

Business & Product Vision

What You Actually Sell [🔗](#)

You don't sell ESG reporting.

You sell **clean, verified, unified ESG data** — the *foundation* for anything else.

Bloom Technologies: The ESG Data Infrastructure Layer [🔗](#)

What It Does [🔗](#)

“We connect, clean, and consolidate your ESG data — so you can finally use it.”

- **Integrates across siloed tools** (SAP, Workday, QuickBooks, spreadsheets)
- **Normalizes messy, unstructured data** into ESG-aligned formats
- **Annotates with source metadata, timestamps, and ownership**
- **Exports into:**
 - Power BI / Tableau (for general analytics)
 - Watershed / Persefoni / Workiva (for ESG-specific reporting, if applicable)

Why This Matters [🔗](#)

Most companies — especially mid-market — already *have* ESG data. But:

- It's buried across systems
- It's inconsistent and unverified
- And it takes **weeks** to prep for reporting

That's your wedge:

“If you're spending weeks tracking down data just to get started... we solve that.”

Who It's For [🔗](#)

- **Mid-size companies** with light or voluntary reporting needs (no budget for Watershed or Workiva)
 - Use Bloom + Power BI/Tableau to analyze and report
- **Larger companies** already using ESG platforms
 - Use Bloom as the middleware that feeds clean data into Watershed, etc.

How It Works (Simplified Architecture) [🔗](#)

1. Connect systems

- OAuth for Google Sheets / Excel
- ETL pipelines for SAP / Workday / QuickBooks

2. Normalize & verify

- Map raw data to ESG fields (e.g., "Air Travel Miles" → "Scope 3, Category 6")
- Auto-flag missing values, outdated records, duplicates
- Log source + timestamp

3. Sync or Export

- Push to BI tools for flexible analysis
- Sync to ESG platforms for formal reporting
- Download traceable datasets for auditors

Positioning Statement [🔗](#)

“Bloom is the ESG data foundation layer — we don’t replace your ESG platform or BI tool. We make sure you have clean, verified ESG data to feed into whatever system you choose.”

Strategic Advantages [🔗](#)

Feature	Why It Wins
✓ Clean ESG data, out of the box	Most ESG platforms assume it’s already clean
✓ No-code setup	Sustainability teams don’t have engineers
✓ Interoperability	Works with Power BI, Tableau, Watershed, etc.
✓ Insight-ready	Adds light flags + traceability before you even analyze
✓ Affordable wedge	Solves a narrow, painful problem for cheap

Where Bloom Fits: The Normalization Layer Beneath the ESG Stack [🔗](#)

For Small and Medium-Sized Enterprises (SMEs) [🔗](#)

Their problem:

They don’t need (or can’t afford) \$30K+ ESG platforms like Watershed, Workiva, IBM Envizi, or Microsoft Cloud for Sustainability.

What they *do* need:

- To wrangle ESG data from Workday, SAP, spreadsheets, QuickBooks, etc.
- To stop doing it manually in Excel
- To get clean, normalized data that they can analyze in Tableau, Power BI, Google Looker, or even export for voluntary disclosures

What we offer:

“You don’t need a giant ESG suite. We give you clean, standardized ESG data in one place — ready to analyze or report however you want.”

Bloom becomes:

- A **cheaper, lighter-weight alternative** to ESG platforms for SMEs
- The **foundation** that lets you DIY reporting with BI tools or ESG templates
- Something that **reduces time, complexity, and mistakes** before reporting even begins

For Enterprises & ESG-Mature Orgs [↗](#)

Their problem:

They're locked into one ESG platform (e.g., Persefoni, Watershed) but:

- Still struggle with fragmented data collection and normalization
- Can't easily switch platforms or compare vendors
- Spend too much time on pre-reporting wrangling
- Face internal pushback when switching software

What we offer:

“We give you a single, normalized ESG dataset that flows cleanly into *any* reporting tool. No more redoing data pipelines every time you switch providers.”

Bloom becomes:

- The **middleware that abstracts away fragmentation**
- A **portable ESG data layer** — enabling platform switching without rework
- A **buffer between raw systems and reporting tools**, making downstream audits, platform transitions, and disclosures easier

Strategic Framing: What Makes Bloom Different [↗](#)

Feature	Bloom	ESG Platforms (Watershed, Workiva, etc.)
Normalizes fragmented ESG data	✔ Core focus	✔ Required, but buried under other features
Offers insights or traceability	✔ Lightweight, pre-analysis layer	✔ Deep, but tied to reporting workflow
Requires engineering setup	✘ No — zero-code, guided onboarding	✔ Often requires IT or data team support
Reporting engine	✘ Use Power BI / Tableau / export anywhere	✔ Native, but expensive & rigid
Cost & complexity	● Light, affordable	● Heavy, expensive
Flexibility / vendor neutrality	✔ Any BI tool or ESG suite	✘ Locked-in ecosystem

Final Positioning Statement (for deck/website/internal doc) [↗](#)

“Bloom is the ESG data normalization layer. We make it easy to clean, verify, and structure your ESG data — so you can use it with whatever tools you choose. For SMEs, we reduce cost and complexity. For enterprises, we reduce lock-in and labor.”

Refined Target Segment: Companies with Reporting Obligations (Not Just Any SME) [🔗](#)

Let's be clear:

We're not building for every SME.

We're building for **companies of any size that have ESG reporting obligations** — even if they're only 25 or 50 people.

These may include:

- Smaller investment firms with LP reporting mandates
- Private companies with sustainability-linked loans
- Certified B Corps or impact-driven teams
- Mid-sized enterprises affected by CSRD, SEC, or voluntary disclosures

What matters isn't the size — it's the **reporting need**.

Platform Usage by Company Type [🔗](#)

Small & Medium Enterprises *with* Reporting Obligations [🔗](#)

Use Case:

- Need clean ESG data to generate reports
- No dedicated engineering team
- Don't want to pay \$50–150K for Watershed or Workiva
- Prefer DIY reporting in Tableau / Power BI

What Bloom Does:

- Ingests fragmented ESG data
- Normalizes and verifies it
- Allows **plug-and-play exports** to BI tools via built-in integrations

Think of it as:

"We handle the messy ESG data work — so you can focus on what you're trying to report."

Larger Enterprises or ESG-Mature Teams [🔗](#)

Use Case:

- Already have Watershed, Persefoni, or Workiva
- Still suffer from upstream data fragmentation
- Switching ESG vendors is hard and expensive

What Bloom Does:

- Becomes the **middleware layer**
- Standardizes and houses ESG data in one place
- **Enables optionality** — you can switch reporting platforms or feed them better data

"We sit beneath your ESG stack. You own your data, clean and portable, no matter what platform you use."

This is a **really sharp question**, and you're absolutely right to question it — because it hits at the **crucial strategic tension** in your business model:

Why would an enterprise pay for Bloom **on top of** Watershed or Workiva, when those platforms already include some kind of data ingestion/cleaning?

Here's the reality: **yes, time reduction can be a huge pain point**, but for larger enterprises, **that alone isn't enough** unless it translates to:

- **Reduced internal headcount/time costs**
- **Audit risk reduction**
- **Flexibility and leverage over locked-in vendors**
- **Accelerated reporting timelines under regulatory pressure (e.g., CSRD)**

Let's break it down.

Why Enterprises *Might* Pay for Both [🔗](#)

1. Their ESG Platforms Don't Solve the Fragmentation [🔗](#)

Watershed, Workiva, Persefoni — they do *some* integrations, but they:

- Require **manual CSV uploads** for many systems (even basic ones like Workday)
- Lack native integrations with legacy tools or custom enterprise systems
- Don't standardize field formats across systems
- Don't handle **internal verification, traceability, or data ownership logs**

So yes, they're paying for Workiva — but *they're still manually gathering and cleaning data for it*.

2. Internal Labor Cost and Redundancy [🔗](#)

At enterprise scale:

- **A single ESG analyst's time = \$\$\$**
- **30+ stakeholders feeding in data = coordination hell**
- **Audit readiness = legal exposure**

Bloom can:

- Eliminate internal back-and-forth across departments
- Provide **traceable, verifiable data with full lineage**
- Cut 3–4 weeks of labor from every quarterly reporting cycle

If you show that **your \$50K/year license saves \$150K+ in internal coordination**, it becomes a no-brainer.

3. Vendor Leverage + Interoperability [🔗](#)

Switching from Watershed to Persefoni? Migrating from Workiva to Microsoft Sustainability Cloud?

If all your ESG data is already clean and sitting in Bloom:

“We don't care what tool you use. You own your ESG data infrastructure. Export it wherever.”

That's **vendor leverage** — and large companies care deeply about that.

They don't want to be boxed in by proprietary formats or locked ecosystems.

Why Some Enterprises *Won't* Pay [↗](#)

You're absolutely right that **not all enterprises will double-pay**. Cases where Bloom won't be justified:

- Companies with deep custom integrations already built into Workiva, Watershed, etc.
- Those who have dedicated ESG engineering/data teams solving the pipeline in-house
- Or orgs who are reporting just once a year and don't care about efficiency or insights

That's fine — they're not your customer today.

The Key Strategic Insight [↗](#)

For enterprises, **Bloom isn't a "cost-reduction" tool — it's a "control and speed" tool.**

"We give you control of your ESG data and unlock interoperability, traceability, and faster reporting — regardless of what platform you're on."

If the customer:

- Is under **regulatory pressure**
- Has **multiple stakeholders**
- Has **volatile or growing ESG needs**
- Or plans to **switch tools in the next 12–24 months**

...Bloom gives them an **insurance policy and a head start.**

Problem We're Solving [↗](#)

Today, ESG practitioners are stuck:

- Manually wrangling data from 10+ systems (SAP, Workday, spreadsheets)
- With **no real-time visibility**
- With **no technical team to help**
- And under pressure to produce reports that are traceable, verifiable, and audit-ready

We solve this by offering:

- A **real-time ESG data layer**
- That works **without code**
- And turns fragmented data into **clean, explainable, insight-ready outputs**

1. No Engineering Resources → Push-Button Simplicity [↗](#)

How It Works [↗](#)

- When users sign up, they're guided through a **no-code onboarding wizard**.
- They connect their systems via:
 - **Native integrations** (e.g., Workday, SAP, QuickBooks)
 - **OAuth tokens** for common tools (Google Sheets, Excel, NetSuite)
 - **Drag-and-drop CSV importer** if integrations are unavailable

No Engineering Required [↗](#)

- No scripts.

- No API keys to copy/paste.
- No dev tickets.
- Just **click, map, and go**.

Example Interface [↗](#)

“Select data source → Map fields → Normalize → Done”

2. Add Insights, Flags, or Traceability for Audit-Readiness [↗](#)

Key Additions [↗](#)

- **Flag Incomplete/Missing Data**
 - “35% of Scope 3 travel emissions records missing distance field”
 - “No source attached to employee headcount field for Q1 2025”
- **Traceability Logs**
 - Every data point gets a changelog:
 - Who submitted it
 - When it was pulled/edited
 - Original system of record
 - Last verification date
- **Audit Readiness Score**
 - Custom scoring system (e.g., 84% ready for CSRD reporting)
 - Highlight risk areas (e.g., unsupported assumptions, missing metadata)
- **Insight Nudges**
 - “Data suggests Q1 2025 emissions are 12% above baseline — suggest flagging in board report”
 - “Estimated electricity usage from Cloud X spiked 18% — verify or annotate cause”

These **lightweight insights** add real value without competing head-on with Watershed or Workiva.

3. Implementation Ease: Zero-Code ETL, Drag-and-Drop Flows [↗](#)

User Flow [↗](#)

1. **Connect:** Use Zapier-style UX to plug into existing systems
2. **Map & Normalize:**
 - Drop in a CSV or connect to live data source
 - Use dropdowns to match fields (e.g., “Vendor Name” → “Supplier_Name”)
 - Click “Normalize”
3. **Validate:**
 - See preview table: all records in a common format
 - Flags highlight suspicious rows, mismatched formats
4. **Export or Sync:**
 - Sync to external reporting platform (Watershed, Persefoni, internal BI tool)
 - Or download as traceable report package (CSV, PDF, JSON)

Behind the Scenes [↗](#)

- You run automatic ETL pipelines under the hood using Python/Golang + Airbyte or dbt-style transformation logic.

- Data types are standardized using ESG-specific schemas.
- Every data point is **annotated with its source, version, and owner**.

Summary: Why This Works [🔗](#)

Challenge	Solution
No engineering team	100% no-code experience
Data scattered across systems	One unified, normalized view
Lack of auditability	Built-in traceability, changelogs, and verification tags
Unclear data value	Insights & scorecards that reduce ESG team workload
Reporting urgency	Plug-and-play outputs or sync to ESG platforms

6 Strategic Ways to Solve ESG Data Fragmentation [🔗](#)

1. Build a Centralized Integration Layer (Your Core Play) [🔗](#)

"One place where everything pipes into."

- Connect to SAP, Workday, spreadsheets, carbon accounting tools, etc.
- Use APIs, SFTP, and file uploads to extract and ingest ESG data.
- Clean, store, and structure the data in a central database or warehouse.

This is the wedge your MVP starts with — the single source of truth.

2. Standardize the Data Structure (Schema & Normalization) [🔗](#)

"Even if data is centralized, is it usable?"

- Normalize units, scopes, geographies, naming conventions.
- Auto-tag data to the correct ESG indicators (Scope 1, 2, 3; GHG Protocol, etc.).
- Resolve issues like duplicate records, misaligned timeframes, and inconsistent formats.

This layer makes your data trustworthy, auditable, and comparable.

3. Enable No-Code/Low-Code Data Pipelines [🔗](#)

"What if users could plug in their own systems easily?"

- Let sustainability teams connect sources via drag-and-drop or templates.
- Support scheduled data pulls (e.g., utility bills monthly, HR data quarterly).
- Build pre-configured connectors for common platforms (NetSuite, Oracle, etc.).

Reduces engineering burden for your customers. Big retention play.

4. Embed Smart Automation & Workflows

“Make fragmentation invisible to the user.”

- Automatically notify teams when data is missing, stale, or invalid.
- Trigger actions: “Upload latest Scope 2 data,” “Verify emissions factor.”
- Automate document generation for compliance (CDP, SEC, CSRD).

Turns static data into dynamic workflows, reducing human effort.

5. Offer Real-Time Dashboards & Reporting

“Seeing is believing.”

- Provide user-friendly dashboards to visualize emissions, trends, gaps.
- Allow export into frameworks like GRI, TCFD, SEC 10-K inserts.
- Use alerts to flag anomalies (e.g., spikes in energy use).

This makes your platform indispensable during reporting season.

6. Create a Developer-Friendly ESG API

“Let others build on your data layer.”

- Offer secure APIs for teams who want to use your cleaned ESG data in other tools.
- Potential long-term moat (like Plaid or Stripe for ESG data).
- Makes you a backend infrastructure play, not just a dashboard tool.

This is optional now, but could evolve into a powerful platform strategy.

Big Picture Strategy

You’re not just centralizing ESG data. You’re solving fragmentation at every level:

Fragmentation Type	Solution Layer
Source/system	Integration layer
Format/structure	Normalization
Workflow/process	Automation
Visualization/use	Dashboards
Interoperability	API access

TL;DR:

Your core idea — **integrated ESG data infrastructure** — is 100% the right starting point. But the most powerful solutions **don’t stop at integration** — they solve fragmentation **across structure, workflow, and access**. If you do that, you won’t just be "a tool" — you’ll become **the ESG operating system** companies run on.

Think of It Like Building a Stack [🔗](#)

Imagine your product like a **layered infrastructure system** — each layer solves a different part of the data fragmentation problem, but together they form one cohesive platform:

1. Integration Layer [🔗](#)

"Connect everything."

Ingest data from SAP, spreadsheets, utility APIs, HR tools, etc.

MVP: Prebuilt connectors + manual CSV upload

2. Normalization Layer [🔗](#)

"Clean and standardize it."

Map units, timeframes, naming, and scopes across sources.

Phase 2: Auto-tag Scope 1/2/3, unit conversions, data deduplication

3. Automation & Workflow Layer [🔗](#)

"Make it run on its own."

Scheduled pulls, email reminders, validations, approvals.

Phase 3: Set up Slack/email nudges, validation logic, submission flows

4. Analytics & Reporting Layer [🔗](#)

"Make it usable."

Live dashboards, KPIs, export-ready reports for CSRD, SEC, etc.

Phase 4: Prebuilt templates + custom dashboards

5. API/Platform Layer [🔗](#)

"Make it extendable."

Let other tools (like Workiva or Watershed) pull clean data from your system.

Long-term: Secure API with granular access controls

So Yes — One Platform Can Do It All [🔗](#)

You're not building **5 different products** — you're building **one extensible system** that solves one massive pain point in multiple ways.

Think:

- **Plaid** unified bank data → added identity, analytics, and integrations
- **Rippling** unified HR data → added IT, finance, compliance
- **Snowflake** unified data warehouse → added apps, governance, AI

What Makes This Work [🔗](#)

- Start small (e.g. **real-time GHG data from SAP + spreadsheets**)
- Expand by adding **layers** — not pivoting, just deepening

- Build for **ESG leads** who crave less chaos and more clarity

TL;DR: [🔗](#)

Yes — you’re building a **full-stack ESG data infrastructure platform**.
Start with **integration**, then layer on **cleaning, automation, reporting, and extensibility**.
One platform. One login. Zero fragmentation.
That’s your edge.

Let’s draw the line between **smart layering** and **scope creep**:

What *Not* To Do (Scope Creep) [🔗](#)

- Building dashboards, API layers, and automation *all at once*
- Trying to replace Workiva, Persefoni, AND Watershed from Day 1
- Targeting every ESG persona (analyst, CFO, IT, procurement, etc.)
- Saying "yes" to every enterprise feature request just to please people

This is how good ideas die.

What *To* Do Instead (Focused Platform Thinking) [🔗](#)

You can still build a **multi-layer platform** — but you do it **one sharp wedge at a time**:

Phase 1: Nail the Wedge [🔗](#)

- ☒ Pain Point: Fragmented ESG data across systems
- ☒ Persona: ESG reporting lead
- ☒ Use Case: Automate data pulls from SAP + spreadsheets → normalize → store
- ☒ Outcome: Real-time, auditable, unified ESG dataset ready for reporting

Build just *this* — and make it frictionless, fast, and reliable.

Phase 2+: Layer on Growth, *Only If It Reinforces the Wedge* [🔗](#)

Once you’ve validated the wedge with early adopters, you can say:

- “Our users are already pulling data into our system — let’s add normalization so it’s usable.”
- “They keep asking for the same report — let’s templatize that output.”
- “They’re copying/pasting into Workiva — what if we offered a clean export or API?”

Each new feature is **customer-driven**, and built **on top of** the same data foundation — not a whole new product line.

Framework: Focused Platform ≠ One-Stop Shop [🔗](#)

Trap	Smart Move
Build everything upfront	Build wedge first, expand layer by layer
Be everything to everyone	Be indispensable to one persona
Add features to look “platform-y”	Add features only when the wedge is solid

Try to replace Workiva/Watershed	Become the source of truth they plug into
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TL;DR: [🔗](#)

You're not wrong — trying to be a one-stop shop too early **will kill you**.

But you can still build a powerful platform **by starting with one wedge**, validating it, and only layering on what's essential to make that wedge *more valuable*.

Solve one problem insanely well. Then earn the right to solve the next.

That's not scope creep — that's scope *discipline*.