Effective CSR Data Management

How Software Solutions Can Drive A Sustainable Future

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Glossary of Terms
Corporate Social Responsibility (CSR): For the purpose of this study, CSR encompasses all aspects of sustainability data: environmental, social, and governance. The term sustainability is used interchangeably to refer to the same idea. CSR data refers to all sustainability metrics such as energy consumption, water consumption, waste production, GHG emissions, workforce accidents, and governance structure.

CSR software solutions: Solutions that support the process of collecting, tracking, reporting and analyzing CSR data. The terms CSR data management tool and tool are used interchangeably throughout the report to refer to the same idea.

Environmental Health and Safety (EHS): EHS takes a specific focus on preventing incidents or accidents in the workplace that may affect the health and safety of employees, communities, and the environment. In the U.S., companies are subject to EHS regulations.

Global Reporting Initiative (GRI): A non-profit organization that promotes the process of sustainability reporting. The GRI produces one of the world’s most prevalent standards for companies to use when reporting economic, environmental, social, and governance performance.

Software as a Service (SaaS): A new way of delivering software services where the software is cloud based, programs are hosted centrally and the clients purchase subscriptions.

Stakeholder: A stakeholder is a group that can affect or be affected by a business. Examples include: consumers, investors, employees, managers, civil society, communities, government and business partners.

Sustainability Accounting Standards Board (SASB): A U.S. non-profit with the mission to develop and disseminate sustainability accounting standards to help public corporations disclose material, decision-useful information to investors.
Abstract
In an age when hard data is the foundation for most corporate decisions, for many companies the process of tracking sustainability information is woefully inadequate and out of date. In order to realize the full value of managing sustainability performance, companies should have an efficient system to collect and analyze CSR data. In this study, we review the main market drivers pushing U.S. companies to report sustainability data, identify what sustainability professionals look for in CSR data solutions, assess the current market for CSR reporting tools, and analyze key CSR data management solutions.

The intention of this whitepaper is to provide insight into CSR data management solution suppliers in regards to what their customers are looking for, and offer guidance to CSR professionals looking to best manage the CSR data process. The authors believe that widespread adoption of quality CSR data management is vital to driving sustainable business performance and collective sustainability goals.

About the Authors
The ReScore Project Group is made up of graduates from Columbia University’s M.S. in Sustainability Management program. The team members have backgrounds in data analysis, marketing, and reporting. The team sees transparency and reporting as an integral part of moving towards a sustainable future.

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About this Study
To understand the market for CSR data management tools in the U.S., our team surveyed and interviewed 50 sustainability professionals to uncover the main motivations and mechanisms for tracking and reporting CSR and sustainability data. In parallel to these interviews, the team conducted a literature review and a benchmarking study of CSR data management tools.
Real-time delivery notifications, predictive analytics, and customer location tracking — today, organizations have the ability to track and access vast amounts of internal and external data. Data that allows organizations to stay competitive and make informed decisions. Analyzing accurate and detailed company and market information allows managers to better allocate resources and identify strategic opportunities. Investments in information technology that give insight into day-to-day corporate activities, from tracking shipments to running analytics on the success of marketing campaigns, are commonplace.

On the other hand, investments to track and analyze sustainability data are given a lesser focus, despite the fact that the vast majority of CEOs view sustainability as correlated to performance and important to the future success of their business.1 Just as IT investments help organizations to run more efficiently, sustainability software solutions can help organizations to identify patterns and trends, better understand risks and opportunities, optimize resources, and lower costs.

In this whitepaper, we explore the market and potential for CSR software in the U.S., illustrating the business opportunity for improving CSR data management.

The CSR Reporting Landscape in the U.S.

In the last two decades there has been an exponential growth in the number of companies reporting CSR data.2 Today, disclosing CSR data through a sustainability report is the norm for the world’s largest companies.2 Companies based in Europe have traditionally led CSR disclosure rates due to increased pressure from government regulators and investors; however, U.S. companies have begun to catch up over the last few years. In 2013, a study by KPMG found that 86 percent of the largest U.S. companies disclosed CSR information.3

Of the organizations we surveyed, almost 80 percent are currently tracking or planning to track non-financial data (see Figure 1), a higher rate than Europe’s average.3 Our interviews with representatives from the leading reporting initiatives, CDP and GRI, confirmed that American companies are feeling stakeholder pressure to disclose CSR data.

### Figure 1: Organizations Currently or Planning to Track CSR/EHS Data

![Figure 1: Organizations Currently or Planning to Track CSR/EHS Data](image)

Source: ReScore Surveys & Interviews

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1 93 percent of CEO surveyed by Accenture for the 2013 UN Global Compact CEO Study, agree to the statement that Sustainability is important to the future of their business.

2 According to KPMG’s International Corporate Responsibility Reporting Survey 2011, 95 percent of Global Fortune’s 250 companies disclose CSR data.

3 According to KPMG’s International Corporate Responsibility Reporting Survey 2013, the average reporting rate across European countries is 73 percent.
Most American companies are disclosing some sort of CSR data, however, the quality of data is inconsistent. In 2013, independent auditors assured only 23 percent of U.S. sustainability reports, far below the average of some European countries. In France, for example, almost 80 percent of corporate sustainability reports were assured in the same year.\textsuperscript{iv}

We think that the difference in assurance rates can be attributed to the longer history of CSR reporting in Europe, as well as European stakeholders shifting their focus from getting companies to report to a focus on the quality of the data reported.

**Market Drivers**

Our interviews with sustainability managers revealed many reasons why companies are choosing to track and report CSR data. In the U.S., unlike in many parts of the world, there is no comprehensive federal requirement to track and disclose CSR data. While some companies report because of the pressure from external stakeholders, others are increasingly realizing that tracking and reporting sustainability data is a vital business management tool.

The majority of our respondents replied that there were both external and internal motivations to collect CSR data (see Figure 2).

The main reasons cited by interviewees for tracking and reporting CSR data was to:

- Meet or prepare for regulation and policies set forth by government, stock exchanges, or industry groups
- Satisfy internal and external stakeholders including investors
- Improve internal processes and enhance brand value

**Figure 2: Internal vs. External Incentives to Collect CSR Data**

There are both external and internal pressures to track and report data. But the external pressure comes less from regulators and more from customers looking for us to help them meet their sustainability goals. Most companies focus on ISO 9001 but are moving towards ISO 140001. We feel it is as important to a company to track [sustainability data] as it is financial data.”

- Representative from a major aviation technology firm

The leading explanation for companies that had not yet begun to track and report data was a lack of resources or a lack of perceived return on investment.
Just this year, the European Parliament passed a mandate requiring the disclosure of non-financial data for companies with over 500 employees. In the U.S., the recently enacted Dodd Frank Act requires publicly traded companies to disclose certain issues, such as pay disparity and mineral sourcing. While this is a good start, it lacks the comprehensive approach of the EU. SASB is attempting to bridge the disclosure gap by developing industry standards for CSR reporting. SASB’s goal is to integrate these standards into existing SEC regulation; but in the meantime the U.S. still lacks an all-inclusive reporting regulation.

States and cities have enacted their own sustainability polices which require additional disclosure by companies. In January 2013, California implemented the first Cap and Trade program for greenhouse gas emissions in the U.S. Major cities, including New York and Chicago, have also passed regulation requiring increased disclosure; for example, energy-benchmarking laws mandating buildings over a certain size to disclose building energy use. The lack of comprehensive action at the federal level has created a chaotic regulatory environment for U.S. companies where there is uncertainty about the data that they may need to disclose in the future, and whom they will be required to disclose to. As such, it is not surprising that one of the main reasons companies are tracking CSR data today is to prepare for potential future requirements.

Beyond regulations, companies are feeling pressure from consumers, investors, employees, civil society, and suppliers, to track and report data. In recent years, investors have increasingly turned towards mechanisms like shareholder resolutions to pressure companies to publish sustainability reports. In the U.S., investors filled a record number of shareholder resolutions during the 2014 proxy season with environmental, social, and governance issues making up a majority of proposals filed. In 2013, nearly 70 percent of the S&P 500 disclosed carbon emissions data to CDP, a shareholder led initiative. Retailers are also using their influence to get suppliers to disclose sustainability information. In 2009, the Walmart Sustainability Index incentivized thousands of companies to begin tracking and investing in sustainability and carbon emission reporting. Our interviews found the most common framework that companies follow is the GRI, though a majority of the companies we interviewed reported to more than one framework. While none of the companies we interviewed currently use SASB standards, we see this as an important emerging framework. Figure 3 shows the frameworks reported to most frequently.

Figure 3: Frameworks and Standards Used

![Framework Graph]

Source: ReScore Surveys & Interviews
Market Outlook
The trend over the last decade has been an increased focus on CSR reporting and disclosure as a way to promote sustainable business practices. In the sustainability world, the phrase, “you can’t manage what you don’t measure” has almost become cliché in its use. Through measuring and reporting sustainability data, companies are able to identify risks and business opportunities. For example, buildings using Energy Star Portfolio Manager to track and report energy data have found, on average, a 7 percent savings in energy simply by observing how the building is performing. In a 2011 survey by KPMG, close to half of the G250 companies reported that they had gained financial value from their CSR Reporting.

The practice of sustainability reporting in the U.S. will likely be furthered by state policies, if not federal regulation, and by other initiatives from both the public and private sectors. Today’s businesses typically have an array of IT solutions that help them to run more efficiently and, in our opinion, CSR software solutions are next in line to be considered business critical infrastructure.

CSR Data Management in U.S. Companies
We identified a variation in the level of sophistication of corporate CSR data management strategies at both the strategic and operational level. The discrepancies are partially tied to the large differences in how well CSR is integrated into business operations, and partly as the practice of sustainability reporting is still relatively new.

Corporate Strategies for Managing CSR Data
Our research found five main ways companies manage their CSR data:

1) **Do nothing.** Companies that are not currently tracking data do not use a system.

2) **Utilize readily available office tools (e.g., Microsoft Excel).** A large percentage of interviewees noted that they are currently using Excel or other widely available tools to track data.

3) **Develop internal systems.** Some companies rely on specialized software created for the company by an internal IT department or external consultants.

4) **Acquire CSR add-ons for existing corporate software platforms (e.g., Oracle, SAP).**

5) **Purchase an off-the-shelf or customized software solution.** Refers to commercially available software systems like Enablon, Credit360, Tennaxia, etc.

Most organizations start out using spreadsheets, text documents, and e-mail to collect and report CSR data. A market review published by KPMG in 2011 found that while most organizations start off by using office tools, as organizations become more ambitious in their sustainability goals, they require more robust systems and turn to dedicated solution providers to help set up key performance indicators for measuring CSR performance. This sequence, illustrated in Figure 4, from simple to complex systems seems like a natural progression.
In practice the path may not be as straight forward. One of our main findings was that a large number of U.S. companies continue to use common office tools even when increasing the sophistication of their CSR strategy. Half of the organizations we surveyed use Excel or some combination of Excel and software tools to track, monitor, and manage CSR data (see Figure 5).

“Only one client uses formal software [for CSR reporting]. Other clients use Excel, where lots of time is used crunching and aggregating data from customers.”
- Manager at a large accounting and consulting firm

The U.S. Marketplace for CSR Data Management Tools
The CSR data management market is young with room to grow. Based on our findings, only 29 percent of companies use specialized CSR data management software, such as Credit360, Enablon, or Tennaxia. Another 18 percent use an internally developed solution, created by their IT department or consultants to collect CSR data. The rest of the interviewees stated that they use Excel or a combination of Excel with other systems. See Figure 6 for details.
Barriers to Adoption
We identified several barriers that are keeping managers from investing in comprehensive CSR management tools and services. The first barrier is an apparent misconception or lack of information about the true capabilities of CSR data management tools. Our interviewees identified key features they would like to see in CSR data management tools as well as capabilities that they are missing in their current solution. However, all of the key features mentioned were available in at least one of our benchmarked solutions. Other barriers include the perception that data management tools are an unnecessary expense rather than a potential investment.

Market research conducted by KPMG in May 2012 supports that the market for CSR data management solutions is undeveloped, but will likely be driven by the increasing trend towards sustainability reporting. As KPMG reported, 76 percent of current CSR data solutions have been introduced since 2008, and the remaining 24 percent were introduced between 2005 and 2008.

Since the majority of tools were introduced within the last decade, companies that were looking for tools to assist them in managing complex CSR data in early and mid-2000 may not have been able to find appropriate systems in the market. Therefore, some of these companies have developed their own internal systems, often with the help of specialized consultants. Our research found that many companies still rely on these internally developed older systems even though there are currently available products that can more cost-effectively meet their needs. The lag in the adoption of new software platforms may be due to the sunk cost of the existing systems and the implementation cost of a new system.

Regardless, the U.S. market is using a mix of strategies to track CSR data. Figure 7 below represents what we understand this mix to be.

Figure 7. Market Analysis of CSR Data Management Tools

CSR Data Management Tools
Our conversations with sustainability professionals identified that there is a clear market opportunity for robust CSR data management tools. Several sustainability professionals expressed frustration in the lack of a streamlined process to efficiently collect and review data-points from internal sources. Most interviewees expressed that their organization had yet to find an optimal system to manage and analyze this data. A common gripe among the auditors interviewed was inconsistent data quality, especially for those with clients relying solely on Excel.

“A major issue with using Excel as the default tracking tool is that data is often of inconsistent quality and difficult to audit. Software tools designed specifically for CSR data typically generate more auditable records.”

- Senior associate from major assurance provider
The market opportunity for efficient CSR data software solutions has not gone unnoticed by foreign and U.S. companies alike. Through a review of CSR software research and through our interviews, we identified nearly 50 CSR data management tools currently available in the U.S. These tools can broadly fit into three categories:

1. Simple low-cost spreadsheets or workbooks
2. CSR add-ons to existing corporate software platforms
3. Specialized CSR software systems

Benchmarking CSR Data Management Tools
To further understand the usefulness of CSR software, we chose 16 leading tools to benchmark. Our benchmarking criteria were selected based on our research of the needs expressed by the CSR professionals and auditors interviewed. The benchmarking covered four areas:

1) **Standards.** Most companies publically disclosing CSR data do so in accordance with commonly referenced standards or frameworks (e.g., GRI, SASB, CDP). Therefore, it is important that the software can collect and format the data to align to these standards.

2) **User Friendliness.** Systems that can be customized for users, accessed by mobile or via the cloud, and include training and on-going support, improve the user experience.

3) **Data Collection.** Streamlining the data collection process through features such as the ability to manage workflows, attach supporting documentation, and tracking progress, enhances the data collection process.

4) **Advanced Functionality.** Enhanced features, such as automated data collection from utilities and advanced data visualization, enrich the functionality.

5) **Data Integrity.** Features that improve the quality of the data, for example, including a system to validate or signoff on data increases data reliability.

For a complete list of our benchmark criteria, see Appendix 1.

As Excel remains the most widely used tool for CSR data management, we evaluated Excel against the same criteria as used for benchmarking the CSR solutions. The main conclusion from our benchmarking exercise is that all of the reviewed software systems outperformed Excel. This finding is unsurprising given that the other solutions are designed specifically to manage CSR data.

**Figure 8: Benchmarking Results**

<table>
<thead>
<tr>
<th></th>
<th>Standards</th>
<th>User Friendliness</th>
<th>Data Collection</th>
<th>Advanced Functionality</th>
<th>Data Integrity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tier 1 Average</td>
<td>⬤</td>
<td>⬤</td>
<td>⬤</td>
<td>⬤</td>
<td>⬤</td>
</tr>
<tr>
<td>Tier 2 Average</td>
<td>⬤</td>
<td>⬤</td>
<td>⬤</td>
<td>⬤</td>
<td>⬤</td>
</tr>
<tr>
<td>Tier 3 Average</td>
<td>⬤</td>
<td>⬤</td>
<td>⬤</td>
<td>⬤</td>
<td>⬤</td>
</tr>
<tr>
<td>Excel</td>
<td>⬤</td>
<td>⬤</td>
<td>⬤</td>
<td>⬤</td>
<td>⬤</td>
</tr>
</tbody>
</table>

*Source: ReScore Benchmarking Research*
data. However, it is surprising that many large U.S. companies still rely on Excel as their main data management tool.

**Figure 9: Ranking of CSR Data Management Tools**

<table>
<thead>
<tr>
<th>Tier 1:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Tennaix</td>
<td></td>
</tr>
<tr>
<td>CloudApps</td>
<td></td>
</tr>
<tr>
<td>Enablon Sustainability Management Platform</td>
<td></td>
</tr>
<tr>
<td>CrEdi360 Sustainability Software</td>
<td></td>
</tr>
<tr>
<td>CSRware</td>
<td></td>
</tr>
<tr>
<td>ProcessMAP</td>
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</table>

<table>
<thead>
<tr>
<th>Tier 2:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Verisae/Hara</td>
<td></td>
</tr>
<tr>
<td>Locus Technologies</td>
<td></td>
</tr>
<tr>
<td>Workiva</td>
<td></td>
</tr>
<tr>
<td>SAP Business Objects Sustainability Performance Management</td>
<td></td>
</tr>
<tr>
<td>Oracle Environmental Accounting and Reporting</td>
<td></td>
</tr>
<tr>
<td>Ibystain</td>
<td></td>
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</table>

<table>
<thead>
<tr>
<th>Tier 3:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Oracle Business Intelligence Enterprise Edition</td>
<td></td>
</tr>
<tr>
<td>IHS the Sustainability Reporting Starter Kit for Oracle Hyperion Financial Management</td>
<td></td>
</tr>
<tr>
<td>OneReport</td>
<td></td>
</tr>
<tr>
<td>Carbon Management Tools – e3CAT, e3Clip and e3 ECM</td>
<td></td>
</tr>
</tbody>
</table>

*Source: ReScore Benchmarking Research*

There is a substantial difference in functionality between the lowest ranked CSR data management solutions and those at the top. The different solutions offer different levels of complexity and the ability to customize workflows and KPIs. Additionally, many software solution providers offer consulting services to help their clients understand the true impact of their business and establish ways to track and report this information.

**Figure 10: Average Performance of CSR Add-ons Against Specialized Systems**

<table>
<thead>
<tr>
<th></th>
<th>Standards</th>
<th>User friendliness</th>
<th>Data Collection</th>
<th>Advanced functionality</th>
<th>Data Integrity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Average Add-on to EMS</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Average Specialized</td>
<td></td>
<td></td>
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</tr>
</tbody>
</table>

*Source: ReScore Benchmarking Research*

“Software is only part of the solution. Our team helps the client to define stakeholders, materiality and key performance indicators. Together we examine their unique objectives and build a software-enabled CSR management strategy.”

- Bernard Fort, CEO of Tennaxia

Three of the tools benchmarked, Credit 360, ProcessMAP, and CSRware, met all of the outlined criteria. However, given the high scores of all the solutions in Tier One and the notable scores of Tier Two, we do not feel like this benchmarking establishes clear market leaders. Our research suggests that CSR managers should evaluate the specific needs of their organization in addition to examining independent research when choosing an appropriate CSR software solution.

**CSR Data Management Tools and Integrated Reporting**

Our research focuses on the systems’ ability to assist in the CSR reporting track, and to date the adoption of integrated reporting has been slow. The International Integrated Reporting Council’s (IIRC) database of integrated reports has only 19 entries for 2013. However, the integrated reporting process has great potential and forward-looking CSR managers may consider data management systems that can handle integrated reporting.

For the purpose of integrated reporting, the add-ons for existing Enterprise
Management programs (e.g., Oracle, SAP) might be considered the most apparent choice. However, these systems may lack features sustainability professionals are demanding.

Approximately half of the CSR data management solutions reviewed have the ability to integrate with other corporate systems (e.g., Human Resources, Accounting Management systems). However, the benchmarked solutions often have limitations on the types of systems with which they can interface. In addition, integration with other systems often requires additional collaboration of the software, potentially making implementation more costly, complex and time-intensive.

**Figure 11: Share of Specialized Systems that have the Ability to Integrate with Other Corporate Systems**

While integrated reporting may be a long way down the road, the ability to integrate with other corporate systems is high on the CSR managers’ "wish list" of features, and we foresee this will become a more prevalent feature. Another sought after feature is the ability to auto-populate data from third-party vendors, such as electricity information from utility providers. This feature along with the integration with corporate systems reduces the need for manual data input helping to streamline the reporting process and reduce the potential for input error.

Other features interviewees want is the ability to export data into various outputs and reports, as well as the ability to send internal notifications to data collaborators and respond to corrective actions. Multiple sustainability professionals also seek improved customization, such as the ability to adapt to various reporting frameworks, and access to clear definitions of the metrics upon implementation, in order for employees to accurately track and report the correct data.

Source: ReScore Benchmarking Research
Concluding Remarks
In order to make appropriate strategic business decisions based on non-financial performance, CSR managers need accurate and timely CSR data. For any organization that has embedded sustainability into corporate strategy, improving the quality of data can directly affect the bottom-line. In addition, CSR data management tools tend to improve process efficiency, saving time and money for its users. We believe that more companies would benefit from considering the added value CSR data management tools can provide to their strategy. Overall:

1) There is a low adoption of CSR data management tools
2) The CSR software tool market is highly competitive
3) CSR managers lack confidence in the ability of CSR software to address their needs
4) Many CSR software tools have the features and capabilities CSR professionals want

Recommendations to CSR Software Providers
As sustainability issues continue to gain acceptance as central management issues, the need for refined tools to streamline the data management process will continue to grow. Similarly, corporate sustainability strategies are in an evolutionary phase and as companies track more complex data, systems will become more sophisticated. CSR data management providers who offer solutions that enhance data quality, align to sustainability reporting frameworks, and provide a user-friendly approach, can gain an edge. CSR software providers should:

1) Focus on supporting clients in understanding and improving their CSR strategy
2) Prepare for an integrated reporting focus
3) Identify cost-effective auto-population and integration functions

Recommendations to CSR Managers
For companies that are seeking the appropriate CSR SaaS to manage their unique organizational needs, it is important to first consider the types of metrics they want to measure and which solution providers can best help them set-up their specific KPI’s. CSR managers should:

1) Develop the internal business case for investing in CSR data management platform
2) Analyze the business process to identify the right level of complexity and needed customization from the tool
3) Find a trusted CSR partner
Endnotes

iv Ibid
xv O’Rourke, J. (2011). “Getting to Green: 3 Steps for Preparing Enterprise Data for Sustainability Reporting”. Data Management, Sustainability
xix Ibid