
Software checklist

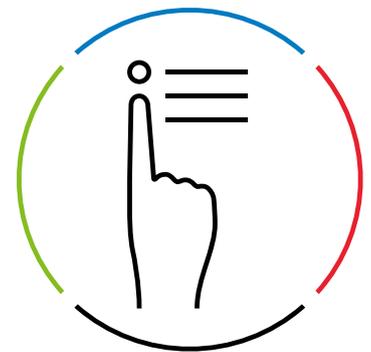
ESG and sustainability reporting software

Compliance with ESG and sustainability frameworks has revealed shortcomings in the reporting process:

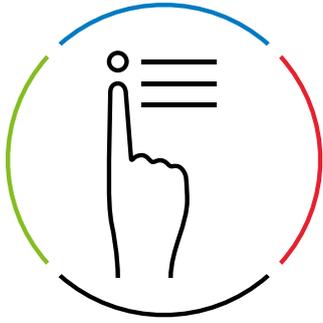
- ESG data is isolated in department, LoB, or subsidiary siloes
- Accuracy is compromised by ever-changing disclosure requirements
- Risks go unchecked as processes lack mechanisms for KPI oversight

ESG and sustainability reporting software streamlines data collection, automates compliance, and formalizes KPI monitoring and risk management. Best-in-class software takes this offering one step further with planning tools that optimize sustainability plans and outcomes.

This checklist is a comprehensive overview of the capabilities you should look for in an ESG and sustainability reporting software. Use it to identify software that enables compliant ESG reporting and improves sustainability performance.



Requirement	Functionality	CCH® Targetik	Vendor 2	Vendor 3
Data management 	<p>Does the system automatically collect and centralize ESG data from different sources?</p> <p>Can you add additional ESG data, manually, in a standardized way?</p> <p>Does the system automate data compliance with ESG frameworks relevant to your organization?</p>	<p>Yes</p> <p>Yes</p> <p>Yes</p>		
KPI monitoring and disclosure management 	<p>Does the system come with pre-configured KPIs compliant with ESG frameworks relevant to your organization?</p> <p>Can you create custom ESG KPIs?</p> <p>Does the system have dashboards for real-time KPI monitoring?</p>	<p>Yes</p> <p>Yes</p> <p>Yes</p>		
Analysis and calculations 	<p>Can you drill into KPIs to better understand results?</p>	<p>Yes</p>		
Governance and reporting 	<p>Can you automatically add ESG disclosures into annual reports?</p> <p>Can you manage ESG contributions and contributors from all levels of the organization?</p> <p>Can you automatically generate attractive and visual ESG reports quickly?</p> <p>Can you easily audit ESG disclosures and ensure data integrity?</p>	<p>Yes</p> <p>Yes</p> <p>Yes</p> <p>Yes</p>		
Strategic planning 	<p>Can you connect ESG performance to financial outcomes and operational activities?</p> <p>Can you manage and monitor ESG risks?</p> <p>Can you run scenarios to see how ESG performance will be impacted?</p> <p>Can you forecast ESG KPIs?</p>	<p>Yes</p> <p>Yes</p> <p>Yes</p> <p>Yes</p>		



How CCH® Tagetik ESG and Sustainability Performance Management meets critical capabilities

Requirement

Functionality

Data management



CCH Tagetik ESG and Sustainability simplifies the data collection of widespread, non-financial ESG data through:

Data collection:

- Automatically collects data from different sources
- Pre-built compliance with EU Taxonomy, GRI, and SASB through data models and data entry forms
- Data entry forms for other KPIs (managerial and compliance with frameworks)
- Data collection at different levels of granularity and across multiple levels (group, entity, department)

Data normalization:

- Automatically normalizes and validates the data it collects
- Automatically augments external data via Data Entry functionality

KPI monitoring and disclosure management



CCH Tagetik facilitates compliance with ESG reporting frameworks and KPI monitoring through:

KPI disclosures:

- Pre-configured KPIs for GRI, SASB and EU Taxonomy
- Ability to configure custom KPIs (ex. Managerial KPIs)

KPI monitoring:

- Pre-configured dashboards, for example:
 - GRI: Emission, energy consumption and reduction, HR management
 - EU taxonomy: Eligibility indicator, derivatives, government bonds investments, eligible/non-eligible assets vs total asset for climate adaptation and mitigation, asset breakdown for counterparties
 - SASB: Emission, energy consumption, water withdraw and consumed, air emission, renewable sources, workforce safety, risks

Analysis and calculations



CCH Tagetik gives you the tools to calculate, monitor, and analyze ESG performance through:

Dashboards that facilitate granular data and KPI analysis:

- Geographical area breakdown
- Year-over-year comparison
- Data filters
- Ability to display or hide elements
- Ability to pivot view
- Heatmaps that indicate KPIs influencing final results
- Ability to view regional impacts

Ability to calculate:

- KPI eligibility
- Total turnover
- CAPEX
- OPEX
- Percentage of eligible/non-eligible asset over total asset
- Taxonomy eligible/non-eligible economic activities vs total turnover
- Custom KPIs and calculations

Ability to mix and match KPIs from multiple frameworks

Governance and reporting



CCH Tagetik facilitates collaboration, control and accuracy in ESG reporting through:

Annual report integration:

- With the click of a button, add dynamic ESG charts, tables, and narrative to annual reports through a Content Data Model (CDM)

Flexibility:

- Immediate software updates when frameworks or regulations change

Workflow:

- Pre-defined, configurable workflow for every ESG process
- Step-by-step workflow management at the entity, subsidiary and group level

Contributors:

- Ability to separate responsibilities at the department level and reconcile at the group level
- Contributor management at legal-entity and department levels
- Ability to add comments and attach documents to data entry forms

Illustrative reports:

- Illustrative, ready-to-present dashboards, tables, and reports that automatically update with the latest disclosure results
- Ability to drill through data and explore granular information
- Ability to visualize aggregated data
- Ability to certify, decertify and edit reports down to the chapter and single paragraph-level

Data integrity:

- Diagnostics for rule violations and inconsistencies, plus auto-suggestions for correction
- Automatic data quality and normalization capabilities
- Ability to perform preconfigured data checks (ex. consistency and coherence validation)

Strategic planning



CCH Tagetik facilitates improved performance by connecting ESG initiatives to financial and operational outcomes through:

ESG planning:

- Ability to connect actuals with planned data to evaluate ESG initiatives
- Converged KPIs management and monitoring
- Ability to integrate sustainability reporting in the integrated annual report with financial, nonfinancial, ESG data and narrative
- What-if scenario analysis and simulations for ESG performance impacts on:
 - Departmental / operational plans
 - Financial outcomes
 - ESG scoring
- Ability to project and forecast future KPIs (ex. CAPEX, OPEX, turnover)

Risk management:

- KRI management and reporting
- Ability to assess corporate risk exposure by:
 - Testing assumptions
 - Goal setting
 - Forecasting outcomes
 - Managing ESG portfolios

Get compliant and do more good with CCH Tagetik ESG and Sustainability Performance Management

[Learn more on our website →](#)

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