Video Transcript

Discover Call Preparation - Staging Content

In preparation for the Discovery sessions and after importing the Base Solution Template pack, we recommend to carry out some key customizations in order to set the stage for the forthcoming Discovery sessions. We first recommend to take a look at the ESG Report, Annual report or Sustainability report that the customer has provided and identify useful tables with some key data points that are currently a part of their unstructured data collection process. We'll then recommend to copy this table or import the Word document into Workiva as well as setting a stage in the Factbook with a matching formatting, which we'll highlight here to also set the stage for the client.

After this, we recommend to navigate directly to the data collection spreadsheet that is part of the Template Starter pack and identify the list of metrics that have been provided by the client in terms of their own documentation, thereby determining a sample column and a structure for this data collection template, and as we can see here we've identified sections, the metric, also a value that would be capturing associated with those metrics as well as some of the general framework considerations of the data provider, approver and the status of that data collection. This is meant to serve as more of a placeholder for the data and provide some initial guidance on the formatting of what is needed in order to be consumable in this flat file structure. After staging the content, you would then establish an outgoing connection to the Wdata data collection table as highlighted here. Once that connection is established, it will push the values and the information that's been selected here in Wdata. We would then take a look at the framework information that has been highlighted by the customer, whether it's a framework that is already supported out of the box from the template sections.

As we are highlighting here with GRI, here, we have established a connection that also is an outgoing connection that goes to the framework items in the Wdata table, but if there was also a custom framework, there would be an opportunity to take this templatized approach of the headings and set up a sample set of rows that highlight maybe a different framework or standard that the customer would be leveraging. And finally, within the fact book, which we previewed earlier, we would establish an incoming connection that would be from the primary query in the template as highlighted here and this is actually reduced sample that is really designed to illustrate the purpose of bringing the value and data information that's been collected as well as some of the information that was present there across the data provider, the review of the status and those metrics and categories that were associated. In this staging we can also highlight and see that the content has been designed to match the consumable locations in the document. In the event that the client does not provide sufficient information to prepare a more customized end to end walkthrough, we then recommend to use the default setup in this base template solution that has some placeholder values and data to illustrate how data flows in the ESG Solution.