Frameworks Design & Build

As we prepare the process of configuring the ESG based solution in Workiva, we'd like to begin by first providing a high level overview that is helpful to frame to a customer team on what connected ESG solution looks like and the key pieces that go into the solution. Ass highlighted visually, it's anchored across a piece of data collection and spreadsheets, the grouping of the framework standards and surveys in our framework spreadsheets, the factbook to stage data and prepare to share via links to the consumable reporting outputs. We recommend highlighting to a customer team where they can also find more general information that introduces the ESG based solution as well as additional information that would be a part of their workspace functionality that includes the ESG framework and disclosures explorer that highlights a user friendly way of navigating content and data lined to those that are part of the base template solution. As we begin and as we set the stage for customer teams preparing for an implementation, we recommend leveraging a high level onboarding plan view, one that is tailored to the customer and outlines the customer's current state as well as the key project deliverables with visibility across some of the task requirements in each of the phases from align to discover designing building the solution, enabling the customer team and ultimately going live into a full production environment. We showcase here a sample of a tailored high level on boarding plan where there is a specific list down of the frameworks, surveys ratings or rankers and also the output reports as well as the key platform deliverables where there is specific tailoring associated with the customer if they're specifically outputting KPI dashboards at a quarterly cadence specific framework indices and also if there are going to be solution adoption requirements or enablement trainings that need to be called out if there are multiple stakeholders for the delivery process. We recommend highlighting an overview of the key meetings and syncs with the customer team as well as the key build activities that an implementation team would be leading. Setting it up in this sequential stages, helpful to visualize the process from a kickoff call to the eventual close and project wrap up.

We highlight the key activities around a discovery call, design call, the build call and also what would be necessary for each work stream. We recommend sharing this kind of visibility with the customer team to ensure that they have appropriate provisioning of time requirements and also key team members that can provide insight into the different stages that will involve the data collection process, framework definitions, the factbook staging and also the validation of the reporting outputs. We share a very high level in general implementation timeline and this timeline is anchored across those four key pillars of the base solution. We typically recommend beginning with the data collection work stream as this feeds the different elements downstream inclusive of the factbook and the report builds as well as tailoring how data is going to be organized across framework management. We typically allow and recommend that from beginning to end, there is approximately a time of one, two three months understanding that these timelines could be compressed if there are certain key priority areas but this helps sets the stage for a customer team on what may be needed and if additional tailoring is necessary to meet those customers processes, there is time to do so and also prioritizing if potentially maybe a report build needs to be published first, then this could be moved up and then later and talk through with the customer team about their data collection process and how they managed and aligned to specific frameworks.

As we segue to the alignment phase, we highlight some of the key recommendations than are helpful in preparation for a kickoff call setting up the class customers workspace and understanding who would be a workspace owner for permissioning, recognizing that later additional users could be added after the meeting and after provisioning the workspace. Some of these early alignment discussions or correspondence should capture the frameworks that are being leveraged what are some of those key pain points that are part of the current process in any aspects that may not be captured in this statement of work and maybe shifted to a further phased approach of implementation after an initial phase one. We do recommend very early on in this preparation to share with the customer and the outline of the document request checklist. We'll review this checklist on the next slide, but it generally includes the sustainability report, any presentation associated with it as well as the disclosure the templates for the data conduction framework mapping and questionnaires that the customer and industry is aligned to and also if there are any cross framework referencing that the customer leverages in the event that they align to additional frameworks beyond the base template solution. As we review the document request checklist, we see the key for pillars and the requirements and asked that we encourage a customer team to provide as early as possible in this alignment process. For the data collection, we recommend reviewing all those files and interfaces that a customer uses to collect data across the multiple streams, topics and providers, If there is some data that is combined into a single file, we recommend that the customer highlight how that consolidation is also taking place.

Across framework standards and survey, we recommend that if a customer has already gone through a reporting cycle, that there is a full list of how the disclosures and what specific item levels of each one of those frameworks is outlined if there is also a customer guided framework to framework mapping. As an example, if they understand what item level in GRI is going to also be reported in SASB these kinds of relationships are very helpful to set the stage for the implementation team for reporting outputs, any kind of prior publication of the sustainability report or sustainability presentation or even KPIs and disclosures are essential in setting the stage on how to prepare data to be consumed. Style guide information which is very design and brand heavy and what are some of those brand guidelines is best to capture earlier on in this process as well as any historical frameworks that may not be reported on or additional frameworks that a customer would look to disclose in a new reporting cycle. And lastly the key list of personnel and team members on how data is collected where it's collected, the geography and also if the customer is engaging externally to collect specific different scope level data potentially with their party or different vendors that helps them provide or have insight into some of this downstream inputs that are being disclosed in their final sustainability reports. We provide a sample of what a documented request might look like in this sample file as well as the association of specific metrics that are relying to some key frameworks. If a customer provides an Excel spreadsheet such as this one some of the key things to highlight that are very beneficial and helpful are our call out to what would be that frameworks disclosure so we can see both the GRI disclosure and the SASB disclosure for the respective social information and the sub topics within that social category. There's also historical level and current year information that are those data values aligned to these specific metrics and this is very helpful as we look to prepare for the Discovery sessions and some of the early validation of data collections. Recognize that a file also includes the provider and our final data reviewer of this continent information, this also helps provide insight on who may need access to the specific ESG workspace and who might need to be provisioned into a final data collection section. In summary as we think about the preparation for kickoff and alignment phase provisioning the customer account and confirming those objectives for a successful delivery are a key starting block, having an accurate understanding of the project timelines and what may need to be moved up or what maybe to be revisited later that works in conjunction with the documented request checklist is very tied hand in hand with the scope of the deployment and also if there are any data dependencies, whether data is being captured internally or externally or potentially even from an external system and potential integration. We recommend the flexibility but outlining what is that cadence of communication that will be set up by the implementation team with the customer and as the next step would be to schedule a series of discovery sessions where there will be time to discuss data collections, the framework centers and surveys the factbook staging and as well. The reporting outputs, the tie in with all the key people that make a part of the ESG reporting process.