

WORKSHOP A

Enhancing data and technology capabilities

30 January 2025

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01



From data led to insight led and
driving business outcomes

Driving outcomes from your data

A focus on data-driven processes is critical to delivering the insight needed to achieve your sustainability goals, enhance business resilience and meet reporting requirements.

DRIVING EFFICIENCY

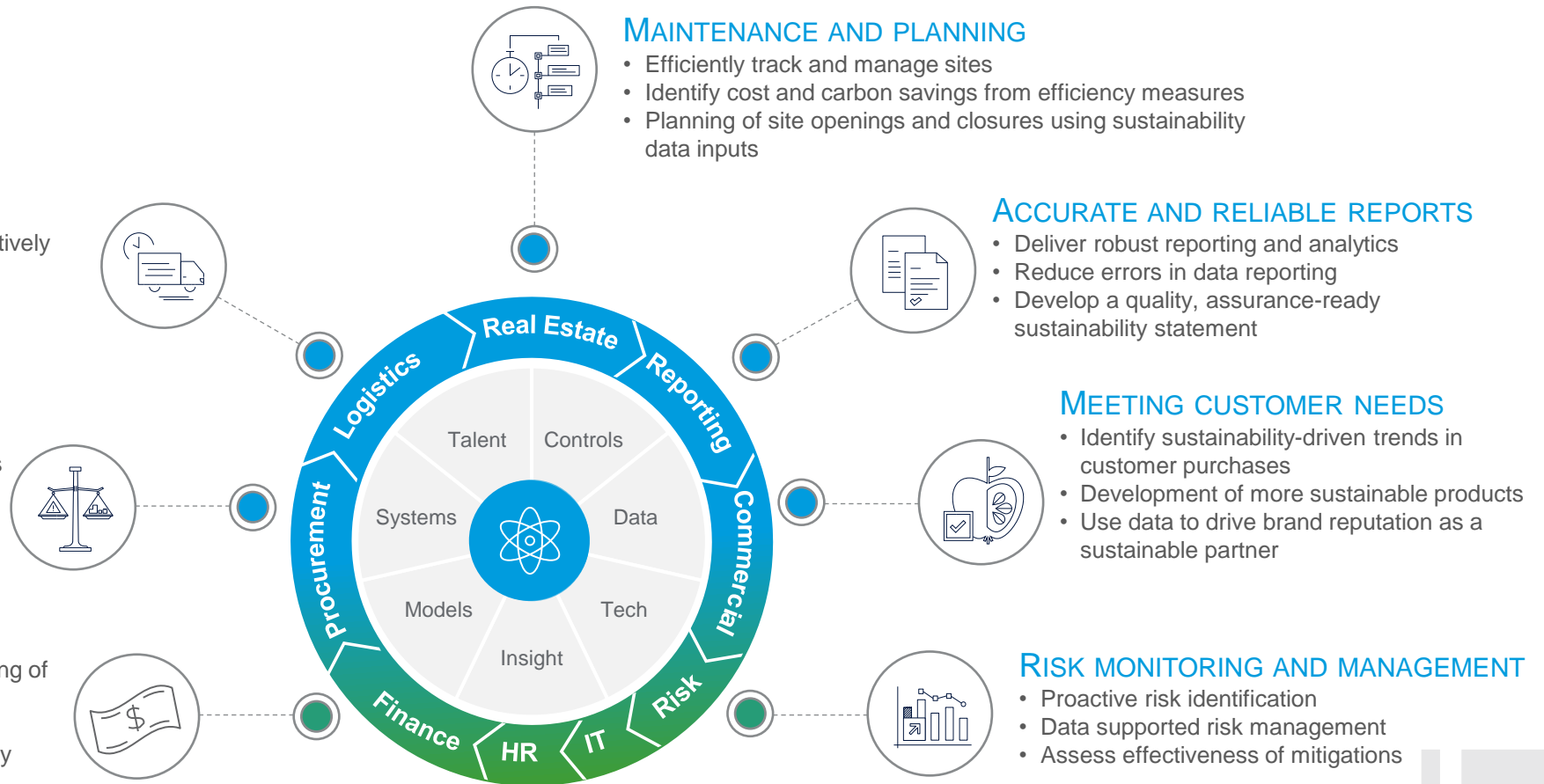
- Serve customers faster and more effectively
- Measurement and telematics systems identifying efficiency opportunities

STRATEGIC SOURCING

- Proactively manage supply chain risks
- Understand supply chain dependencies
- Establish strategic and sustainable sourcing function
- Data sharing with suppliers

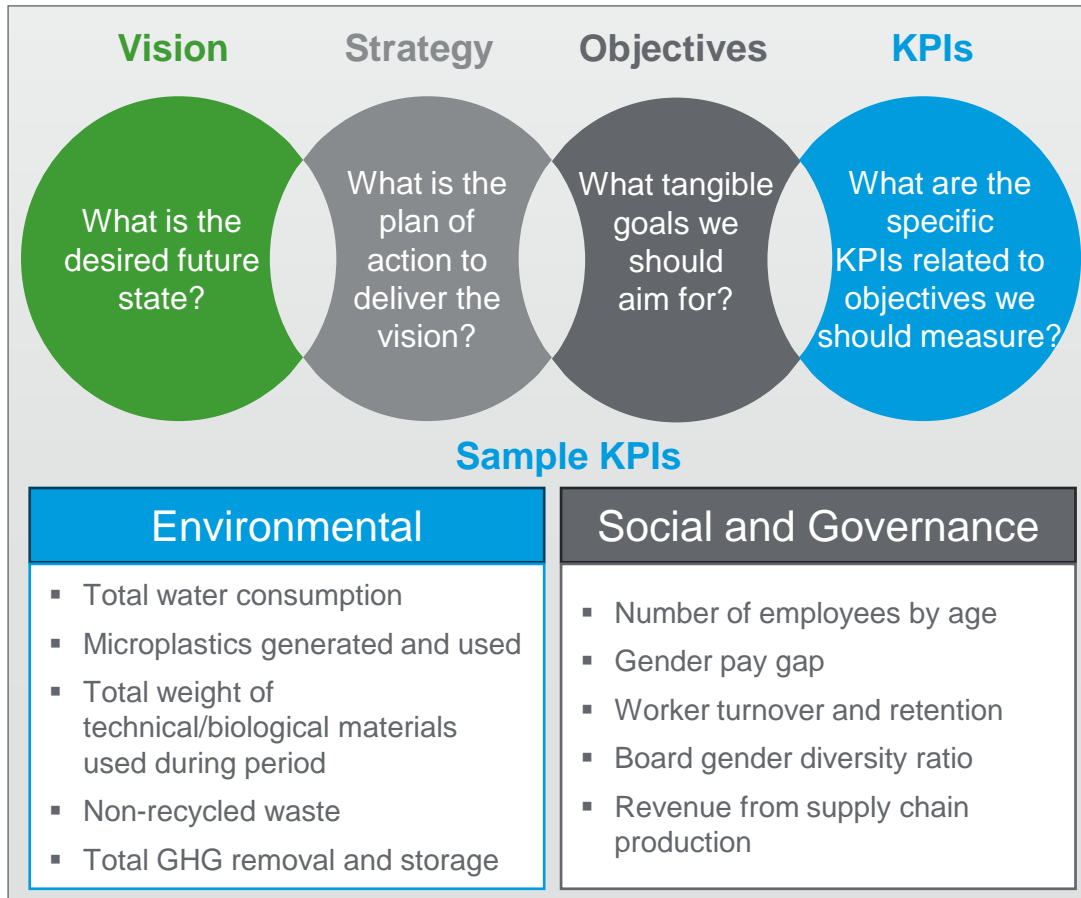
FINANCING THE TRANSITION

- Data supported modelling and forecasting of sustainability-related impacts, risks and opportunities
- Financial planning linked to sustainability initiatives



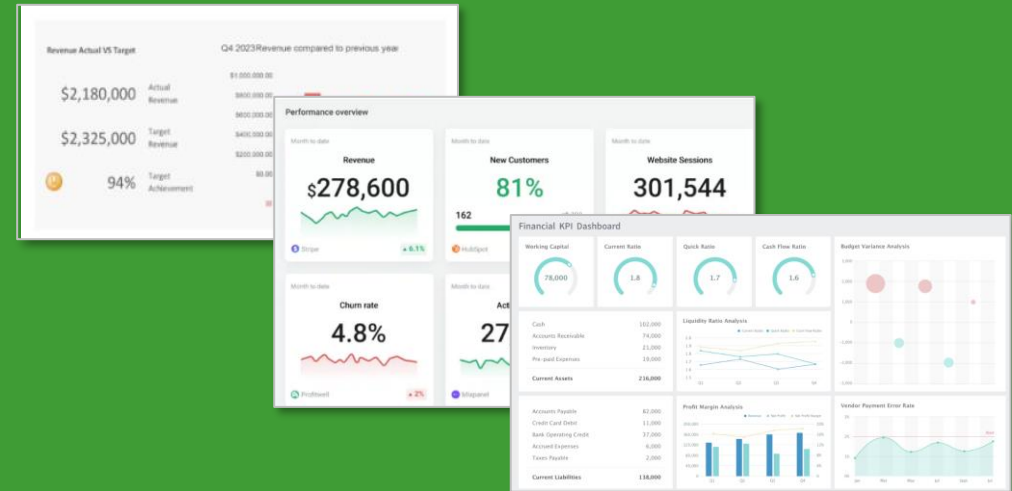
Driving outcomes from your data

Using data to create more business impact and value.



Robust multi-level reporting

- KPIs need to meet the reporting requirements across all stakeholders and levels of organisation, from investors, regulators, and company
- ESG reporting needs to align to both strategic and operational requirements
- System architecture needs to support data requirements and a single source of the truth to ensure scalability in an auditable way



The dashboard displays several key metrics:

- Revenue Actual VS Target:** Actual Revenue: \$2,180,000; Target Revenue: \$2,325,000; Target Achievement: 94%.
- Q4 2023 Revenue compared to previous year:** Performance overview showing Revenue at \$278,600 (+6.1%), New Customers at 162 (+81%), and Website Sessions at 301,544.
- Financial KPI Dashboard:** Working Capital (78,000), Current Ratio (1.8), Quick Ratio (1.7), Cash Flow Ratio (1.6), Churn rate (4.8%), and various financial ratios like Accounts Payable, Credit Card Debt, Bank Operating Credit, Accounts Receivable, Pre-paid Expenses, Taxes Payable, and Current Liabilities.

02



Building strong foundations
through data strategy and data
governance

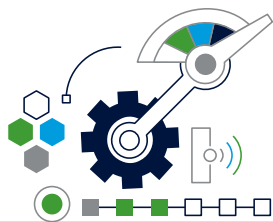
Building the foundation through a data strategy

Regardless of size and complexity, you must have a clear vision and plan, underpinned by a data analytics strategy.

01

Business Strategy

Align your data strategy to support your business strategy



02

People and culture

Adopt a data-driven mindset across the entire organisation to empower innovation and upskill resources to support initiatives



03

Process/Data

Understand the current state of your data and lay out a scalable foundation



04

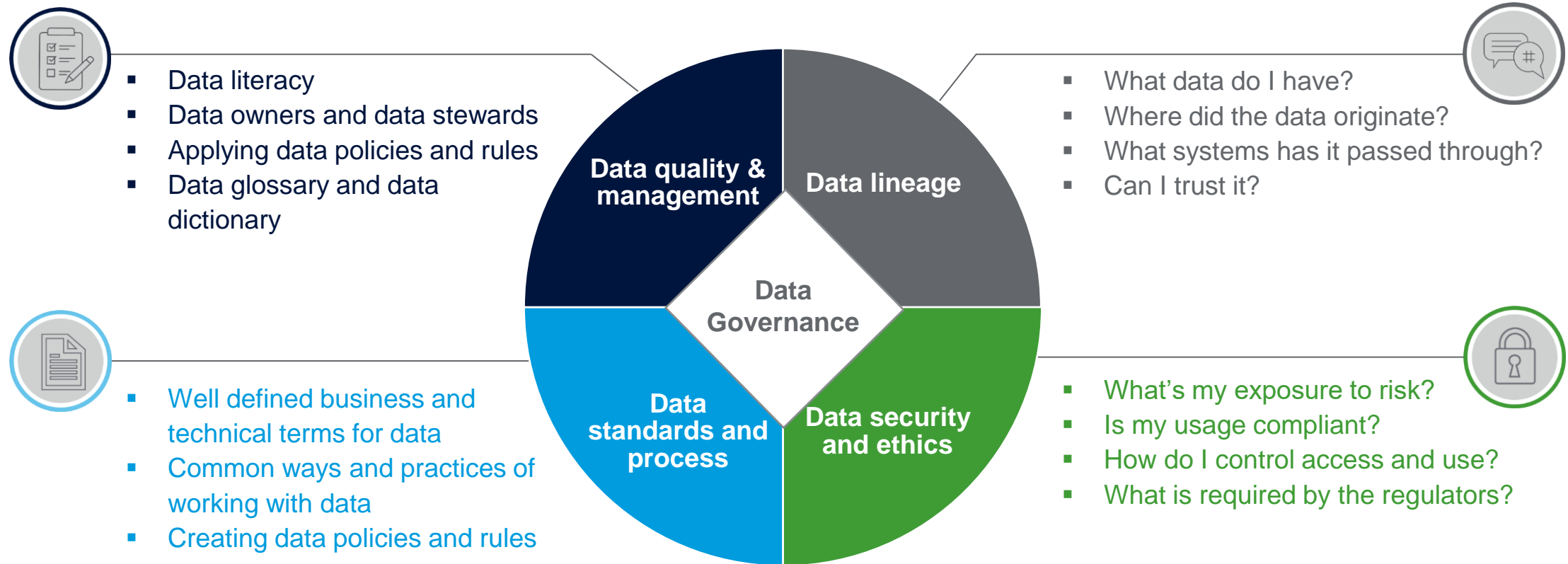
Technology/Tools

Understand current and desired data platform and identify appropriate BI, analytics, automation and AI tools



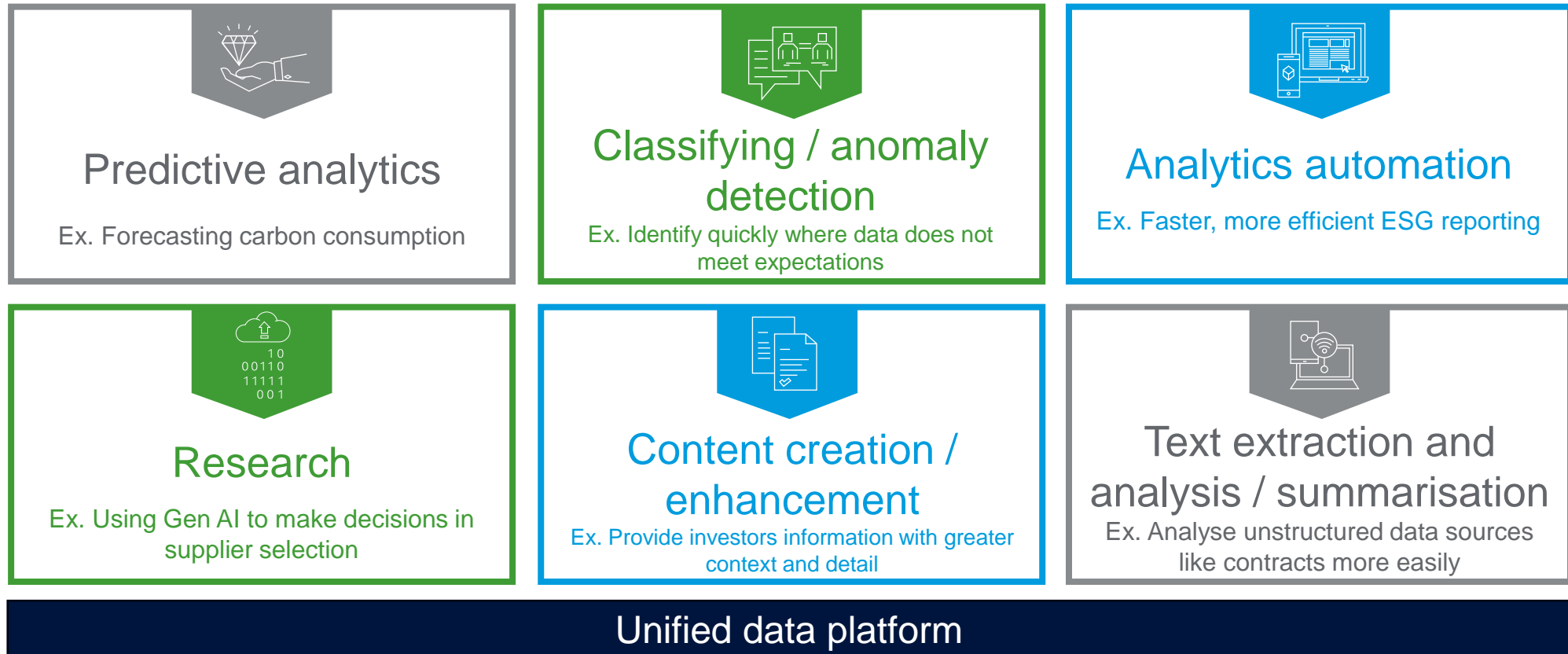
Components of a data governance framework

Data governance is critical for providing stakeholders with accurate, trusted data to gain impactful data driven insights.



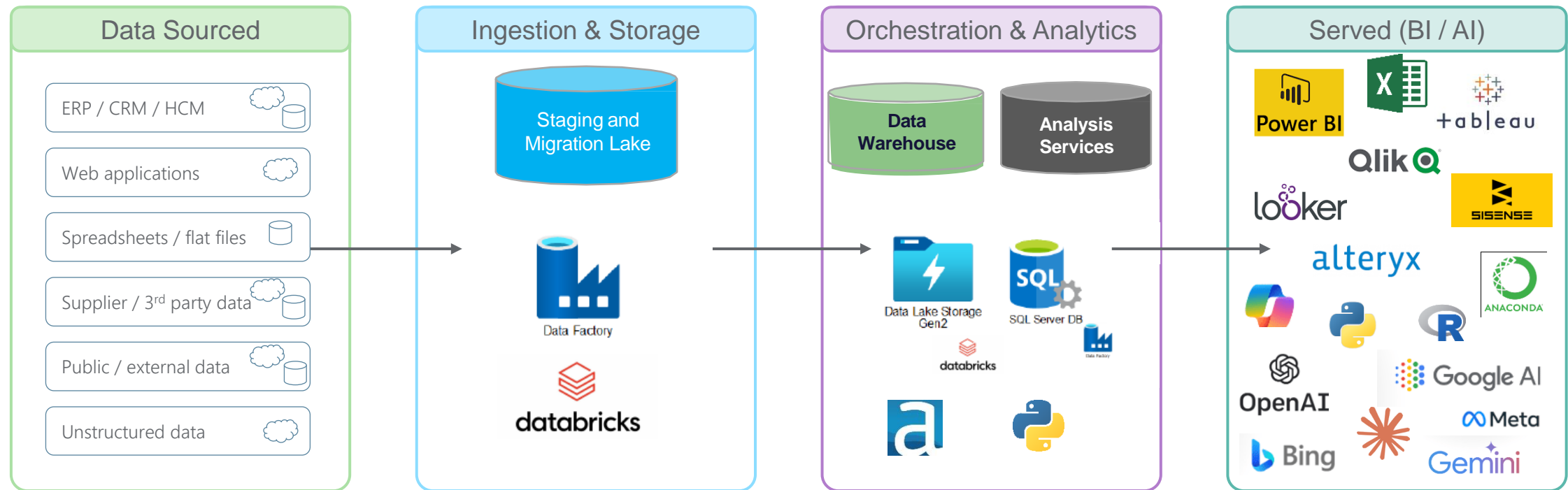
Identifying opportunities for analytics

Building on the strong foundations of a data strategy and data governance it's important to identify ESG analytics use cases with clear end goals.



Establishing the right technology architecture

There is no one size fits all when it comes to technology. Select tools and technology that align with your overall IT strategy and best meet the needs of your end users.



Tools & Technologies

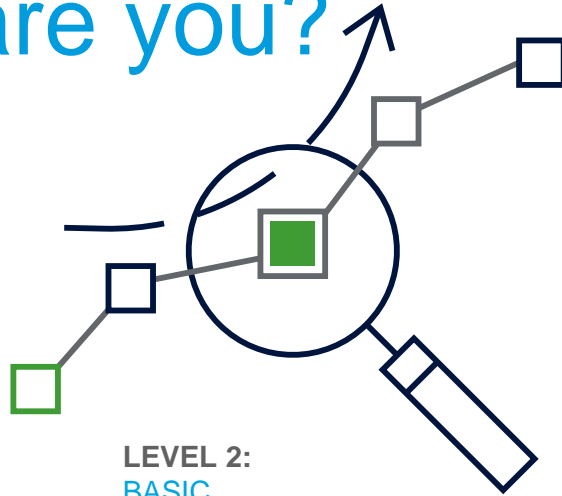


04



How mature is your
data?

Where are you?



LEVEL 1: LIMITED

- No data strategy or data initiatives
- Little-to-no standardised KPIs, processes, or governance
- Limited analytics capabilities
- No master data or single source of blended data

LEVEL 2: BASIC

- Siloed data initiatives occurring across the business
- KPIs & Analytics are identified, but not well used
- Business driven governance has started
- Some shared data across BI applications and integrated systems, no single source of truth

LEVEL 3: INTERMEDIATE

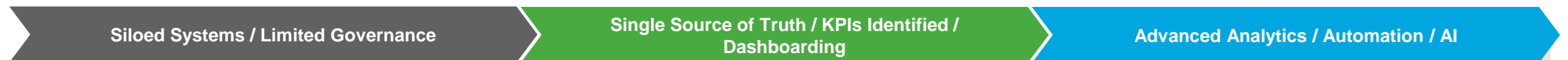
- Data initiatives are driven by organisation goals, starting with quick wins that have large impacts
- KPIs & Analytics are identified and used effectively
- Standards and processes exist across the organisation but are not uniform
- Data architecture is consolidated and consistently upgrading

LEVEL 4: ADVANCED

- Data strategy drives all data maturity efforts and initiatives
- Defined data literacy programs and data stewards exist
- Data is governed, KPIs are defined, and processes are standardised
- Technology and tools are accessible, bring data together, and exist without duplication to support across the business

LEVEL 5: TRUE INNOVATOR

- Data strategy drives on-going expansion of analytics adoption and initiatives
- Data analytics community exists leading innovation of emerging trends
- Advanced analytics, data modelling, and artificial intelligence (AI) techniques are being applied to explore and ask questions of data from across the business



Question time: data and technology maturity

01

How do you perceive your organisation's data maturity compared to your peers?

02

Which best describes how analytics skills are deployed around your organisation?

03

How would you describe the tools available to you for analysing data and generating insights?

04

What value does your organisation place on data when making business decisions?

05

To what extent do you trust your data?

06

When producing reports, how much time is spent on data preparation?

07

What best describes the state of your data governance framework?

08

How confident are you in knowing the source of your ESG data?

09

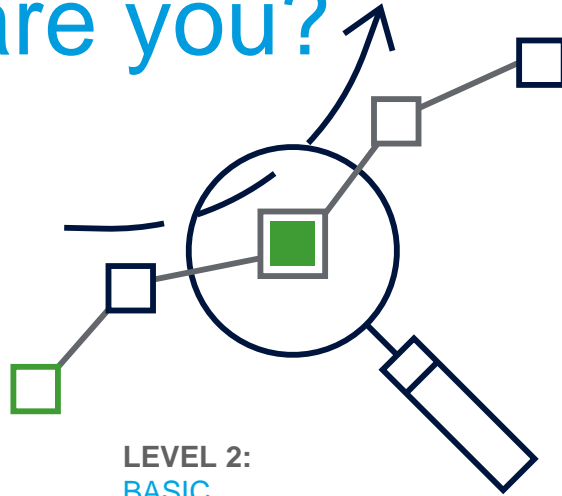
To what extent does your data environment limit your ability to deliver on your ESG and overall business strategy?

Join at Slido.com



#5458392

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Current trend across industries

Siloed Systems / Limited Governance

Single Source of Truth / KPIs Identified / Dashboarding

Advanced Analytics / Automation / AI

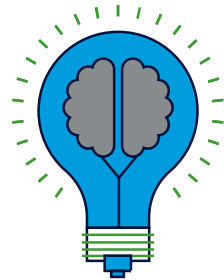
05

RSM

Discussion: how can you
move up the curve?

Activity: putting theory into practice

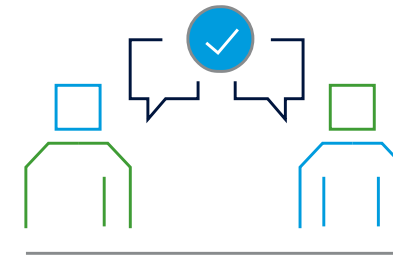
Individually



Note two or three opportunities for advancement in your ESG reporting capabilities, describe how your business would benefit from these, and note challenges you may face

3 minutes

In groups



Share your ideas, the benefits, and the blockers and challenges you anticipate encountering

20 minutes

How we can help you get started

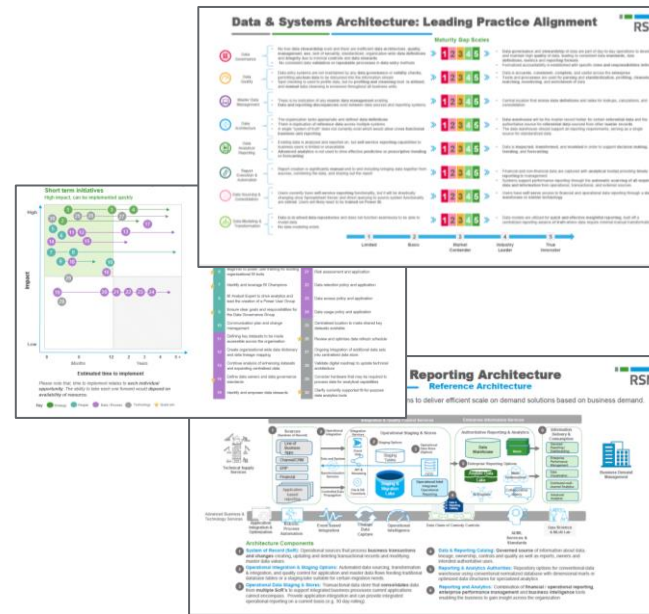
01

Identify and assess your sources of data against their effectiveness to meet your strategic objectives



02

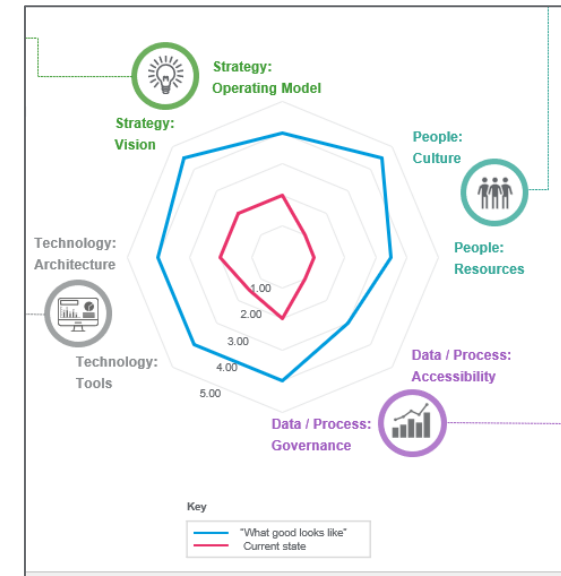
Diagnose the current state maturity, architecture, and determine the desired future state based on your appetite



03

The outcome will provide the basis for:

- the future state data analytics landscape
- prioritised improvement initiatives
- transformation plan and business case



WORKSHOP A

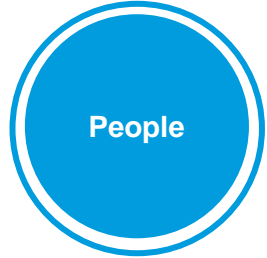
Outputs and considerations

Analytics challenges and opportunities with ESG reporting

Strategic program

Challenges

Opportunities



People

- Communication challenges
 - Organisational tension between teams
 - Ad hoc approach to training
 - Lack of knowledge management
 - Lack of specialist data expert
 - Single point of failure
- Turnover of staff with organisational knowledge
 - Incentivising suppliers to comply with data requirements



- Open communication
- Shared vision
- Formalised training
- Centralized knowledge management
- Opportunity for flexibility and growth
- Improved integration with other teams



Process

- Manual and paper-based processes
 - Non-standard processes
 - Lack of incentive to improve supply chain
 - Risk to scope
- Business reporting timescales
 - Supply chain data validation
 - Green washing
 - Separation of ESG and Business strategy



- Automated and paperless processes
- Robust data integrity and governance
- Standardized business processes
- Better education with colleagues and within teams
- Using a risk management approach with supplier contacts

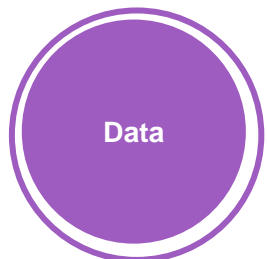


Technology

- Lack of system knowledge
 - Limited system integrations
 - Lack of central data repository
 - Adequate infrastructure for data
 - Compounding tech debt
- Moving data into financial reporting space
 - Spend based methodology for data
 - Ensuring the data is reactive enough
 - Sustainable sourcing options for data requirements



- Centralized knowledge management
- Robust data integrity and governance
- Fully integrated technology
- 360° view of the customer
- Shared reporting on consistent data



Data

- Lack of trust from data sources
 - Partial view of the customer
 - Mismanaged data
 - Poor data quality
 - Lack of supply chain data governance
 - Multiple level vendors
- Not taking responsibility for our data
 - Lack of trust from data sources
 - Data availability
 - Fragmented data
 - Knock on effects of bad data



- Data integration for all ESG
- Better data governance
- More accountability with a single source of data
- Increased data literacy
- Sustainability data follow governance best practices

THE POWER OF BEING UNDERSTOOD
AUDIT | TAX | CONSULTING



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