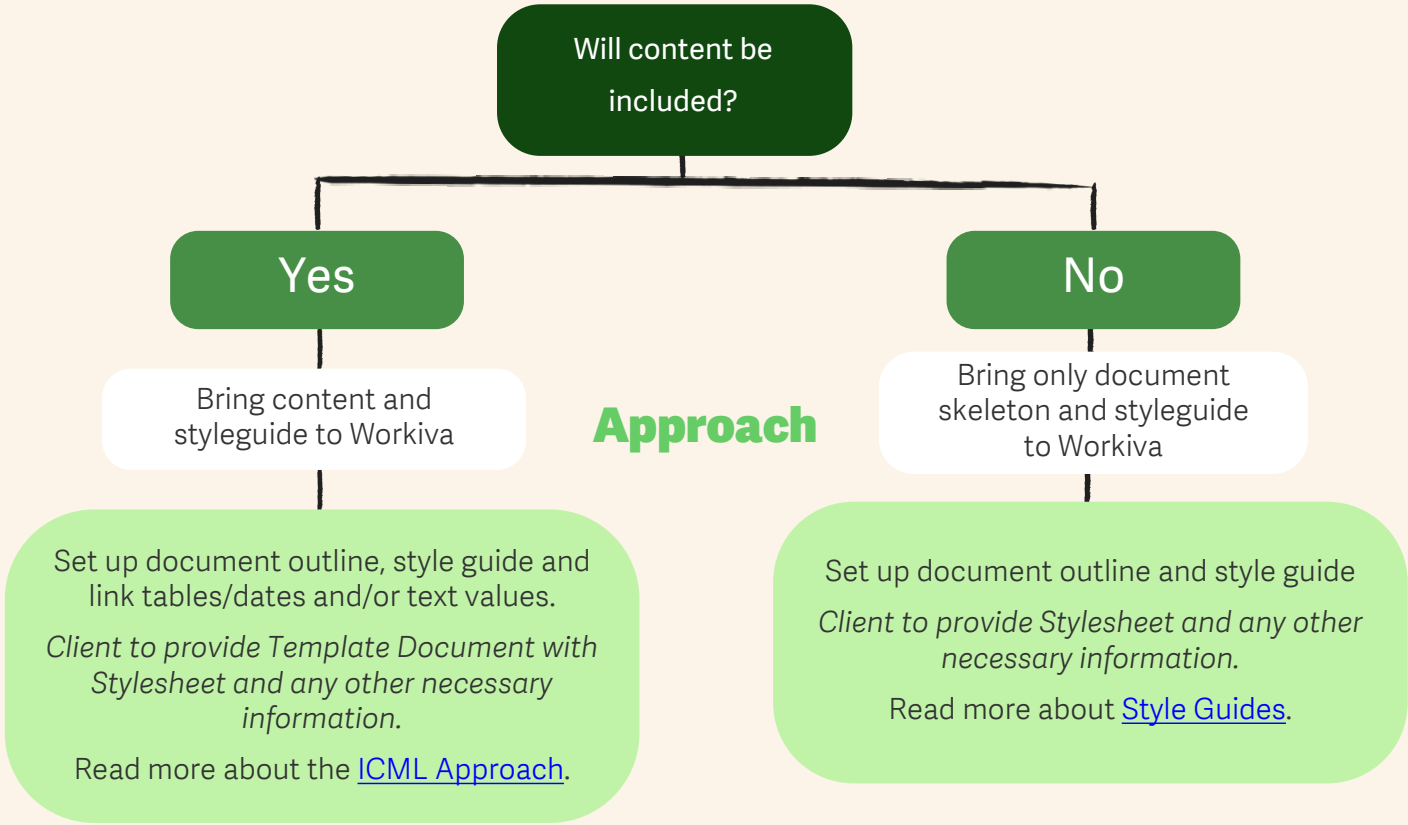
Document Content



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Document Content Scope

	Yes	No
Will Content Change?	☐	☑
Is Content Created in the Design Process?	☐	☑
Can the Content be Created in Wdesk?	☑	☐

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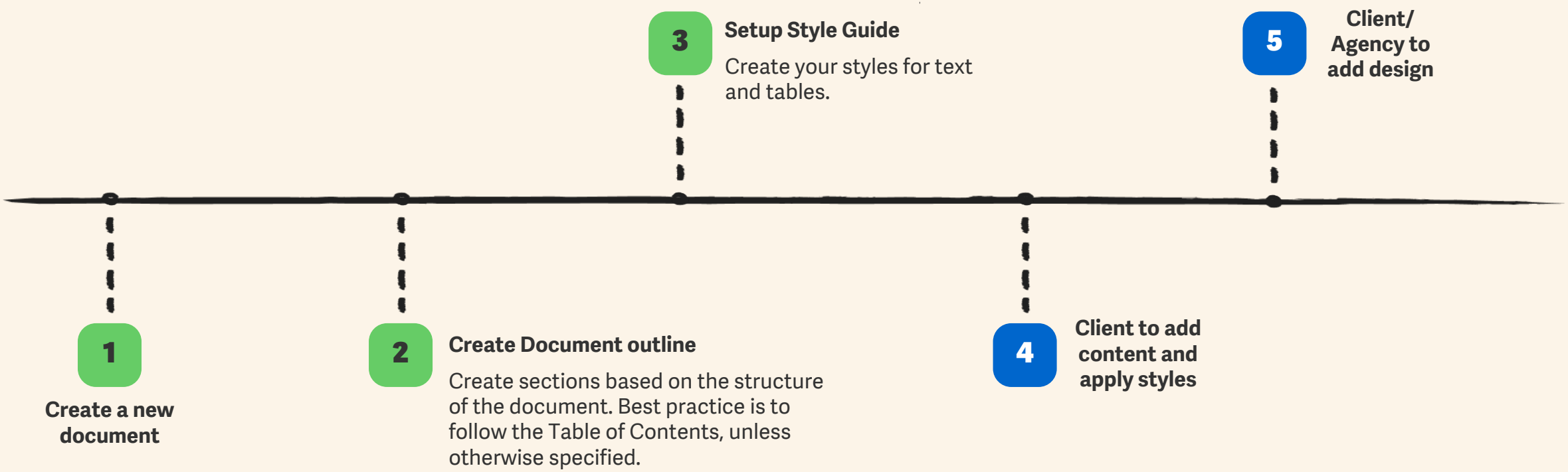
Skeleton Report



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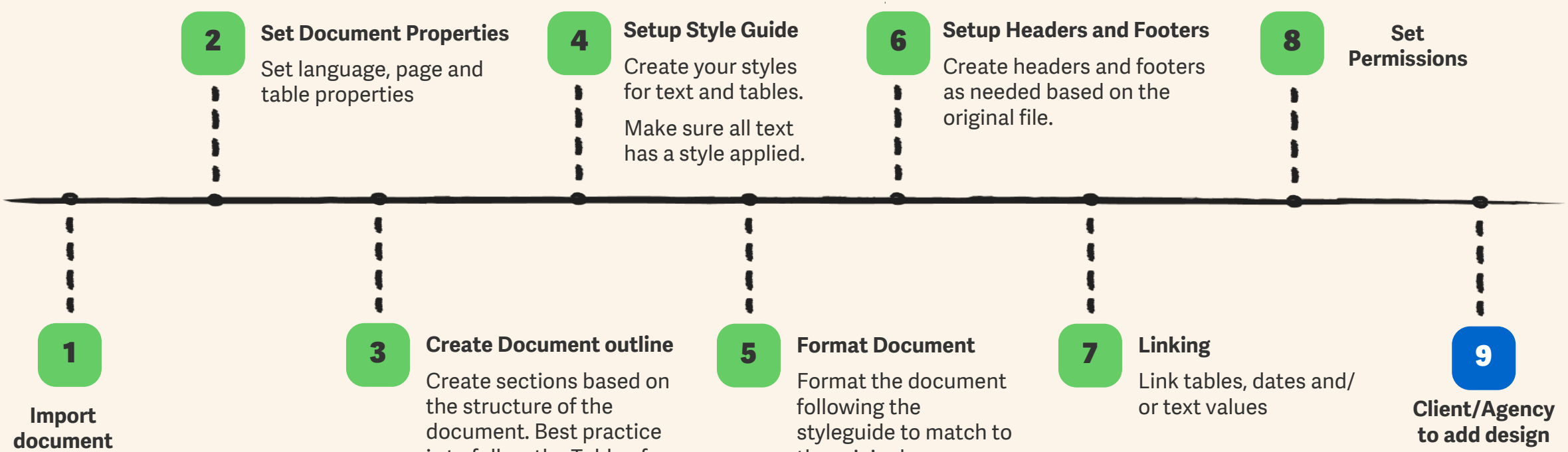
Skeleton Implementation Roles and Responsibilities

	Workiva		Client
	Solutions Architect (SA)	Client Onboarding Specialist (COS)	Core ESG Team
Create a new document	●		
Create document Outline	●		
Setup Style Guide	●		
Add Content			●
Add Design			●

Partial/Full Report (External Design)



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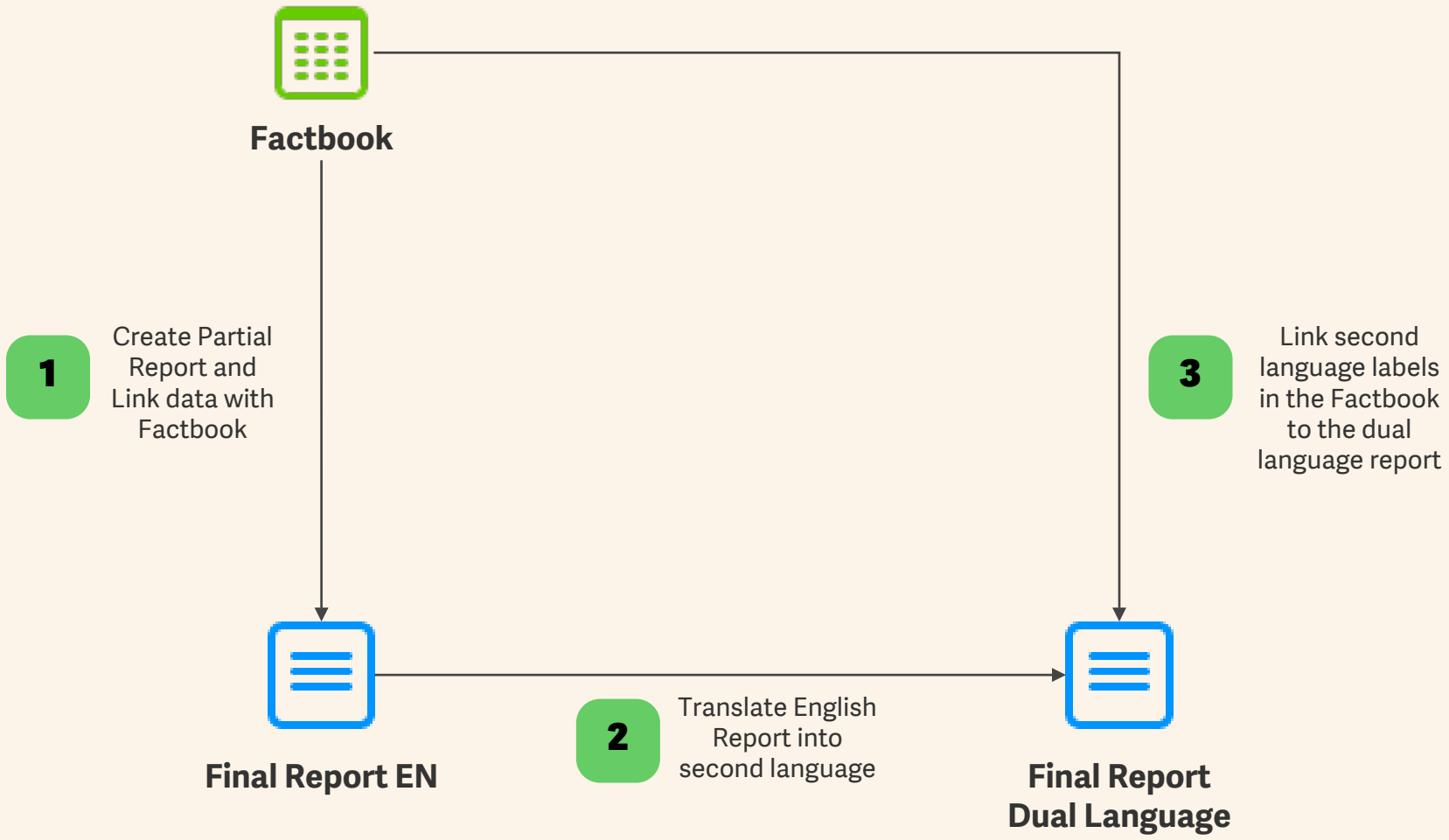
Partial/Full Implementation Roles and Responsibilities (External Design)

	Workiva			Client
	Customer Success Manager (CSM)	Solutions Architect (SA)	Client Onboarding Specialist (COS)	Core ESG Team / Agency
Import document			●	
Set document properties			●	
Create document outline			●	
Setup Style Guide			●	
Format Document			●	
Setup Headers and Footers			●	
Linking		●	●	
Set Permissions	●			
Add Design				●

Dual Language Setup



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