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Promoting ESG Awareness
+ Risk Literacy in SMEs

Module 02

ESG ONBOARDING, VISION & RESPONSIBILITY

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Agenda Module 2

- **01** ESG kick-off workshop as strategic starting point
- **02** Setting up the ESG team and defining key roles
- **03** Involving internal stakeholders and departments
- **04** Onboarding decision-makers with interactive formats
- **05** Building ESG awareness and shared strategic direction
- **06** Structuring responsibilities and steering mechanisms

ESG Onboarding
– Kick-Off & Design of Project

01 Conduct Kickoff Workshop

02 Define ESG Core Team

03 Set Key Project Milestones

04 Perform Industry & Competitor Benchmarking

05 ESG Onboarding for Decision Makers & Leadership Team

ESG Start Workshop

What is the purpose of the ESG kick-off workshop?

- The ESG kick-off workshop is the central tool for revealing the status quo of ESG activities within the company—and for systematically clarifying responsibilities, data sources, and next steps.
- It is particularly effective when designed as an interactive format involving relevant departments, roles, and stakeholders.
- A typical workshop lasts one day – compact, practical, and forward-looking.

ESG Start Workshop

Key content of the ESG kick-off workshop

- **Make existing ESG structures visible** - What data, initiatives, and responsibilities already exist? Who is responsible? What works?
- **Appoint an ESG core team**
- A small steering team (usually 2–3 people) coordinates the analysis and liaises with specialist departments and management.
- **Identifying relevant Stakeholders -** Who provides information? Who is affected by ESG or actively involved in shaping it?
- **Assess the information situation** - Reports, guidelines, KPIs, processes – compile, structure, and evaluate internal sources
- **Identify key ESG issues** - Based on ESRS & materiality analysis: Which topics are actually relevant for our company?

ESG Start Workshop

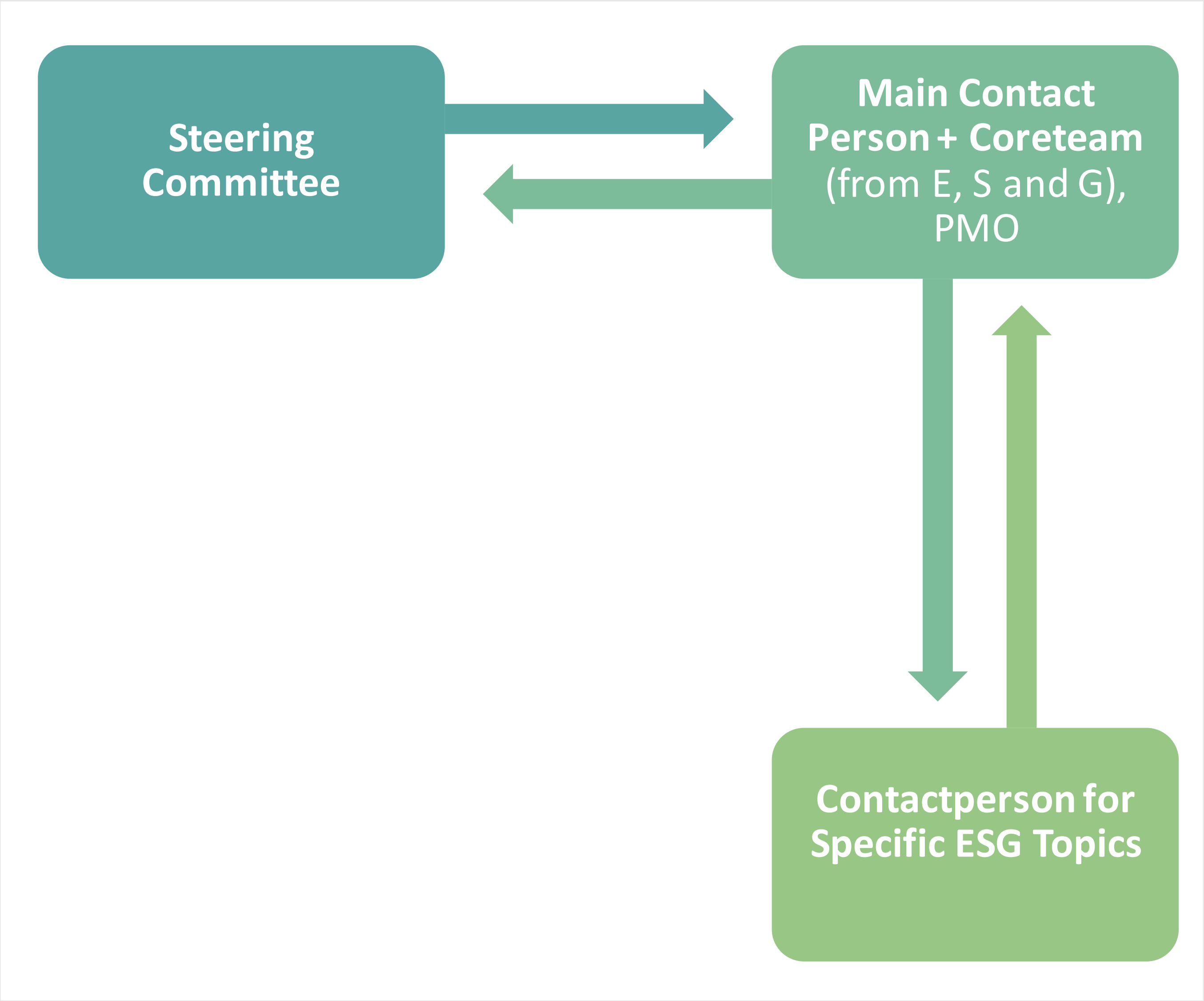
Typical Roles in ESG Onboarding

- **Human Recources:** Diversity, Inclusion, Workculture
- **Procurement:** Supply Chain Data, Risks in Precursors
- **Production:** Sustainable Manufacturing Processes, Ressource Use
- **Compliance / IT / Data Protection:** Specific Governance-Topics
- **C-Level:** Strategic Prioritization, Ressource Allocation, Setting Direction

Success factor: A clear Start, shared understanding

A well prepared ESG Kick-off workshop provides **Orientation**, builds **internal Acceptance** – and is often the decisive moment for transforming ESG from a marginal issue to a **Top-Level Priority**.

Who can I talk to? Construction of an ESG-Team



ESG Team and Relevant Internal Contributors to ESG Topics (Toolbox)

Role / Position	Knowledgeable about / responsible for topics within the following areas									
	E (Environmental Topics)	S (Social Topics)	G (Governance Topics)	Suppliers & Value Chain	Certifications / Audits	Marketing / ESG Communication	Customer / Client ESG Topics	ESG-related Financial KPIs	ESG Reporting	Remarks / Notes

ESG Project Milestones

Milestone No.	Milestone Title	Description	Expected Timeline (Month)
1	Project Kick-off & Team Setup	Define key project steps, form ESG team, and align communication plan.	Month 1
2	Gap Analysis Workshop	Evaluate ESG gaps, identify key topics and determine priorities.	Month 2
3	Stakeholder Mapping & Engagement	Identify internal and external stakeholders and engage them.	Month 2
4	Double Materiality Assessment	Perform double materiality analysis (inside-out & outside-in).	Month 3
5	Definition of ESG Strategy & Objectives	Set long- and mid-term ESG goals, define focus areas and governance.	Month 4
6	Implementation of ESG Programs & KPIs	Launch ESG initiatives with clear KPIs and accountability.	Month 5–6
7	Monitoring and Adjustment (PDCA Cycle)	Monitor implementation with sustainability management software.	Month 7–8
8	First ESG Report delivered	Deliver first report.	Month 9
9	Branding Check completed	Validate ESG integration into branding.	Month 9

ESG Onboarding Workshop for C-Levels

The Goal of this measure

An interactive workshop helps top management understand ESG not just as a regulatory requirement, but as a strategic area of action.

An initial stimulus and a structured SWOT analysis create a shared understanding of opportunities, risks, and required resources. Onboarding ensures that ESG is embedded and actively supported at the C-level—a prerequisite for implementation and visibility.

ESG Onboarding Workshop for C-Levels

Typical Construction of a ESG-Onboarding

- **Impulse (30 Min.)**
  Current ESG requirements (CSRD, Supply Chain Act, CSDDD) and their direct relevance to the company – clear, fact-based, strategically prepared.
- **Interactive Workshop (60 Min.)**
  SWOT analysis in the ESG context: Identify opportunities and risks for the market, customers, supply chains, product development, and access to capital.
- **Putting strategic Questions in the Center**
  How does ESG affect our business Strategy?
  Which stakeholders expect Visibility?
  How can we make ESG a driver of innovation?

ESG Onboarding Workshop for C-Levels

Impulse & Tools

- **Toolset Onboarding Decision Makers -** Overview of the company and ESG issues
- **Scenario-Technology -** Developing concrete visions of the future – e.g., regarding new customer requirements, ESG-based competition, or regulatory pressure.
- **Nightmare Competitor -** Competitive analysis with a focus on ESG: How would a “more sustainable competitor” threaten our position?
- **Brand Visibility Check -** How visible is ESG within the company? What signals are being sent to customers, applicants, and the public?

ESG Onboarding Workshop for C-Levels

Target vision at the end of the workshop

- C-level management is familiar with the relevant ESG drivers
- Initial ESG SWOT analysis for the company's own business model is available
- Clarity regarding internal responsibilities and strategic to-dos
- Positive attitude toward ESG initiatives established

Onboarding internal Decision Makers

1. Market & Competition

- Benchmark ESG activities of key industry peers
- Understand best practices in Industry
- Analyze ESG rankings and platform visibility (e.g., EcoVadis)
- Identify strategic positioning opportunities through ESG

2. Direct & Indirect Impact

- Understand regulatory obligations (CSRD, LkSG, Taxonomy)
- Assess financial exposure (ESG-linked credit terms)
- Indirect influence: customer expectations, supply chain pressure
- Anticipate influence from banks, NGOs, media and civil society

3. Risks, Opportunities & Business Model

- Identify ESG-related risks: physical, transitional, reputational
- Leverage ESG-driven business model innovation and cost saving opportunities
- Tap into financing and branding opportunities
- Define top 5 material ESG topics for your organization

4. Team, Resources & Results

- Define ESG roles and responsibilities internally
- Estimate resource needs: budget, staff, systems
- Align with change drivers: training, communication, Success Stories
- Plan short-, mid- and long-term ESG outcomes

List of Internal Stakeholders Template
Stakeholder Analysis

Stakeholders	Interest in the project	Influence on the project	Contact person for ESG topic
Insert name of stakeholder group or name			
For example., Manager, sales team, shareholder	High	High	Compliance - Person AA
For example., Works Council	Medium	Medium	Risk management - person XX
Insert name of stakeholder group or name	High	High	Circular economy
Insert name of stakeholder group or name	Low	Low	Human Capital – Person YY
Insert name of stakeholder group or name			
Insert name of stakeholder group or name			

Internal Stakeholder Analysis - Transfer

High

Stakeholder Interest

Low

Continuous Information

- Insert name of stakeholder group or stakeholder
- Insert name of stakeholder group or stakeholder
- Insert name of stakeholder group or stakeholder

Working Together

Observe

Maintaining Trust

Low

Influence Of Stakeholders

High

Stakeholder Interest

- contact name
- contact name
- contact name

ESG Onboarding for Holistic Change

ESG onboarding does not end with workshops or individual measures—it requires a holistic view of changes within the company.

The 4Q model helps to systematically address individual, cultural, competency-related, and structural aspects.

The four Perspectives of an effective ESG-Onboarding

INSIDE – INDIVIDUAL
(Mindset)

Focus: Values, motives, fears, beliefs. Key question: "Why is this important to me?"

Goal: Raise awareness, build acceptance, and create personal commitment

Measures: Communication, participatory workshops, emotional anchors

INSIDE – COLLECTIVE
(Culture)

Focus: Shared standards, vision, organizational climate. Key question: "How well does ESG fit with our culture?"

Goal: Anchoring ESG in our vision, language, and collective self-image

Measures: Mission statement workshops, culture checks, joint values work

OUTSIDE – INDIVIDUAL
(Competence)

Focus: Skills, behavior, willingness to learn

Key question: "What new things do I need to learn and be able to do?"

Goal: Developing ESG-relevant skills and mindsets

Measures: Training, coaching, ESG-specific training modules

OUTSIDE – COLLECTIVE
(Processes, KPIs, Organisation)

Focus: Structures, systems, key figures

Key question: "What needs to be adjusted within the company?"

Goal: Effectively integrate ESG into processes and management

Measures: ESG KPIs, software solutions, adjustment of reporting and management systems

Takeaway: The 4Q model provides a proven basis for tackling all levels of change in a structured manner and embedding ESG sustainably within the organization.

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