Discovery Frameworks Part 1

The key aspects of the framework Discovery call are to clarify the content and mapping for each of the in scope frameworks standards, questionnaires, raters and rankers. At this stage, it's usually helpful if the data collection templates and the reporting output with the template factbook tables are already in the build phase as this gives a clear requirement for the data to be mapped and the output required by the client. Nevertheless, we understand there might be some tasks that can be parallel process but we do find it helpful to have a tangible example to show how the model works, how the information flows and how it's grouped together accordingly based on the selected framework mapping, As you prepare for the frameworks calls, we recommend reviewing what is covered in the statement of work as what is going to be in scope likely being a combination of frameworks that are part of the base solution template as well as potentially including other frameworks that the customer may align to in addition to the ones included in the template. We recommend reviewing the files provided to better understand the granular nature of the outputs, whether they be framework indices or questionnaires that go to publishing.

As an example, if there is a GRII index table that is populated by a specific section reference one may not need to map all of GRI if they also have other existing mapping that is tailored to a specific questionnaire or a rater or ranker.If there is a high degree of granularity that may be a better suited to focus initially first on remapping especially if the customer may not already have their own internally defined alignment as this will enable to have a general starting point for a team that maybe newer to ESG reporting. We recommend reviewing any framework mapping content files that maybe also captured with the data collections in the event there are frameworks that are beyond those included in the base template solution. We also recommend preparing an example of the data flow for one of those supported frameworks with that specific map being applied. Generally we see GRI or SASB as good user based examples for more clients to begin with. By leveraging this as a starting point we recommend preparing an example of all questionnaire data flow or an unsupported framework if needed for the project. As we prepare for the supported frameworks conversation, we would like to highlight to the customer if there is already existing supporting documentation on the Workiva website as to how they can also leverage the ESG Explorer that is meant to be a resource to look up framework information, respective topics as well as metrics and do comparisons across the different frameworks that are part of the base template solution. As highlighted here the framework ESG Explorer would be enabled within the customer's workspace and they would be able to leverage this and we recommend leveraging this tool if it helps ground the customer team with the delivery team on where are some of the key focus areas for each. Either framework or standard.

We recommend grounding the conversation for an example, beginning at the factbook index as this is a useful starting point to compare what a customer would be reporting in their disclosures as well as confirming the level of granularity they would be publishing as an example if they would just be page references versus the actual disclosure known or corresponding values. As we continue this supported framework example, the main theme to communicate is demonstrate how the client can use a data validation drop down in addition with established formulas to tailor the table that would help them stage data to prep for publishing. Here we can begin by going back to the data collection and if we reference our overlay sheet example where a customer team has provided specific framework mapping for some of these specified metrics, we can highlight that the topic section and disclosures that have been selected here correspond to the GRI mapping that was filtered in the factbook index. For these specific values we can highlight as an example that you know relevant count we can zero in on a specific content to showcase this information. By highlighting the flow of a specific value as in this example here, we can use our formula navigator to confirm where the data entry is taking place for this value of 15 which is specifically in the overlay sheet directly above then is staged in the flat file. We recognize here are corresponding mapping across the frameworks and will follow the example to share with the customer team of selecting the topic section and disclosure that is subject to the team's confirmation as part of this discovery process. In the GRI mapping that is part of the base template.

We filtered down to the GRI item levels Inclusive of 4.1-3.1 and here we can then also confirm with the team this topic section and disclosure has a corresponding description as well as value type that would be associated with it. This is meant to serve as a starting point and the customer can ultimately provide the final guidance on the matchup between values and the corresponding framework numbering. After staging the data and pushing the data to the Wdata table, it's helpful to show the relationship on how this information flows to the factbook. The fact book will receive a data output that is the consolidation of all the data entries that has taken place within the data collection, a list query that allows to organize the information that has been captured in a unique identifier code across different frameworks that are supported for that deployment and then pre-staged framework indices where it's helpful to show to a customer team how they can select via the data validation drop downs the value as well as the unique identifier that has been tagged with their corresponding descriptions, the metrix, the stipe and also in this case we were calling out the information for the first quarter. Upon selecting this value from the data validation, the dynamic formulas that are part of the base template we'll take a look at the data output section and return that corresponding value. Here we can see 15 9s that value that was inputted in the data collection. In a similar manner, we can carry out a similar exercise for the corresponding SASB mapping and as part of the discovery process, it is helpful to ensure that the customer understands the flow of information if there is a certain level of tailoring that may be needed to how they align to specific frameworks, which one would have a primary alignment, which would have a secondary alignment but once we're at the factbook level, then this will allow us to stage further information.