

## Data Collection - Discovery - Intro 1

The discovery session around ESG data collection is generally the largest aspect of the project and also the most involved. Discovery phase session is they're usually many sources and teams of people that need to collaborate across a common goal. This makes it important to begin this process as soon as possible since there are potentially other projects or aspects that can be worked in parallel. Depending on the client, we generally see a combination of data from source systems as well as unstructured data that lives in emails, Excel files, SharePoint drives and other similar content. The majority of the time, unstructured data makes up most of the data points that will be brought into the Factbook to stage for performance tables and also aligned to framework and indices. We recommend working directly with the customer and DC lead would be providing these files and information and also discussing the approach of the data collection as well as the status tracking with data providers and approvers. We also recommend setting time to test import of existing files as well as discussing with the customer, the model and the tagging system that allows the best organizes information. There is also supportive documentation across processes, functionality within Workiva that outlines status tracking for data requests that can be leveraged as part of the data collection design and build.