

Case Study: Business and Technology

Introduction of the Team and Key Needs

The following NotedSource client represents a global business and technology consulting firm. Within this consulting firm, the environmental, social, and governance team sought to drive insights and climate action for financed emissions. Their goal was to learn more about the types of analysis needed to develop an investment strategy for stronger returns, lower risk, and climate consciousness.

The Challenge

The corporation's environmental, social, and governance (ESG) team wanted to develop a go-to-market approach for financed emissions and needed tailored expertise on the types of analysis that should be performed in order to evolve their strategy. However, the time dedicated to identifying the correct sustainability researchers and onboarding them was draining and outside the scope of anyone's day to day responsibilities.

The Solution

To overcome this challenge, the ESG team partnered with NotedSource to identify and onboard industry professionals, ESG consultants, and sustainability researchers at leading universities. NotedSource's platform also assisted with communication between the client and researchers, scheduling, payments, and research output.

The Process

The ESG team began by identifying the key topics of research, including **ESG reporting standards, investment strategies, and protocols for financed emissions**. Using AI technology, NotedSource's Research team assessed thousands of candidates within NotedSource's platform in addition to evaluating what kind of external perspectives could be useful for the study.

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The Process

From there, NotedSource's research team matched the ESG request with dozens of vetted, ranked research profiles. Within the platform, clients were able to view each researcher and industry consultant's CVs, areas of expertise, publication links, and career highlights. **The ESG team reviewed the top recommendations and then selected their preferred researcher for each project.** The team also used the platform tools to organize all of the information for each project and collaborate with the researchers using the platform's communication tools, making it easy to exchange ideas, documents, and provide feedback.

Outcome and Summary

This ESG team's use of NotedSource for collaboration with researchers resulted in the a roundtable discussion and the formulation of new strategy for the consulting firm's financial sector clients. Within this roundtable, the consulting firm was able to share insights and gather feedback on how their target audience resonated with their updated approach. **This resulted in improved data visualizations and deliverables with a decreased time to source, onboard, and collaborate with any researcher.**

The NotedSource platform served as a central hub for project data, communication, and management tools, which accelerated the client's ability to innovate their financed emission advisory approach. This partnership **aligns with the organization's mission to provide cutting edge advisory services that will allow corporations to unlock innovation and build for the future.**