How to Use the ESG Readiness Checklist

Purpose of This Guide

This guide explains how to use the ESG Readiness Checklist as part of your service delivery. It is designed for internal use to ensure a consistent, professional setup process with every client.

When to Send the Checklist

Once a client agrees to work with you, send the ESG Readiness Checklist immediately alongside your initial data request. This sets expectations and frames the engagement as structured and efficient.

How the Client Should Use It

Ask the client to review the checklist and tick items they already have available. They should gather existing documents and data where possible, without creating anything new at this stage.

How You Use the Checklist

Use the completed checklist to establish a clear baseline. It allows you to identify which ESG areas are already covered and where light-touch setup or templates are required. This directly informs the structure of the KPI tracker and the evidence pack.

Why This Speeds Up Delivery

Because the client understands upfront what information is needed, the first 1–2 days of the 7-day setup focus on organisation rather than clarification. This reduces back-and-forth, keeps the engagement professional, and helps you deliver on time without pressure.

Best Practice Notes

• Do not ask clients to create new data at this stage.
• Emphasise that estimates and partial information are acceptable.
• Use the checklist as a working document, not a compliance test.
• Refer back to it during the handover call to reinforce value.