Discovery Report Outputs Preparation

For the ESG Reporting output discovery session, we typically find that most ESG related reports are highly stylized via design firm that leverages specialized design software like InDesign. This Discovery session is typically focused solely on reporting outputs as the client team and design firm or internal design marketing team can usually work in parallel while the data model is built. It also gives the team working on that data model a clearer understanding of the results they need to build towards. Depending on the client's timelines, this Discovery session can be prioritized or moved back based on project requirements. It's key that somebody from the design firm or someone that works closely with the design styles is present on the call and can articulate the requirements needed for the final deliverables. This will help ensure that the expectations are clear as to how the design agency will work with Workiva output and if that would be disseminated via ICML files or Docx files.

Based on the materials that have been provided by the client, any high level feedback that is captured in the walkthrough post kickoff call, a more detailed sample document can be prepared to help discuss key client requirements. As we take a look at some of the ESG Content sample, this is content that has been designed outside in the final design software beyond Workiva, and here this example will speak to the skeleton and partial or full setup options that will be approached as part of an ESG delivery. We begin by taking a look at the skeleton setup. We recommend to prepare some of the basic section names to match the client output. Look for a table that involves maybe a narrative that would change every year to year to mention table that would fall with or without a scope. Look for tables that have key facts like HR environmental data that should be consistent as in scope tables and prepare how a style can be added to the style guide and apply to the content. This allows us to also show how the table and narrative content can be linked into the fact book, and if we take a look at the skeletal options here, at the top for both the content in Workiva and the design in InDesign or both the content InDesign and Workiva, the recommendations bring the document skeleton and style guide to Workiva if we consider a partial or full setup that have both choices across both the design or Workiva or the design outside of Workiva.

We recommend importing this content into a separate sample document. Look for an example of the content that will change for each reporting cycle, thereby ensuring that there is a clear understanding of what would be handled outside of the Workiva platform. We also recommend to look for content that remains the same and therefore the impact format is consistent with the original format as a potential example that would be replicated. We also recommend showing how the style guide is imported, how client can edit it and here, it also makes sense to highlight a table, a narrative text that can be linked directly from the factbook to a final report. We would recommend to prepare the delivery steps of the slide based on the approach, thereby suiting the client's needs, and be prepared to further articulate any changes that might be different based on the project requirements. This decision tree highlights some of the key facts on whether to bring in the content, the style and the design visuals based on the choices that a client would be working in their work stream.