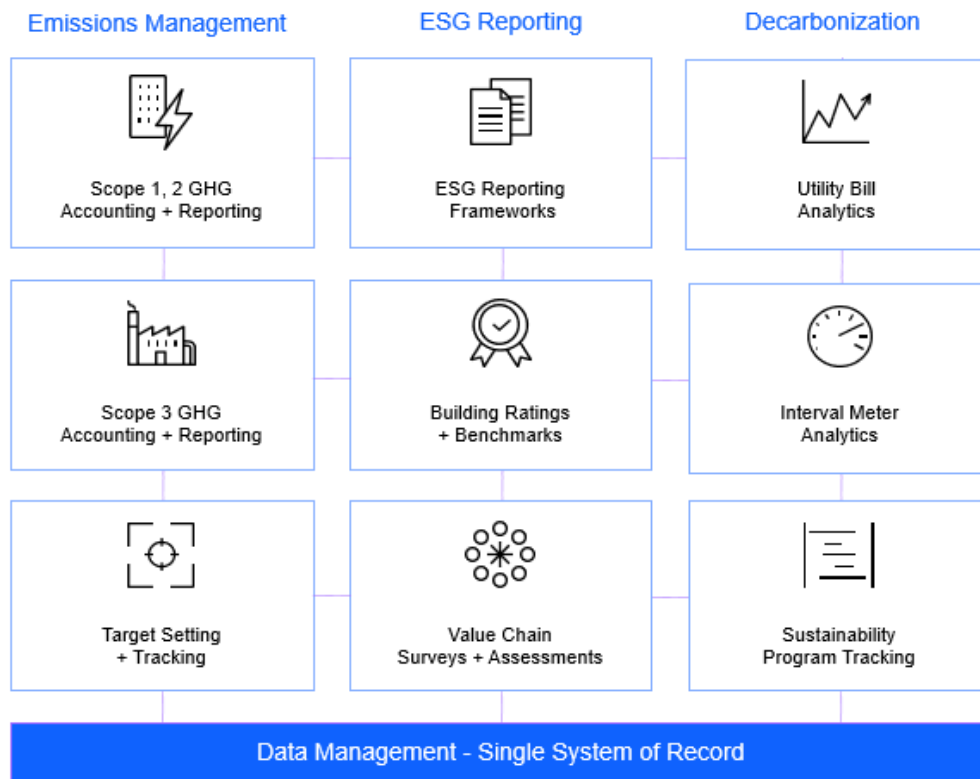


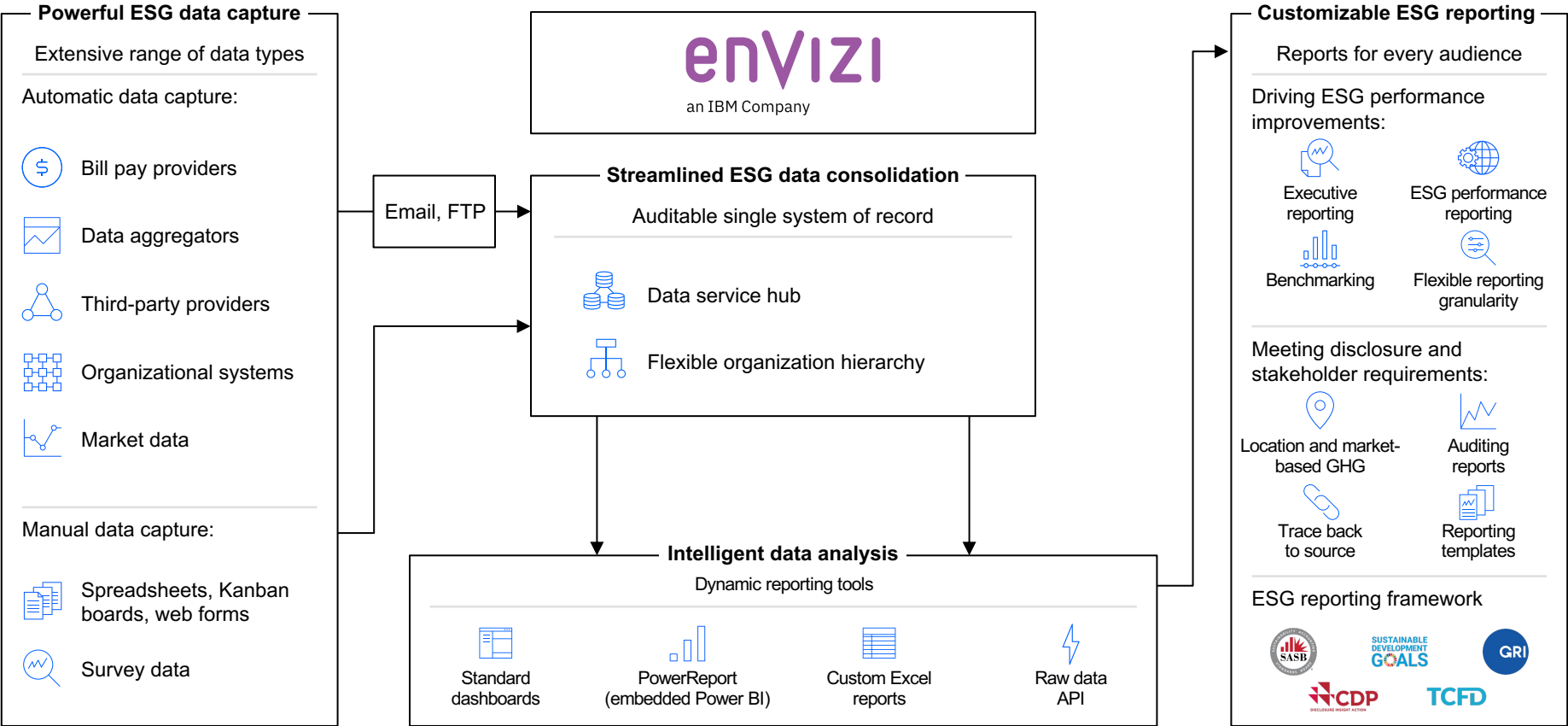
# Envizi Implementation Project Walkthrough

In the context of an Envizi  
Project ....

# The Envizi software

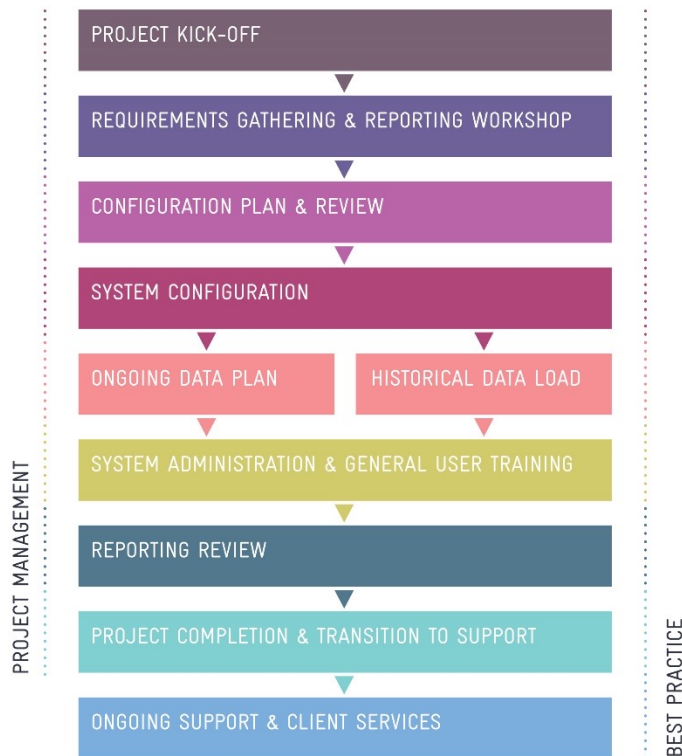


# Envizi data flow



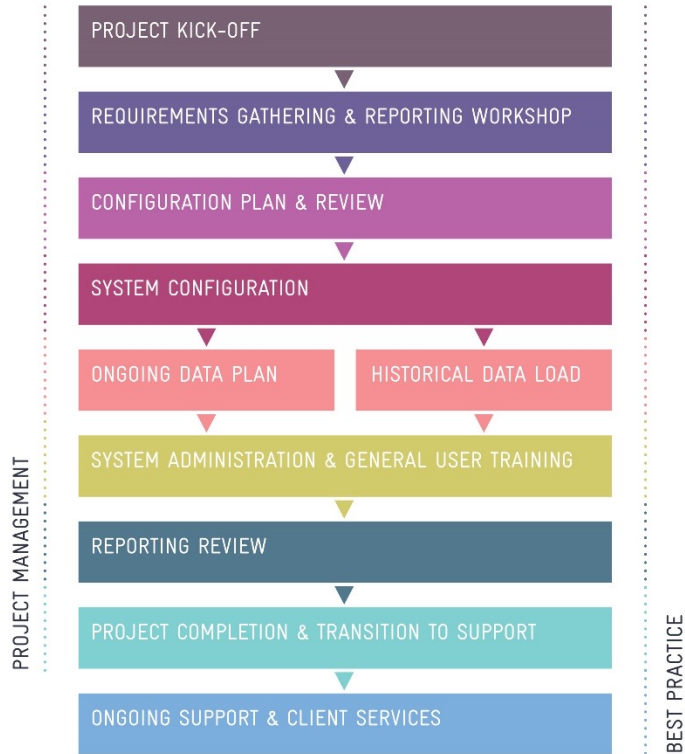
# Envizi projects

- Envizi is a 'Software as a Service' solution and does not require a large-scale, SDLC software project approach.
- The focus of an Envizi project is to implement the software. We are not specialized ESG consultants.
- You will see a limited focus on hard core technical skills here. The focus is on ESG knowledge, Envizi functionality, the data, and how all of that comes together.
- Our primary stakeholders are businesspeople with mixed levels of IT, software and project experience.



# Implementation Walkthrough

# Envizi implementation methodology



## Overview

- We have developed this methodology over the last 10yrs+ as an optimized approach to implementing Envizi.
- A Lean approach to implementation
- The focus is on configuration, not customization
- Primary project team is a Project Manager and Lead Consultant
- Typical duration (not effort) of a project is 4 – 6 months (subject to scope and complexity)
- The core implementation supports a number of Envizi modules. Only a handful require specific implementation activities beyond the core work described.
- As much, if not more, work goes into guiding, supporting and advising the client as goes into actual setup activities.

# Envizi implementation methodology



**Objective:** Initiate project. Establish project parameters and protocols.

**Overview:** Internally, mobilization of the project team. Externally, a Project Kick-Off meeting with the client project manager to confirm the project approach, protocols and governance, review the project's scope and commence the preparation for the Requirements Gathering and Reporting Workshop(s).

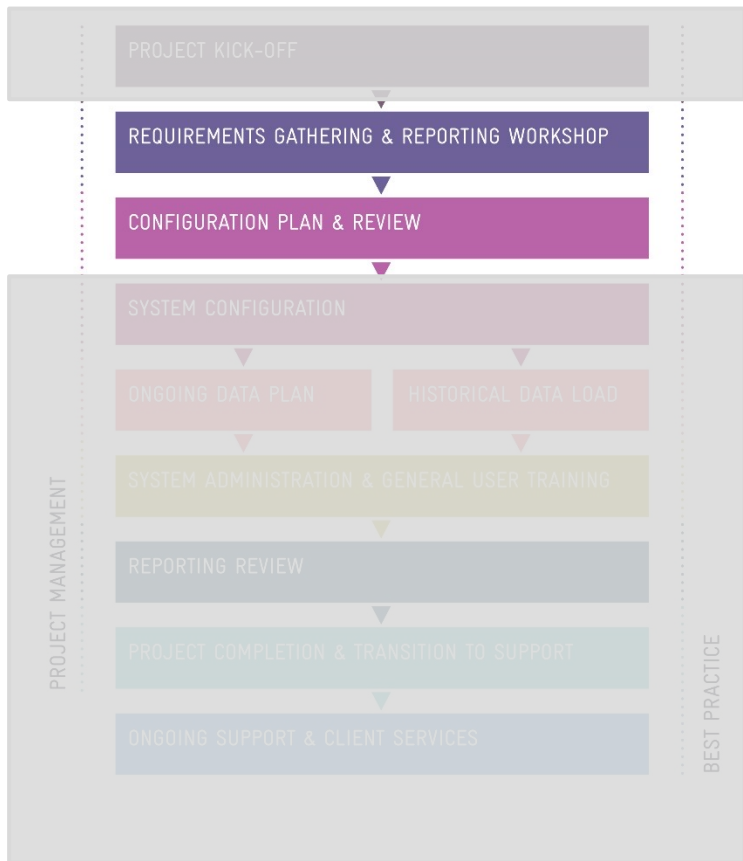
**Client Resources:** Project Manager

**Inputs:** sales to services handover, client proposal, SOW, etc.

**Outputs:** project kick-off deck, requirements gathering workshop preparation workbook (and guide)



# Envizi implementation methodology



**Objective:** Extract clear requirements that inform the implementation.

**Overview:** A comprehensive workshop(s) to addresses the following:

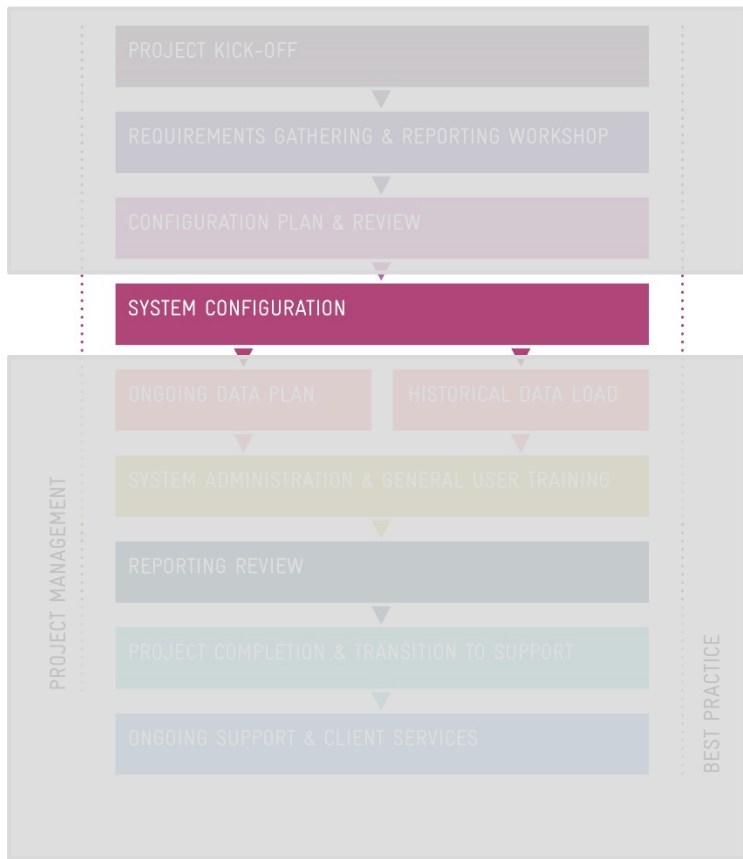
- Platform overview and key technology concepts.
- Confirm scope - energy sources, emissions and other environmental measures to be tracked.
- Detailed requirements gathering using the Requirements Gathering and Reporting Workshop Preparation Workbook
- Review of the Master Data Matrix (MDM) template.

**Client Resources:** Project Manager, nominated system owners, data owners, business stakeholders.

**Inputs:** client proposal, SOW, etc. requirements gathering workshop preparation workbook

**Outputs:** configuration plan, project plan, MDM

# Envizi implementation methodology



**Objective:** Configure the platform hierarchy as per the client MDM

**Overview:** System configuration includes:

- Creating account styles for the different data types in scope
- Configuring Envizi to reflect organizational structure and reporting hierarchy
- Load all location meta-data
- Configure accounts for all identified data types

**Client Resources:** Project Manager, nominated system owners

**Inputs:** data loading deck, MDM, configuration plan, account style and factor template, login creation template, setup and data loading templates

**Outputs:** configured Envizi tenant, show and tell session

# Envizi implementation methodology



**Objective:** Determine and implement methods for capturing data moving forward in time

**Overview:** Establish ongoing data capture processes via;

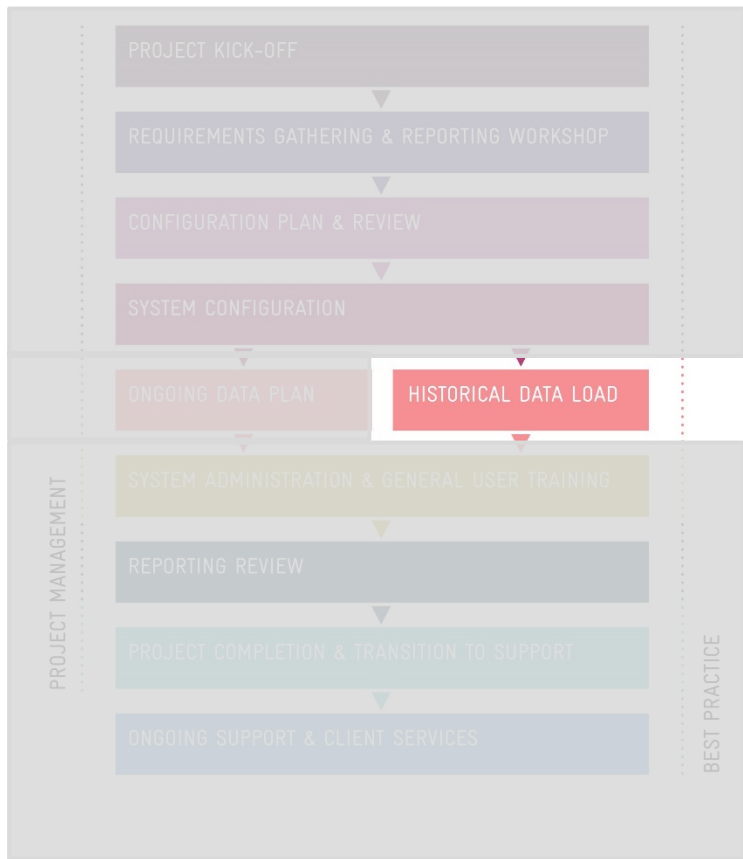
- A comprehensive data mapping exercise that identifies all sources, formats and suppliers of energy and emissions data
- Opportunities for automation of data collection are identified and data connectors implemented
- The Ongoing Data Plan (ODP) is created and agreed as the method for your organization to manage data

**Client Resources:** Project Manager, nominated system owners

**Inputs:** MDM, configuration plan, sample data files

**Outputs:** data connector design document(s), data connector(s), ODP, ODP sign-off document, data connector matrix, letter(s) of authority

# Envizi implementation methodology



**Objective:** Migrate any existing (historic) data

**Overview:**

- Review existing data formats and confirm any manipulation required in preparation for upload into Envizi
- Load and verify the data using data integrity and QA reports
- Reconcile for completeness and accuracy of uploaded data

**Client Resources:** Project Manager, nominated system owners

**Inputs:** historical data template, client source file(s)

**Outputs:** historical data tracker, historical data load reconciliation report

# Envizi implementation methodology



**Objective:** Enable client users

**Overview:** Envizi's standard practice is to provide training for nominated System Administrators and General Users.

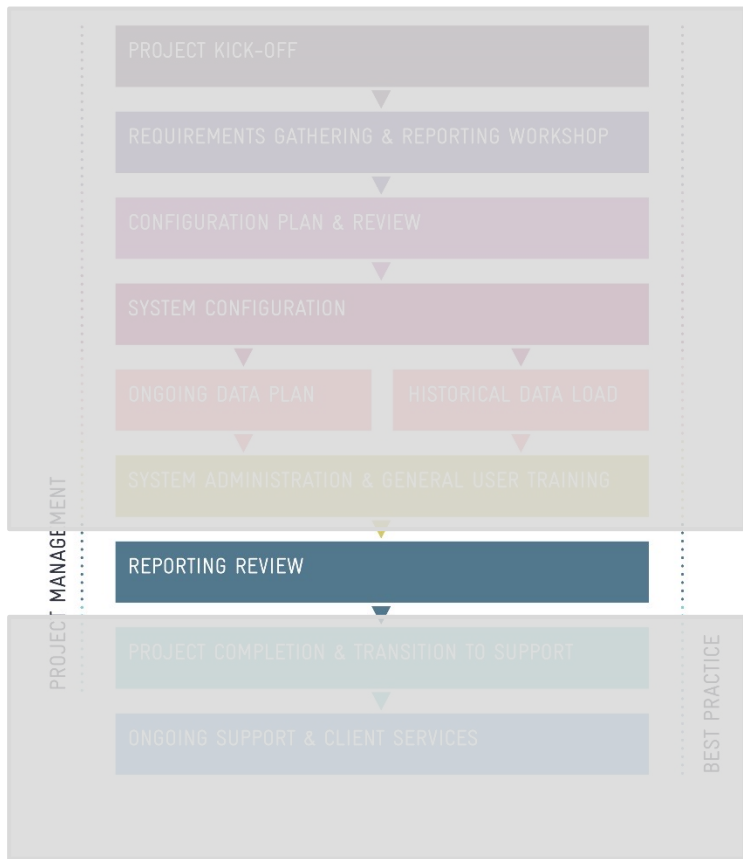
- Initial training is provided online for the different types of users.
- A follow-up facilitated session is provided to the nominated System Administrator(s) during the implementation consolidate the knowledge learnt to-date and review best practice activities to manage and maintain Envizi for their organization.

**Client Resources:** Project Manager, nominated system administrators and general users

**Inputs:** system administrator training deck

**Outputs:** access to online training, access to knowledge base, training evaluation form

# Envizi implementation methodology



**Objective:** Confirm reporting requirements met and share best practices

**Overview:** A reporting review session is held to match the reporting requirements against Envizi capabilities.

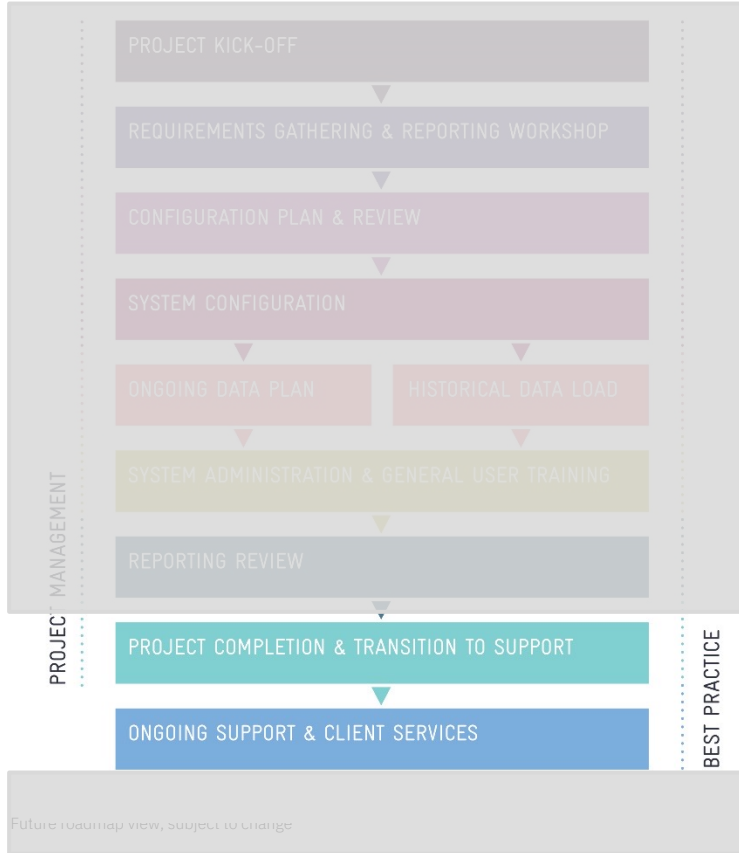
- Review the best practice reports available relevant to client's requirements
- Identify any additional reporting requirements and determine the most suitable method to meet these requirements. This may be a combination of tailoring existing PowerReports or development of new PowerReports
- Build, test and deliver any custom reports (if in scope)

**Client Resources:** Project Manager, system owners

**Inputs:** requirements gathering workshop preparation workbook, configuration plan, sample reports

**Outputs:** Reporting review deck, reporting review outcomes document

# Envizi implementation methodology



**Objective:** Cleanly close out the project

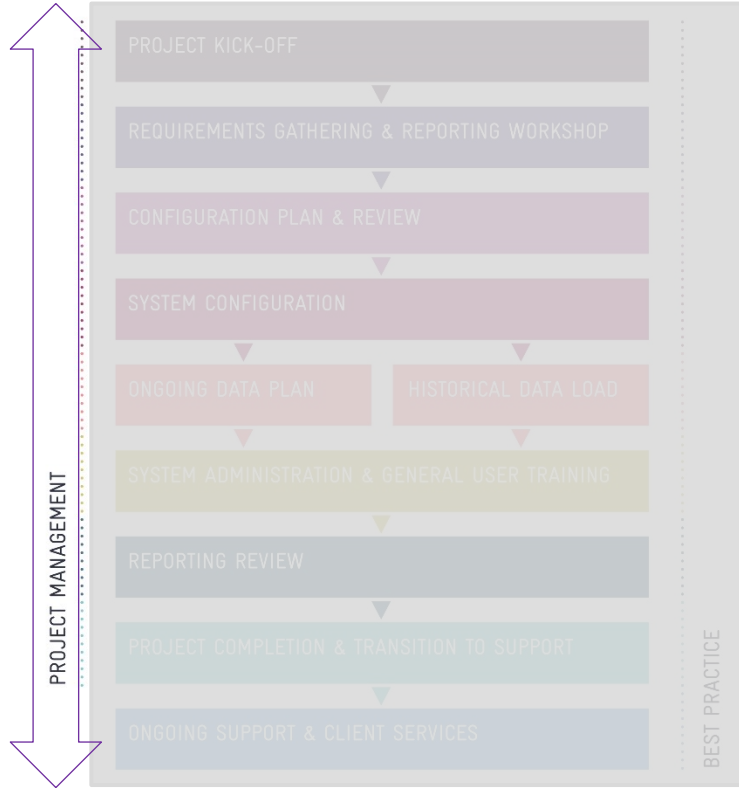
**Overview:** Upon completion of the implementation project, we schedule a meeting to confirm all deliverables are completed and formally transition the client to our ongoing support team. During this meeting a full understanding of the support process is communicated to client stakeholders. This includes methods for contacting the Help Desk, the call logging process, call resolution process, escalation details, service levels, and call closure procedures.

**Client Resources:** Project Manager, system owners

**Inputs:** completion of all project activities

**Outputs:** transition to support document

# Envizi implementation methodology



**Objective:** Successful governance and delivery of the project

**Overview:** Project management occurs throughout the project. The project manager leads external activities such as project kick-off and status meetings, and supports others such as workshops, training, etc.

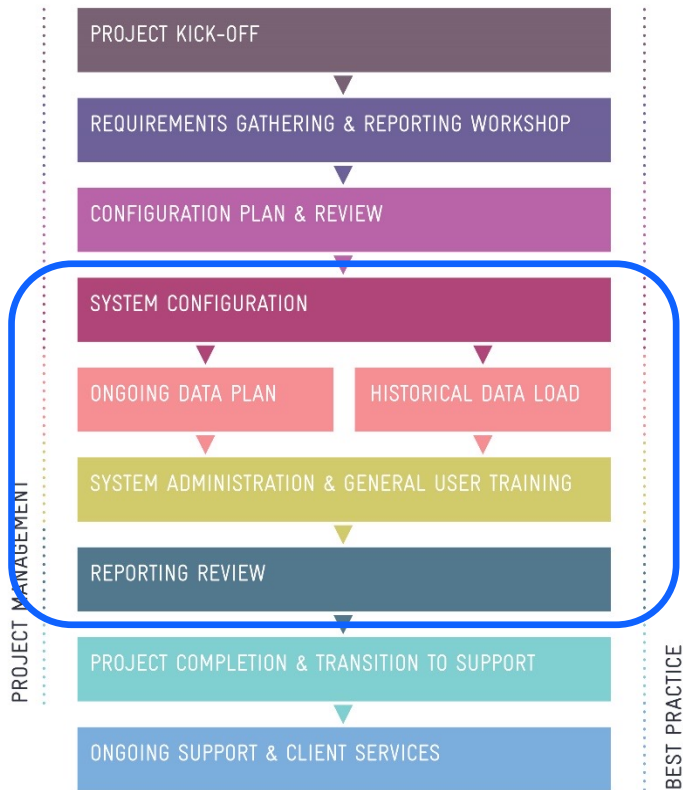
**Client Resources:** Project Manager, system owners

**Inputs:** client feedback on the project plan, discussions from project status meetings

**Outputs:** project plan, issue register, risk register, generic sign-off template, resource plans, project status reports



What are we learning as  
part of workshop



## System Configuration:

- Configuring Envizi to reflect organizational structure and reporting hierarchy
- Load all location meta-data
- Configure accounts for all identified data types

## Ongoing Data plan:

- Opportunities for automation of data collection are identified

## Historic Data load: Migrate any existing (historic) data

- Review existing data formats and confirm any manipulation required in preparation for upload into Envizi
- Load and verify the data using data integrity and QA reports
- Reconcile for completeness and accuracy of uploaded data

## System Administration & General User Training

- Managing Groups / locations / Accounts
- User management
- Setting Organization / User interface / data management preferences

## Reporting Review:

- Custom report requirements / process to create

# Thank You

