workiva

High Level Project Planning

The high level project planning template is a way to collaborate with the client and agree on timelines for each of the project deliverables. The template is broken down by each project work stream namely data collections, frameworks, factbook and the report outputs. Each of the project deliverables and key milestone should be listed based on the understanding of the statement of work and the clients deadlines. In some cases it's not always 100% clear what the client expectation is for each deliverable, so we recommend collaboratively using this temple to show and highlight the understanding of timelines and make adjustments as needed. There are instances where the project overlaps with the reporting cycle and in this case we expect that there will need to be some flexibility depending on the client's internal deadlines and if any of those deliverables will be used.

As an initial example, the client in the middle of a reporting cycle and the projects are all needed for the next cycle iteration. Here the expectation is that the example reporting output i.e., maybe the Sustainability or Integrated Annual report will be delayed until it's officially released by the client, thereby allowing us to focus on the data collections side of the work stream. In a second example, the clients in the middle of the reporting cycle and those deliverables are in scope for that reporting cycle, so here it's important to prioritize these deliverables based on those client requirements. The client requirements typically focus on the integrated annual report or the indices as an example, including GRI, SASB, TCFD and leveraging the data collection templates to be set up for the initial phase, thereby allowing the reporting outputs and the questionnaires, ratings and the rankers to follow after the fact.

Overall it is important to set expectations with the client that there will be active involvement to provide discovery feedback, review, validate the design, provide even the framework context and content that the organization reports to in their outputs. We find it useful to work in simultaneously 1-2 work streams, as an example of the data collection and reporting outputs, so essentially preparing that output report but also getting ready to stage how the data is going to be captured and then after the fact looking into increasing those work streams as an example, the framework mapping once the data collection process is past the design phase, this ensures that there is sufficient bandwidth for the team and you're able to hit some of these key milestones and deliverables in their respective timelines. Although this slide may look like a purely project management slide, we do encourage the implementation team to be significantly involved in the creation and collaboration of some of the assets, specifically for those timelines in order to break the prioritized tasks in a logical and timeline focused approach.