

ESGLEAD

LEARN **E**VALUATE **A**DVANCE **D**ISCLOSE

Powered by:



ESG LEAD User Guide

January 2022

Version 1.1

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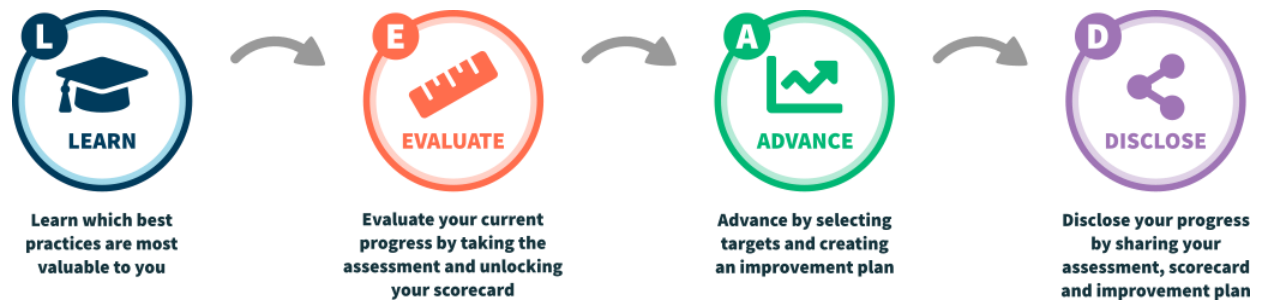
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Quick start guide



Sign up

Sign up is simple: go to <https://esglead.lgcassure.com/register/welcome> and enter the email address you use for the organisation you wish to register an account for; complete registration by entering your organisation's name, your name, a password, and agree to the terms and conditions.

NB: If you have received an email invitation from a brand, please follow the link in the email to sign up. You must use this email address so that you can share your information with the brand.

Once you have completed the sign-up form you will receive an email to verify your email address and activate your account. Follow the link in this email and continue to sign in.

Sign in

Go to <https://esglead.lgcassure.com/login> and enter your email address and password to sign in.

Set up your organisation

If you are the first person in your organisation to create an account, you will become the Organisation Owner and will be asked to set up your organisation.

The L.E.A.D process works at the site level. Each of your organisation's sites can follow the four steps: **Learn**, **Evaluate**, **Advance** and **Disclose**.

You will need to create at least one site, but we recommend creating one site per postal address in your organisation.

Let's set up your organisation

?

- You need to create at least one site.
- You can create as many sites as you need.
- You can invite people to become members of a site.
- You can create and edit sites at any time by selecting then "Manage your organisation".

Hide ^

[+ Create new site](#)

Type	Name	ID or reference	Address	Country	Site Owner	Actions

Items per page: 10 0 of 0 < >

[Continue](#)

Select “Create a new site” and enter all the required details, hit save and you will see your new site in the table.

NB: Make sure to select all product categories that are relevant to the site.

You can continue to create sites and invite your colleagues as members of those sites, see “Manage your sites” section in this guide for more information. When ready, select “Continue” to proceed to your home page.

Home

This is your home page.

Home
Hide ^

?

How it works

Site activity

No recent activity

- Spread best practices throughout your supply networks
- Gain insight into your supplier ESG strengths and weaknesses

[Invite your suppliers now](#)

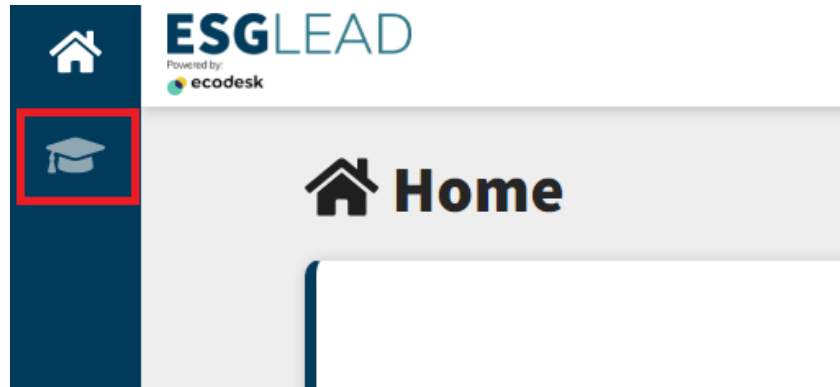
Your sites

[Manage your sites](#)

From here you can track the progress of all your sites and see any recent activity.

Learn

The first place to head to is **Learn**. You can access the **Learn** section anytime by clicking the graduation cap icon in the menu.





Best practices are broken down into three subjects: Environment, Social and Governance, and then into further categories e.g.: Water, Waste, Human Rights. Take your time navigating categories and reading best practices, but don't feel you have to read through everything! There's a lot here and new best practices will be continually added. It's a good idea to come back from time to time.

When you are happy with your understanding of the best practices it's time to start the **Evaluate** assessment.

Evaluate

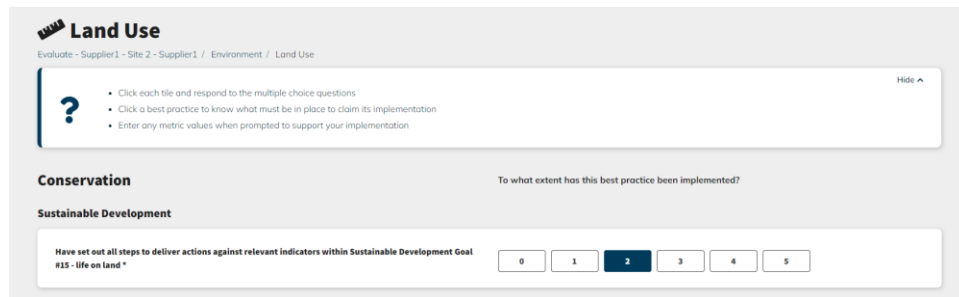
Head to your home page and scroll down to “Your sites” table. You should see a list of sites you created earlier. For each site you will need to complete an **Evaluate** assessment.

Type	Site name	Status	Maturity & Score	Actions
	Bristol Office	Not started	-	Start 

Items per page: 10 1 - 1 of 1 < >

Select “Start” to begin your assessment for that site.

You will see the same subjects as in the learn section. Navigate through to a category to see the best practices.



For each best practice you will need to select the most appropriate answer to the question: **To what extent has this best practice been implemented?** You have the options of 0 through to 5 to respond. See “Evaluate” section in this guide for more information.

NB: You can select the best practice title to see detailed information. This will open a new tab in your browser, so you won’t lose any progress in your assessment.

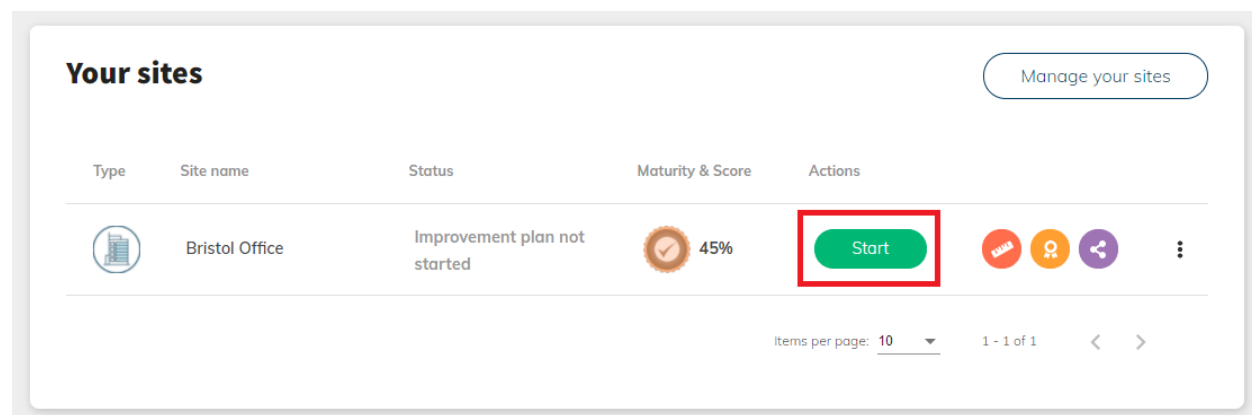
You can save and return at any time, select the “Save” button to save your progress.

Once you have answered all questions in all categories you can complete the assessment. Select the “Complete” button and confirm you want to complete your assessment.

Congratulations! You have unlocked your scorecard and can access the **Advance** section for this site.

Advance

If you head back to the home page you will see that you can start the **Advance** section for your site. The **Advance** section will help you build an improvement plan.



For each best practice you can select an improvement target and add the actions you plan to take to achieve the target. See “Advance” section in this guide for more information.

NB: You do not need to set a target for all best practices.

The screenshot shows the 'Efficiency' section under the 'HVAC' category. The main heading is 'Efficiency' with a sub-header 'Select best practices you plan to improve on by selecting an improvement target'. Below this, the category 'HVAC' is listed. The primary objective is 'Reduce the need for/use of HVAC systems'. A target selection interface is displayed with a scale from 0 to 5. The current target is set to 3, indicated by a green box and a star. A green line shows the 'You & peer average' at approximately 1.5. A 'Target' label is positioned above the star. To the right, a 'LOW OPPORTUNITY VALUE' label is visible. Below the target scale is a rich text editor with a toolbar containing options for Paragraph, Bold, Italic, Underline, Text Color, Strikethrough, Superscript, Subscript, Link, Unlink, Bulleted List, Numbered List, and Indent. The text area contains the prompt: 'Please specify the actions and/or steps you plan to take to achieve the improvement target *'.

You can save and return at any time, select the “Save” button to save your progress.

Once you are happy with the targets set, hit “Complete” and confirm you want to complete the **Advance** section.

Awesome! You now have improvement targets to aim for. Let’s **Disclose** your improvements with any requesting brands.

Disclose

Jump back to your home page and select the purple **Disclose** icon for your site.

The screenshot shows the 'Your sites' table. The table has columns for Type, Site name, Status, Maturity & Score, and Actions. The first row shows a site named 'Bristol Office' with a status of 'Improvement plan complete' and a maturity score of 80%. The Actions column contains several icons: a checkmark, a person, a document, and a purple icon with a white arrow pointing outwards, which is highlighted by a red box. A 'Manage your sites' button is located in the top right corner. At the bottom, there is a pagination bar showing 'Items per page: 10' and '1 - 3 of 3'.

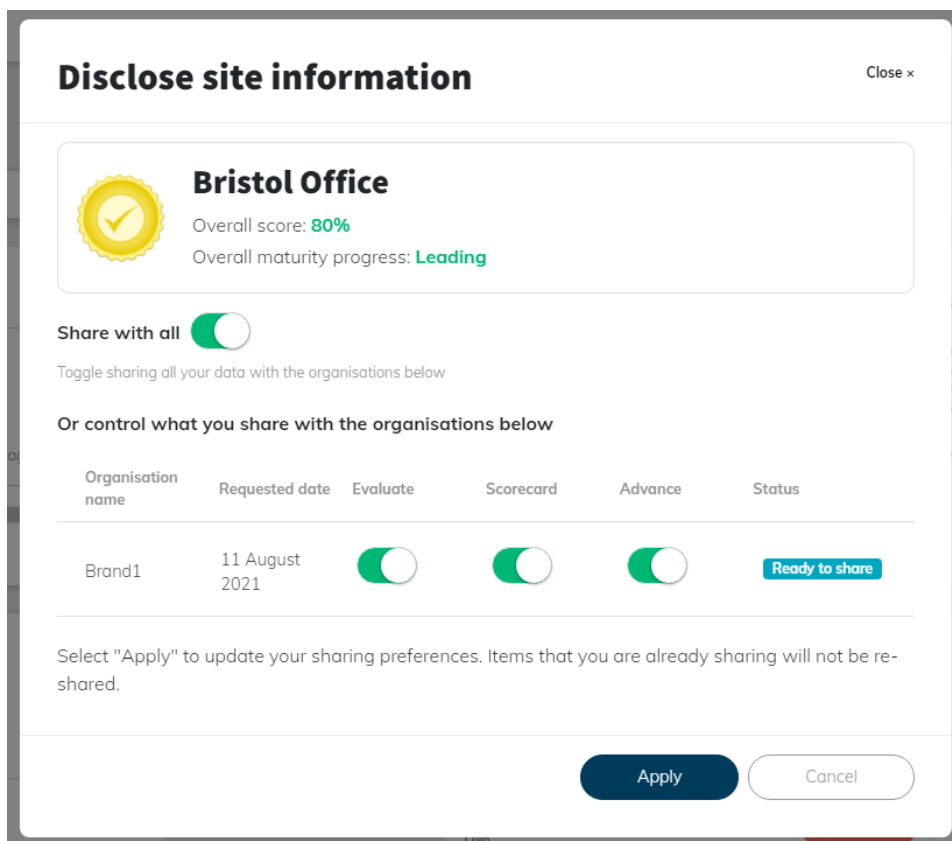
Type	Site name	Status	Maturity & Score	Actions
	Bristol Office	Improvement plan complete	80%	

You can select to share your **Evaluate** assessment, Scorecard and **Advance** improvement plan with any brands that sent you an invite.

NB: You will need to subscribe to a site license plan and activate a site license to enable you to share your data. See “How to license a site” in this guide for more information.

You can update your sharing preferences at any time by using the toggle switch and applying.

NB: If the status says “Ready to share” you need to select apply to share your information.



The screenshot shows a modal titled "Disclose site information" with a "Close x" button in the top right. The main content area for "Bristol Office" displays a gold medal icon, an "Overall score: 80%", and "Overall maturity progress: Leading". Below this is a "Share with all" toggle switch, which is currently turned on. A note states: "Toggle sharing all your data with the organisations below". Underneath, a heading reads "Or control what you share with the organisations below". A table follows with columns: "Organisation name", "Requested date", "Evaluate", "Scorecard", "Advance", and "Status". The table contains one row for "Brand1" with a requested date of "11 August 2021". The "Evaluate", "Scorecard", and "Advance" columns each have a toggle switch, all of which are turned on. The "Status" column shows a blue button labeled "Ready to share". At the bottom of the modal, a note says: "Select 'Apply' to update your sharing preferences. Items that you are already sharing will not be re-shared." There are two buttons at the bottom right: a dark blue "Apply" button and a light gray "Cancel" button.

Organisation name	Requested date	Evaluate	Scorecard	Advance	Status
Brand1	11 August 2021	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Ready to share

If you have more sites, you will need to complete the **Evaluate**, **Advance** and **Disclose** steps for all of them.

NB: You can invite your colleagues and assign them to specific sites so that they can help with completing the assessment and setting improvement targets. See “How to manage site members” and “How to invite a user to join your organisation” below.

Congratulations you have finished the Quick start guide! The following sections of this user guide go into more detail should you need it.



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Sign up

I have been invited by a brand to sign up

- If a brand has invited you to sign up you will receive the following email:

ESG LEAD: Invitation

Dear

You are receiving this message as is inviting you to register and use the ESG Lead platform.

The ESG Lead platform has been developed by BRCGS and Ecodesk in collaboration with leading brands and retailers committed to ensuring the highest level of care is taken to minimize the impact of the value chain on the people that manufacture and consume their products; the environment in which those products are produced and the manner in which they are consumed.

As a supplier to you will be able to access the ESG Lead platform and work your way through the 4 steps:

- **Learn** – inform yourself and your team about what good looks like and what is expected in the context of ESG global best practice.
- **Evaluate** – measure your performance.
- **Advance** – plot your own path to improvement at your own pace.
- **Disclose** – when you're ready, share your achievements with your key stakeholders.

To access the platform for the first time, click on the link below where you will be guided through the registration and set-up process.

[Register Now](#)

Alternatively, if you have already registered on the system we would love for you to share your information with us.

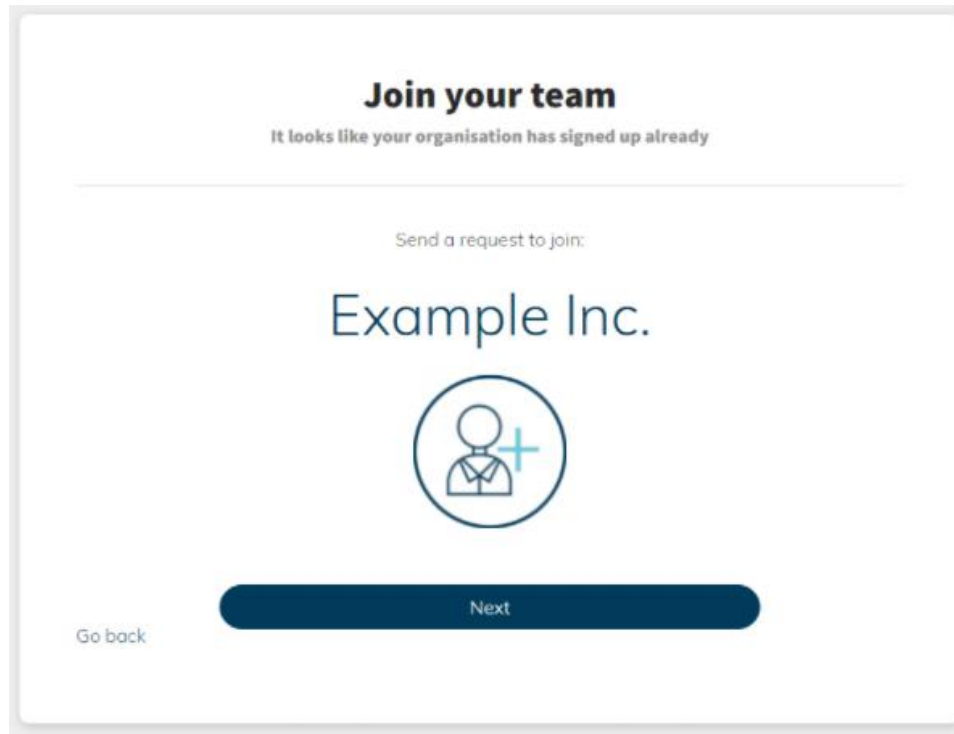
[Login](#)

Kind regards,

- If this is the first time you have received this email, please select “Register now” and complete the registration form.
- If you already have an account, select “Login” and you can share your information with the brand.

My organisation already exists

- If someone in your organisation has already registered, you may be asked to join your team. You will see the screen below after entering your email address or if you enter an organisation name that has already registered.



- Select “Next” to send a request to join your organisation. Your request will need to be approved by the Organisation Owner before you can sign in.

I have been invited to join my organisation

- If someone from within your organisation has invited you to join, you will receive the following email:

Dear Sir / Madam,

You have been invited to register on ESG LEAD by Owner Brand1 at Brand1.

Once registered you have been granted access to the following sites: Site 1

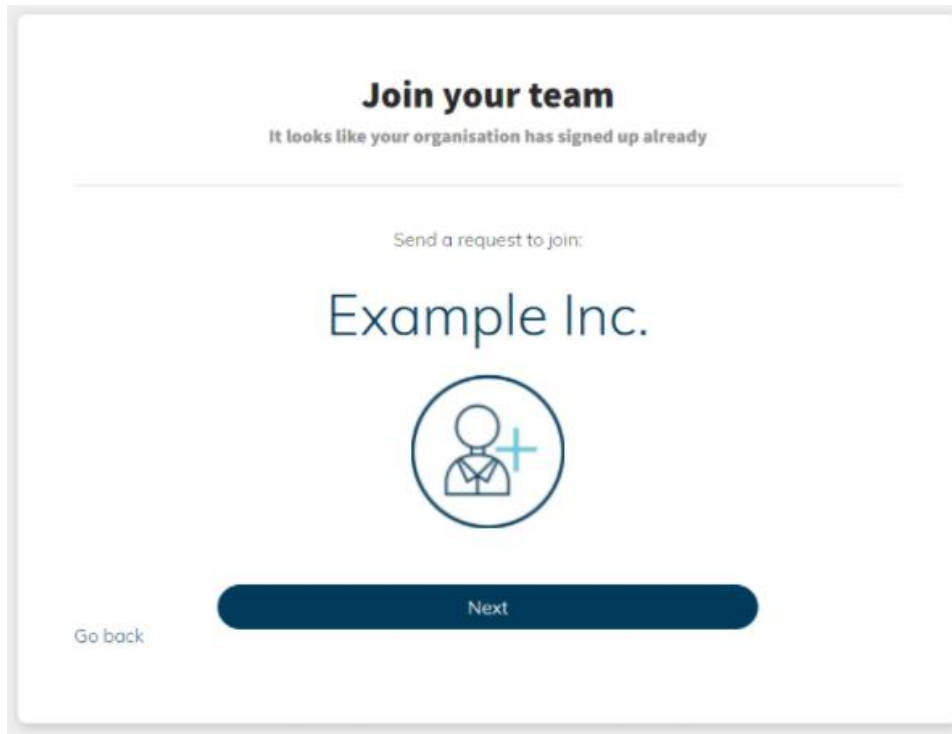
Click on the link below to sign up for free.

Sign Up

Thanks,

ESG Lead team

- Select “Sign Up” to register with your organisation email address.
- Enter your email address and select “Next” and you should see a request to join your organisation:



- Once you have registered and verified your email address you will be able to sign in.
- You will only have access to the sites that your organisation owner has given you permission to view.
- If you need to access to another site, please contact your organisation owner.

My email address is already in use

- If you enter an email address that is already in use you will see the following message:

Sign up to ESG LEAD

Improve your ESG credentials with the ESG LEAD tool

Just enter your email to begin.

We can connect you with your organisation or set you up with a new account.

Email address *

The email address you entered is currently in use, please go back and try another.

Next

- If this is the correct email address, select [Already have an ESG LEAD account? Sign in](#) and continue to sign in.

Password policy

- Your password must adhere to the following:
 - Be at least 8 characters long
 - Have a number
 - Have a lowercase letter
 - Have an uppercase letter
 - Have one of the following characters: ! @ # \$ % ^ & *
 - No more than 68 characters

Verify your email address

- Once you have completed the sign-up form you will receive an email to verify your email address and activate your account.

Dear

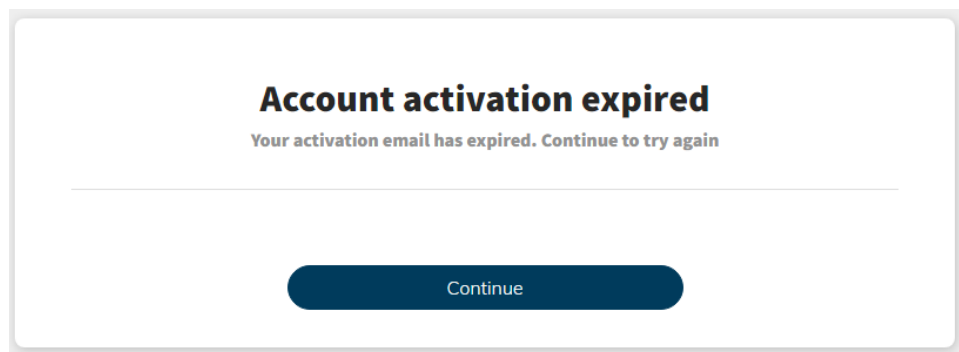
Thank you for registering on ESG Lead.

Before we log you in, please click on the link below to verify your email address.

[Confirmation link.](#)

ESG Lead team

- Select “Confirmation link” to verify your email address. This will open your internet browser. Wait for the page to load and select “Continue” to sign in.
- If the activation link has expired, you will see the following message:




- Select “Continue” and enter your email address to send another activation email.

Sign in



I have entered my password incorrectly

- If you enter your password incorrectly you will see the following message:

Email address

 user@example.com

Password

Please check your credentials and try again. Attempts remaining 4/5.

[Forgot your password?](#)

Sign in

- You will have 4 more attempts to enter your password correctly before your account is locked.
- You can select “Forgot your password?” if you would like to reset it.

How to reset your password

- Go to <https://esglead.lgcassure.com/login>
- Select “Forgot your password?”

Email address

Password

[Forgot your password?](#)

Sign in

- On the next screen enter the email address of the account you wish to change the password for.
- You will receive the following email with a link to reset your password:

Dear

You requested to reset your password for ESG LEAD.

Click on the Password reset link below

Password reset link

Thanks

ESG Lead team

- The link will open your internet browser and you will need to enter a new password and select [Reset Password](#)
- You will now be able to sign in using your new password.

How to unlock your account

- For security reasons if you enter your password incorrectly 5 times your account will be locked, and you will no longer be able to sign in even if you use your correct password.

Email address

Password

Unfortunately your account has been locked. An email has been sent with a link to unlock your account. Please click [here](#) to resend the email.

[Forgot your password?](#)

[Sign in](#)

- You will receive the following email with a link to reset your password or unlock your account.

Dear

Unfortunately your account has been disabled due to too many login attempts with an incorrect password.

If this was you and you have forgotten your password please reset it by visiting the link below

Password reset link

Otherwise please unlock your account with the link below

<https://esglead.lgcassure.com/account-unlock/xxxxxx-xxxx-xxxx-xxxxxxxxxxxx>

Thanks

ESG Lead team

- If you have forgotten your password, please select “Password reset link” to reset your password.
- You also have the choice to unlock your account by selecting the link below, this will keep your current password in use.

I have forgotten the email address used for my account

- If you forgotten the email address used for your account, you will see the following message:

Email address

Password

Please check your credentials and try again.

[Forgot your password?](#)

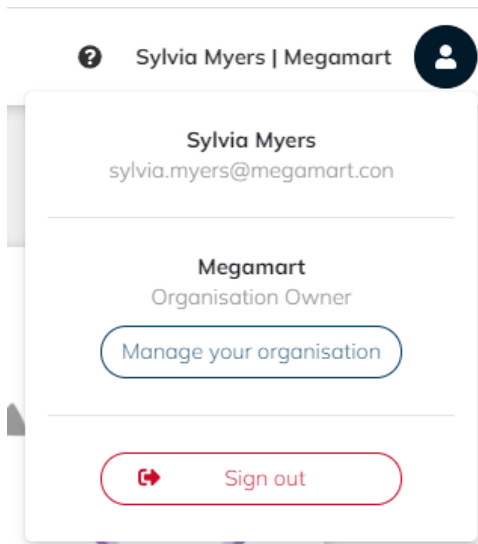
Sign in

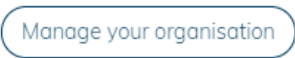

- Please check you have entered your email address correctly.
- If you still cannot access your account, please contact our support team to help recover your account: <https://form.jotform.com/SamCrome/esg-lead-support>

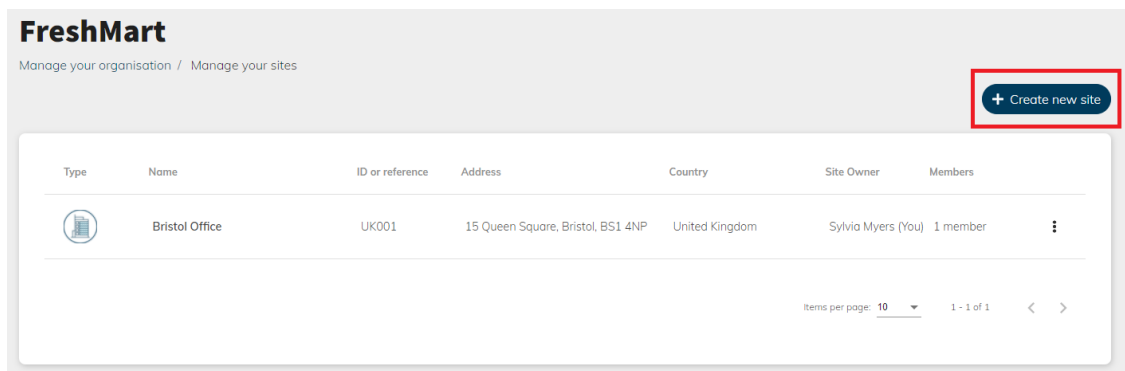
Manage your sites

How to create a new site


- Sign in and select the user icon  in the top-right corner. This will display a dropdown menu with further actions.




- From the dropdown, select 
- On the "Manage your organisation" page select the "Manage your sites" tile.
- To create a new site click on the  button

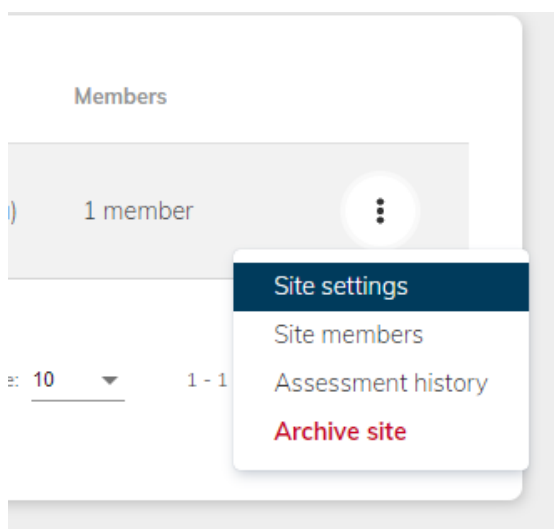


- In the modal, complete the following information for the site:
 - Site name (required)
 - ID or reference
 - Type
 - Industry segment (required)

- Product category (required)
 - Address (required)
 - Country
- Required free text fields will need to have a least 1 character and no more than 150 characters in length.
- Once you have completed the required fields, click on the  button to create the site.
- **Important!** Once you have created the site you will not be able to change the product category or industry segment as these are used to tailor the best practices to your site.


How to edit a site

- To edit a site's information, click on the vertical ellipsis  icon for the site and select "Site settings" from the dropdown menu to open the "Edit site" modal.





- After making the desired changes, click on  button to save them.

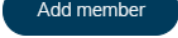
How to archive a site

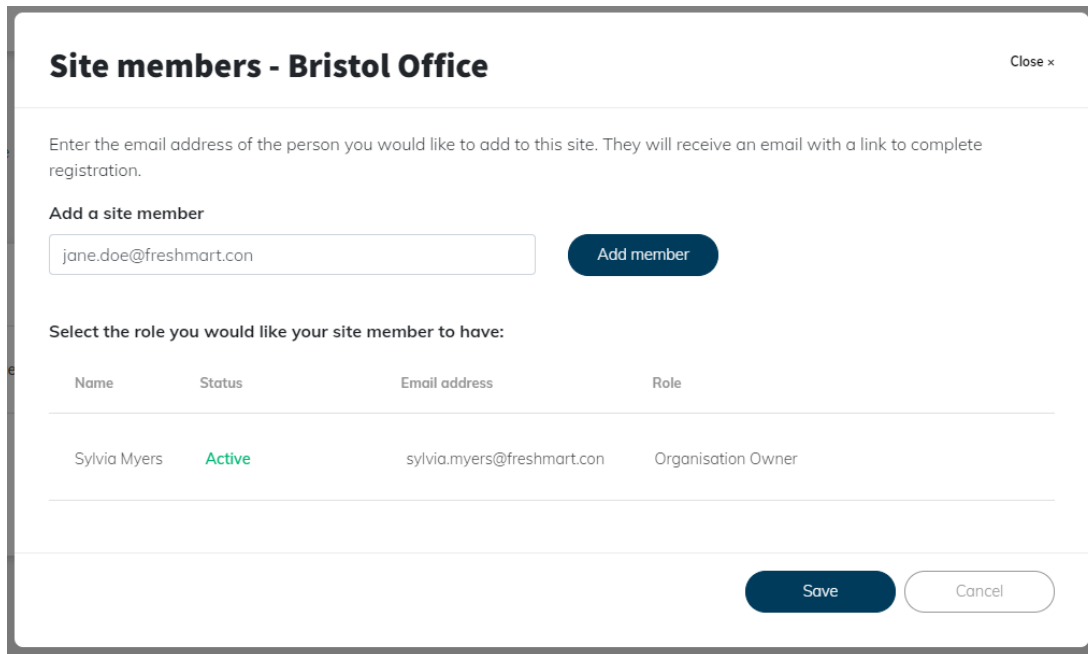
- To archive a site, click on the vertical ellipsis  icon for the site and select "Archive site" from the dropdown menu.
- You will then be prompted to confirm that you wish to proceed to archive the site. Please note that currently you will be unable to be unarchive/restore a site which has been archived.
- When you archive a site the license will be removed and you can use it to activate another site.

How to manage site members

- To manage site members, click on the vertical ellipsis  icon for the site and select "Site members" from the dropdown menu which will open a modal.
- You are able to add site members, assign/update site member roles and remove site members.
- Once you have finished managing site members, select  to apply your changes.

Add a site member

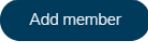
- To add a site member, enter their email address and click .
- The table will be updated with a new row, displaying the entered email address and the option to assign a role.
- This process may be repeated to add multiple site members.
- You cannot add a member who has been deactivated.



Site members - Bristol Office Close x


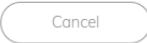
Enter the email address of the person you would like to add to this site. They will receive an email with a link to complete registration.

Add a site member



Select the role you would like your site member to have:

Name	Status	Email address	Role
Sylvia Myers	Active	sylvia.myers@freshmart.com	Organisation Owner

Assign/update site member roles

- There are 3 roles which a site member can be assigned: Site owner, contributor or viewer. See "User roles" in this guide for further information on user roles and permissions.
- Please note the Site owner role can only be assigned to user's who have completed the registration process. Until the user has registered, you will only be able assign them the "Contributor" or "Viewer" role.

Site members - Bristol Office

Close x

Enter the email address of the person you would like to add to this site. They will receive an email with a link to complete registration.

Add a site member

Add member

Select the role you would like your site member to have:

Name	Status	Email address	Role
Sylvia Myers	Active	sylvia.myers@freshmart.con	Organisation Owner
-	-	jane.doe@freshmart.con	<div>Site OwnerContributorViewer</div> x

Save

Cancel

Remove a site member

- To remove a site member, click on the ✕ icon.
- The removed member will have no access to the assessment, improvement plan and scorecard for the site they have been removed from.

Site members - Bristol Office

Close x

Enter the email address of the person you would like to add to this site. They will receive an email with a link to complete registration.

Add a site member

Add member

Select the role you would like your site member to have:

Name	Status	Email address	Role
Sylvia Myers	Active	sylvia.myers@freshmart.con	Organisation Owner
Jane Doe	Active	jane.doe@freshmart.con	<div><div>Site Owner</div><div>Contributor</div><div>Viewer</div><div>x</div></div>

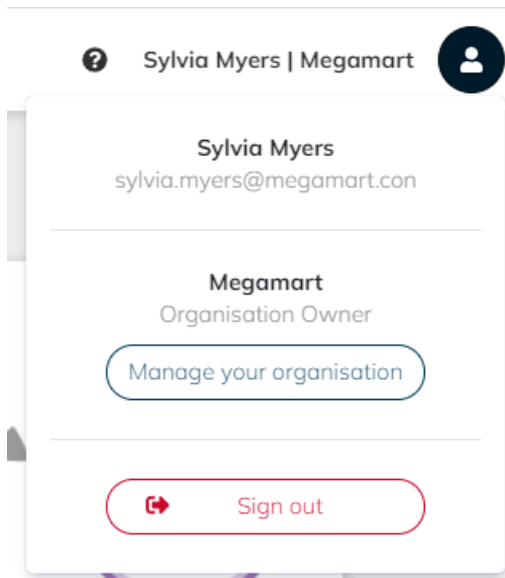
Save

Cancel

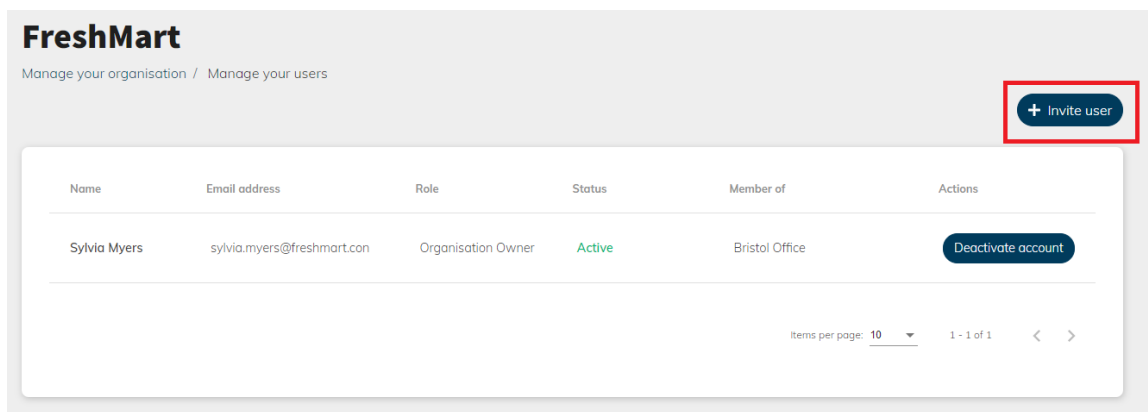
Manage your users

How to invite a user to join your organisation

- Sign in and select the user icon  in the top-right corner. This will display a dropdown menu with further actions.



- From the dropdown, select [Manage your organisation](#)
- On the "Manage your organisation" page select the "Manage your users" tile.
- A table will be displayed showing the organisation's users.
- You are able to invite a user to join your organisation by clicking [+ Invite user](#)




- In the modal, you will need to enter the email address of the user to invite and can optionally assign them a role for each site. See “User roles” in this guide for further information on user roles and permissions.

Invite user Close x

Enter the email address of the person you would like to join your organisation. They will receive an email with a link to complete registration.

Email address *



Select the roles you would like this person to have for each site: + Create new site

You can grant site owner access once the user has registered on the system

Site Name	Site Owner	Role
Bristol Office	Sylvia Myers	Site Owner Contributor Viewer
London Office	Sylvia Myers	Site Owner Contributor Viewer

Items per page: 10 1 - 2 of 2 < >

Send Cancel

- Click Send to invite the user. They will receive the following email with a link to complete the registration process:

Dear Sir / Madam,

You have been invited to register on ESG LEAD by Sylvia Myers at Supplier Inc.

Once registered you have been granted access to the following sites:
Bristol Office, London Office

Click on the link below to sign up for free.

Sign Up

Thanks,

ESG Lead team

User statuses

- A user will have one of the following statuses:

Status	Meaning
Active	User has an active account
Invite sent	User has been invited but not registered
Pending activation	User has registered but not yet activated their account
Locked	User has registered and account is locked (e.g. too many incorrect password attempts)

- You can view the status of a user in the “Manage your users” table.

User roles

- There are 3 roles which can be assigned to a user for a site. Each role will provide the user with different levels of access and permissions:

Action	Site Owner	Contributor	Viewer
Can add member to site	✓		

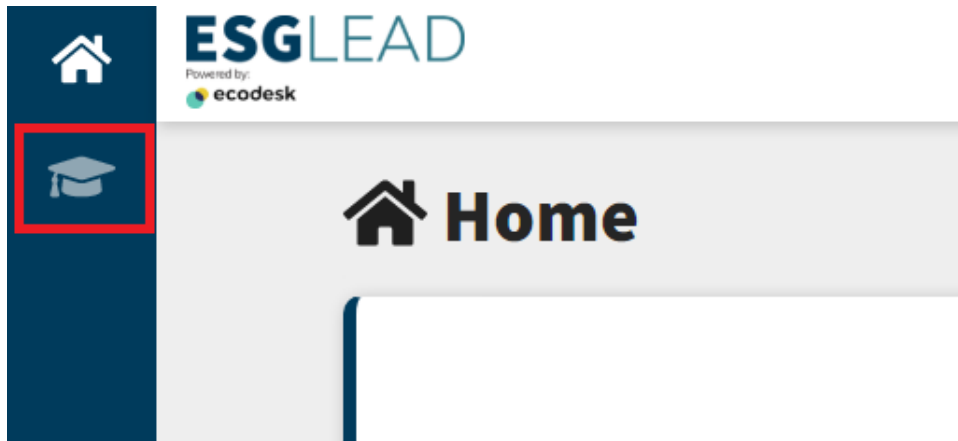
Can remove member from site	✓		
Can edit site details	✓		
Can start, edit, complete assessment	✓	✓	
Can start, edit, complete improvement plan	✓	✓	
Can view assessment	✓	✓	✓
Can view improvement plan	✓	✓	✓
Can view scorecard	✓	✓	✓

- Please note that the “Site owner” role can only be assigned to registered users. Once an invited user has completed the registration process, this role will be available for you to assign to the user.

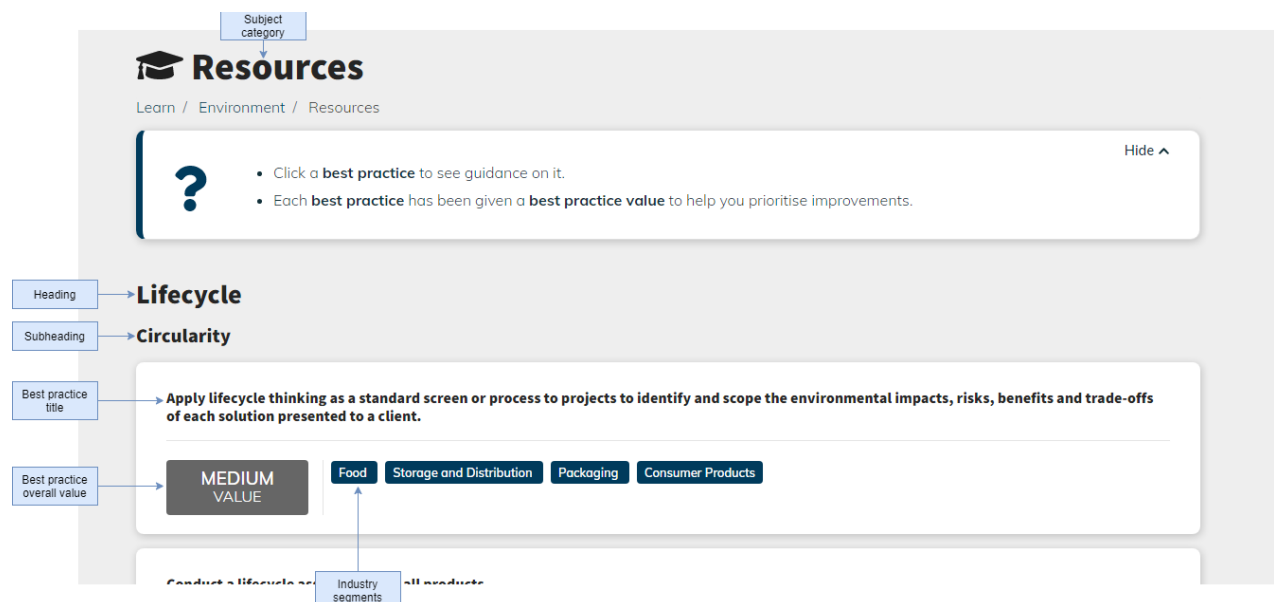
Learn

How to view a best practice

- Sign in and select the graduation cap icon in the left side navigation menu to access the Learn section:



- Best practices are broken down into three subjects: **Environment**, **Social** and **Governance**.
- Select a subject tile to see the subject categories and select a category tile to see all the best practices for that subject category.
- Best practices can be further categorized into headings and subheadings.
- To view detailed information select the best practice title.



What is the best practice value?


- Each best practice has been given a best practice value to help you prioritise improvements.
- The overall value of a best practice can be Low, Medium, or High.

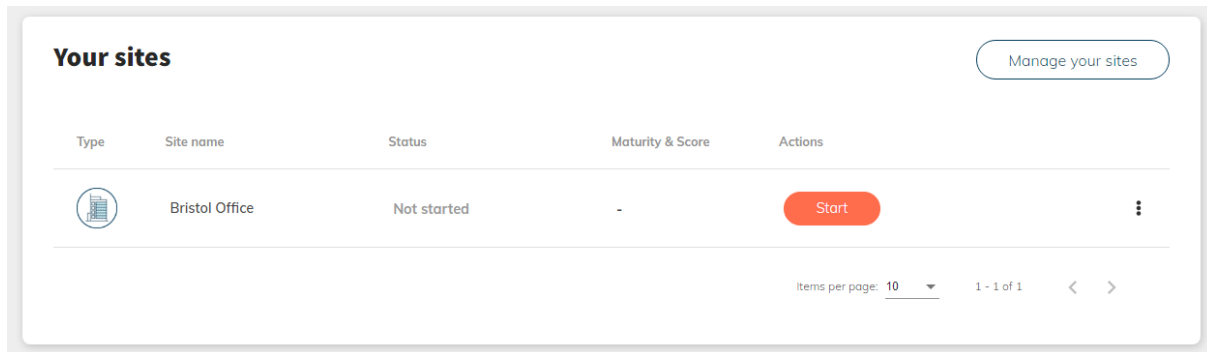
Industry segments

- The industry segments for which the best practice is applicable to are highlighted underneath the best practice title.
- The Learn section shows all best practices across all industry segments.

Evaluate

How to start an assessment

- You will need to have created a site before you can start an assessment, see “How to create a new site” in this guide.
- On the home “Your sites” table, select the  button in the site’s actions.



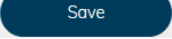
How to answer questions in an assessment

- For each best practice you will need to select the most appropriate answer to the question: **To what extent has this best practice been implemented?**
- There are 5 response options to choose from:

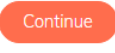
Response option	Meaning
0	Not started
1	Researching options
2	Planning and implementation has started
3	Work in progress and/or implemented across partial applicable scope
4	Established practice and/or implemented across most applicable scope
5	Mature practice and/or implemented across applicable scope

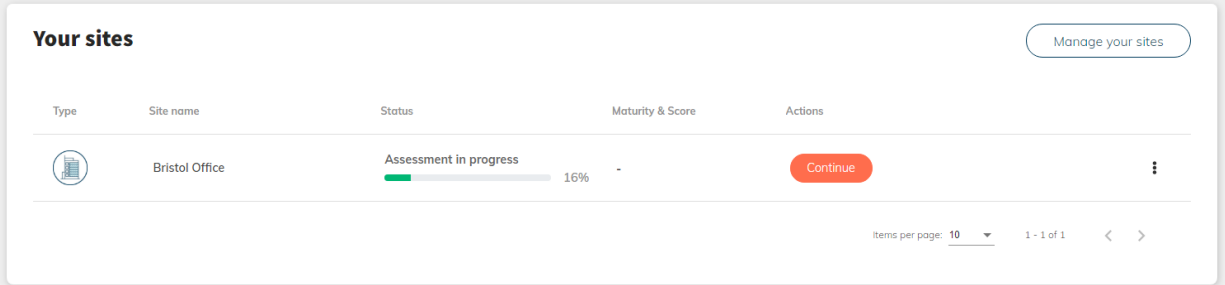
- On the selection of a response option of 3, 4 or 5 you may have to answer a follow up question.
- You must answer all questions.




How to save an assessment

- You can save your changes by selecting the  button in the bottom left corner of the page.

How to continue an assessment

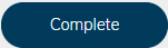
- On the home “Your sites” table, select the  button in the site’s actions

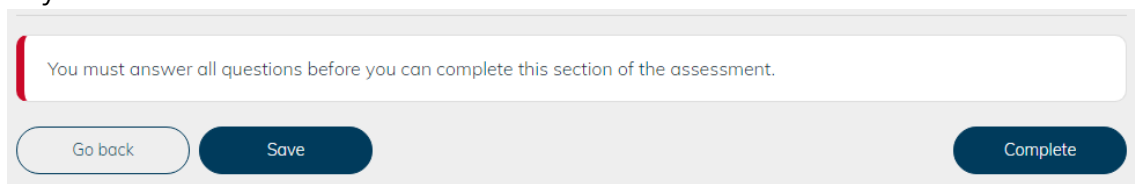


Type	Site name	Status	Maturity & Score	Actions
	Bristol Office	Assessment in progress <div><div></div></div> 16%	-	 

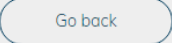
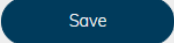
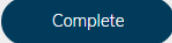
Items per page: 10 1 - 1 of 1 < >

How to complete an assessment

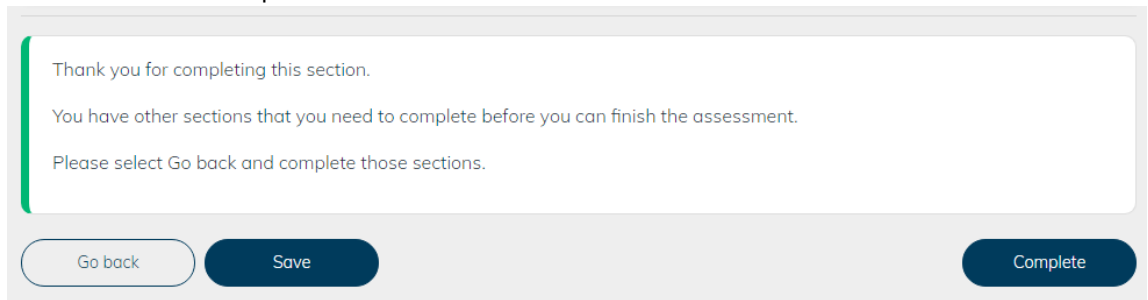
- You must answer all questions and follow up questions in all subject categories before you can complete the assessment.
- Once you have answered all questions select the  button in the bottom-right corner of the page.
- You will need to confirm that you wish to proceed to complete the assessment.
- Please note after completing the assessment you will no longer be able to change your answers.
- The following message will be displayed if you have not answered all question in your current section:



You must answer all questions before you can complete this section of the assessment.

- The following message will be displayed if you have completed a section but have other incomplete sections:




Thank you for completing this section.

You have other sections that you need to complete before you can finish the assessment.

Please select Go back and complete those sections.

Go back Save Complete


How to disclose an assessment

- You will need to have received an invite from a brand to share information with them.
- On the home “Your sites” table, select the  icon for the site you would like to disclose an assessment.
- You will need an active license for your site to continue, see “How to license a site” section in this guide.
- In the modal, ensure the switch is “on” in the “Evaluate” column for the brands you wish to disclose the assessment with.

- You can toggle the sharing of information by clicking on the switch 

Disclose site information


Close x



Bristol Office




Overall score: **52%**

Overall maturity progress: **Established**

Share with all 

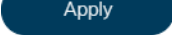
Toggle sharing all your data with the organisations below

Or control what you share with the organisations below

Organisation name	Requested date	Evaluate	Scorecard	Advance	Status
Brand1	05 August 2021				Ready to share


Select "Apply" to update your sharing preferences. Items that you are already sharing will not be re-shared.

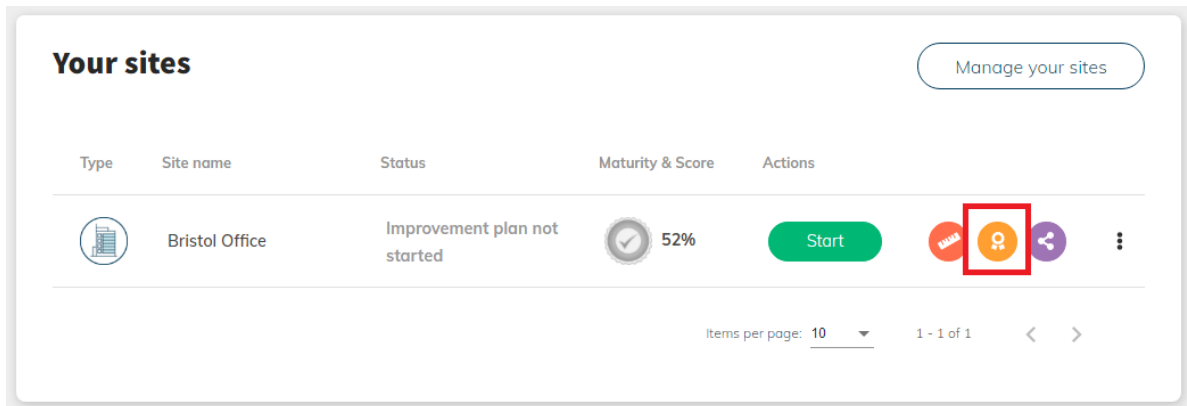
Apply
Cancel

- When you have finished making changes, select the  button to update your sharing preferences.

Scorecard





How to view a scorecard



- You will need to have created a site and completed an assessment for the site prior to viewing a scorecard.
- On the home “Your sites” table, select the  button in the site’s actions.



Maturity progress and badges

- A maturity badge is awarded for your overall score in the Evaluate assessment.
- Maturity badges are also awarded for each subject and subject category in the assessment.
- The following badges are awarded:

Score	Maturity progress	Badge
0%	Not started	
1 – 25%	Initiating	
26 – 50%	Progressing	
51 – 75%	Established	

76 – 89%	Leading	
90 – 100%	Vanguard	

How are my scores calculated?

- Your scores are calculated using the following methodology:

Score type	How it is calculated
Best practice score	Best practice value assigned x Response category value assigned
Category score	Sum of the points for each best practice question responded to) / ((Total points possible for the category) - (sum of possible points for best practice questions)) X 100
Subject score	Average of the subject categories
Overall score	Average of the subject scores

How the peer average is calculated



- The peer averages show how well you are performing against your peers in your industry segment and are calculated as follows:

Average type	How it is calculated
Peer average overall score	Sum of all Responders' overall scores within an industry segment / number of Responders in an industry segment
Peer average subject score	Sum of all Responders' subject-specific scores within an industry segment / number of Responders in an industry segment

Peer average category score


Sum of all Responders' category-specific scores within an industry segment / number of Responders in an industry segment

How to disclose a scorecard


- You will need to have received an invite from a brand to share information with them.
- On the home “Your sites” table, select the  icon for the site you would like to disclose a scorecard.
- You will need an active license for your site to continue, see “How to license a site” section in this guide.
- In the modal, ensure the switch is “on” in the “Scorecard” column for the brands you wish to disclose the scorecard with.
- You can toggle the sharing of information by clicking on the switch 

Disclose site information

Close x




**Bristol Office**

Overall score: **52%**
Overall maturity progress: **Established**

Share with all 


Toggle sharing all your data with the organisations below

Or control what you share with the organisations below

Organisation name	Requested date	Evaluate	Scorecard	Advance	Status
Brand1	05 August 2021				Ready to share


Select "Apply" to update your sharing preferences. Items that you are already sharing will not be re-shared.

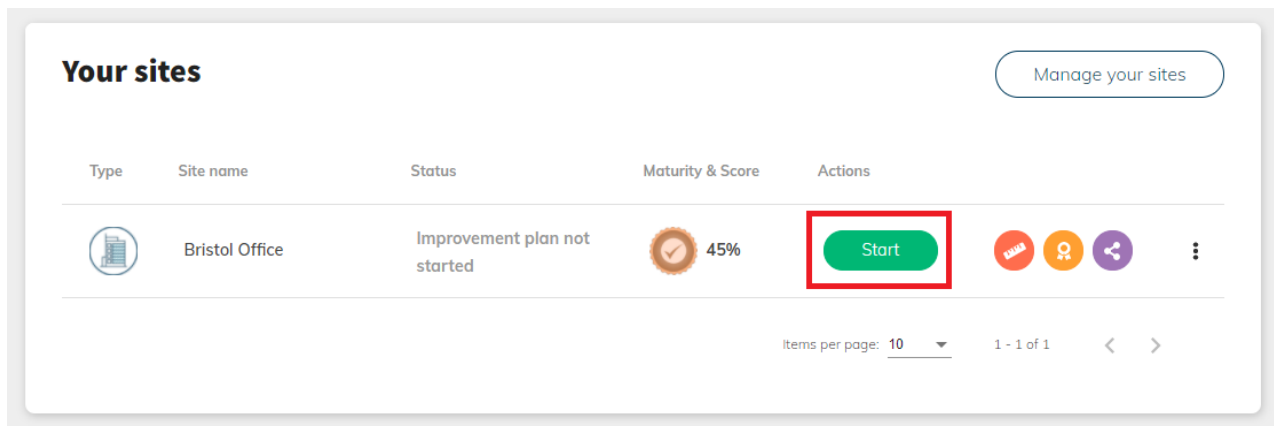
Apply Cancel

- When you have finished making changes, select the  button to update your sharing preferences.

Advance

How to start an improvement plan

- You will need to have created a site and completed an assessment for the site prior to starting an improvement plan.
- On the home “Your sites” table, select the  button in the site’s actions



How to set targets in an improvement plan

- For each best practice you are able to select an improvement target.
- The available targets for a best practice are based on your responses from the assessment. You will see up to 3 options available to select from the following:

Response option	Meaning
1	Researching options
2	Planning and implementation has started
3	Work in progress and/or implemented across partial applicable scope
4	Established practice and/or implemented across most applicable scope
5	Mature practice and/or implemented across applicable scope

- For each selected improvement target you will need to specify the actions and/or steps you plan to take to achieve the target.
- You can unselect an improvement target by selecting the X icon.

Efficiency Select best practices you plan to improve on by selecting an improvement target

HVAC

Reduce the need for/use of HVAC systems

Please specify the actions and/or steps you plan to take to achieve the improvement target *

0 1 2 3 X 4 5

You & peer average Target

Paragraph B I U A x₂ x² I_x ☺ - = : :

LOW OPPORTUNITY VALUE

Opportunity value

- Each best practice has been given a best practice opportunity value to help you prioritise improvements.
- The opportunity value of a best practice can be Low, Medium, or High.

Score check

- You are able to see how your selected targets impact your scores and benchmark positions by clicking the [Score check ^](#) on the right side of the page.
- This opens the score check mechanism which will change dynamically based on the selections you make.

How to save an improvement plan







- You are able to save your changes by selecting the [Save](#) button in the bottom left corner of the page.

How to continue an improvement plan

- On the home “Your sites” table, select the [Continue](#) button in the site’s actions



Your sites

Manage your sites

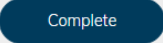
Type	Site name	Status	Maturity & Score	Actions
	Bristol Office	Improvement plan in progress	 45%	<div>Continue</div> <div>     </div>

Items per page: 10

1 - 1 of 1

How to complete an improvement plan

- Once you have finished setting improvement targets, you are able to complete the improvement plan by clicking the  button in the bottom-right corner of the page.
- You will need to confirm that you wish to proceed to complete the improvement plan.
- Please note after completing the improvement plan you will no longer be able to change your improvement selections.
- The following message will be displayed if you have not specified the actions and/or steps you plan take for improvement targets you have selected in your current section:



You must answer all questions before you can complete this section of the assessment.

Go back

Save


Complete

How to disclose an improvement plan

- You will need to have been invited as a supplier to a brand in order to share information with them.
- On the home “Your sites” table, select the  icon for the site you would like to disclose an improvement plan.
- You will need an active license for your site to continue, see “How to license a site” section in this guide.
- In the modal, ensure the switch is ‘on’ in the ‘Advance’ column for the brands you wish to disclose the improvement plan with.
- You can toggle the sharing of information by clicking on the switch 

Disclose site information

Close x



Bristol Office

Overall score: **45%**

Overall maturity progress: **Progressing**

Share with all ☒

Toggle sharing all your data with the organisations below

Or control what you share with the organisations below

Organisation name	Requested date	Evaluate	Scorecard	Advance	Status
Freshmart	10 July 2021	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Ready to share


Select "Apply" to update your sharing preferences. Items that you are already sharing will not be re-shared.

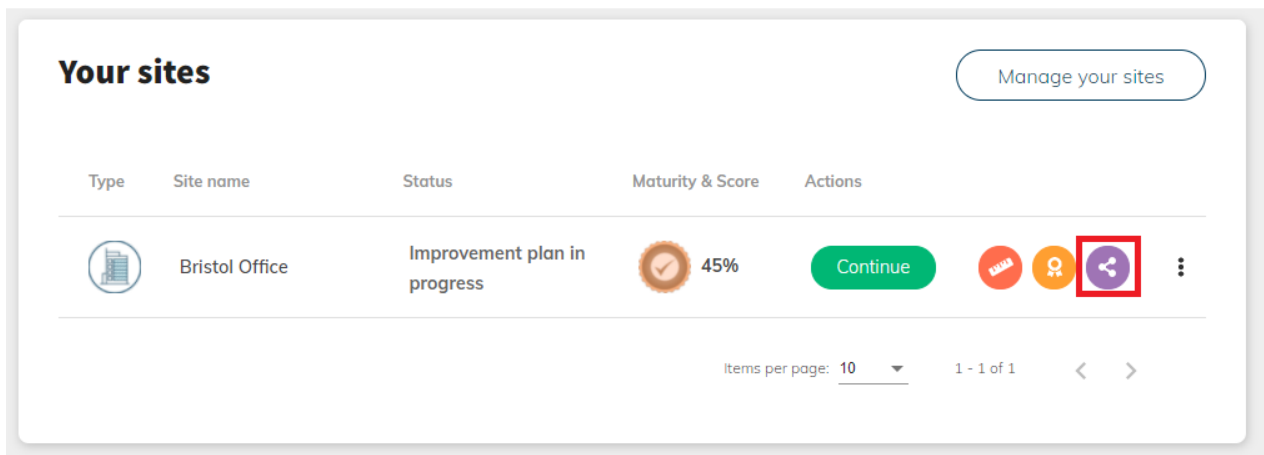
ApplyCancel

- When you have finished making changes, select the Apply button to update your sharing preferences.



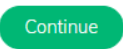




Disclose

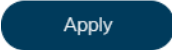

How to disclose my site information

- You will need to have been invited as a supplier to a brand in order to share information with them.
- On the home “Your sites” table, select the  icon for the site you would like to disclose information for.
- You will need an active license for your site to continue, see “How to license a site” section in this guide.




The screenshot shows a table titled "Your sites" with a "Manage your sites" button in the top right. The table has five columns: Type, Site name, Status, Maturity & Score, and Actions. There is one row for "Bristol Office". The "Status" is "Improvement plan in progress", and the "Maturity & Score" is "45%". The "Actions" column contains several icons: a green "Continue" button, a red "Ready" button, a yellow "Ready" button, a purple "Share" icon (highlighted with a red box), and a vertical ellipsis menu icon. Below the table, there is a pagination bar showing "Items per page: 10" and "1 - 1 of 1".

Type	Site name	Status	Maturity & Score	Actions
	Bristol Office	Improvement plan in progress	 45%	    

- In the modal, you are able to set which site information you share with which brands.
- By default, all site data will be set to share with all brands you are a supplier to. Please note if you haven't previously shared information for this site, this information is not shared until you select the  button.
- For brands you have not shared with before, a 'Ready to share' status is shown.
- You can control what is shared with each brand by toggling the switch  in the 'Evaluate', 'Scorecard' and 'Advance' columns.

Disclose site information

Close x



Bristol Office

Overall score: 45%

Overall maturity progress: Progressing

Share with all

☒

Toggle sharing all your data with the organisations below

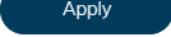
Or control what you share with the organisations below

Organisation name	Requested date	Evaluate	Scorecard	Advance	Status
Freshmart	10 July 2021	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Ready to share

Select "Apply" to update your sharing preferences. Items that you are already sharing will not be re-shared.

Apply

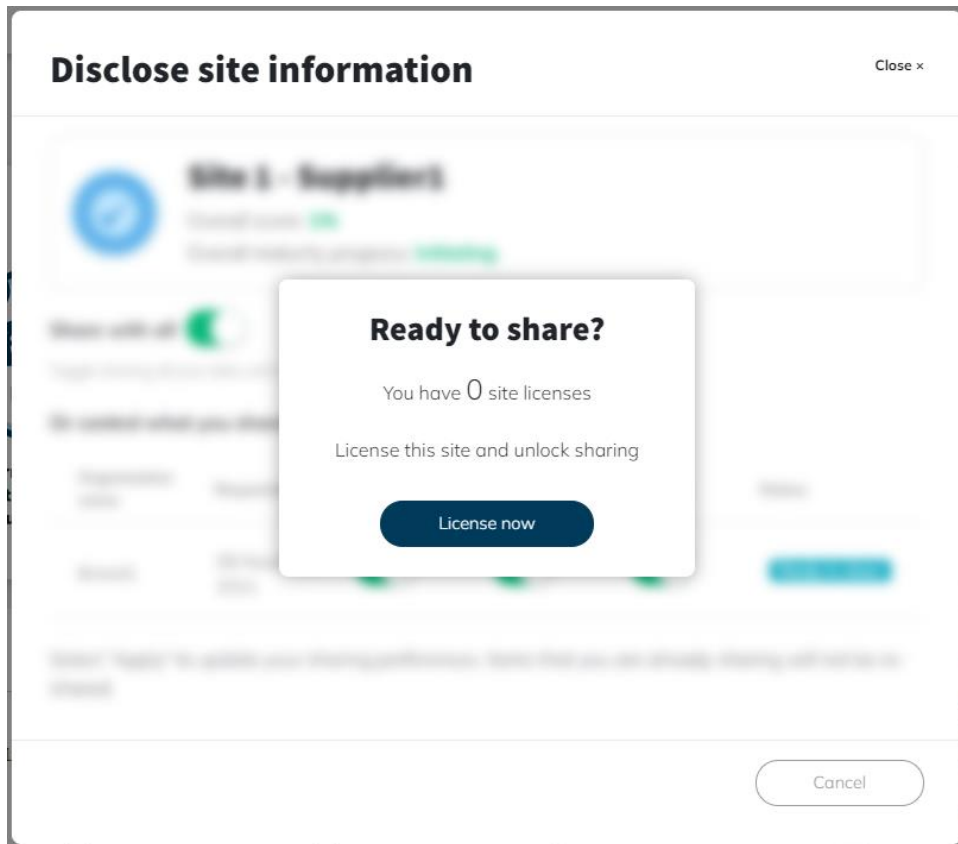
Cancel

- When you have finished making changes, select the  button to update your sharing preferences.

How to license a site

- To disclose your site information with requesters you will need to subscribe to ESG LEAD and activate a site license.

- Select “License now” to subscribe.



- You can select how many site licenses you would like to subscribe for. Each site needs a license to disclose its information.

License your sites

Close x

Subscribe to a site license plan

£1725 *

Billed yearly

£575 per site up to 5
£520 per site up to 10
£475 per site up to 20
£400 per site 21+

Number of sites

-
3
+

Select

* Plus applicable taxes

Benefit from

- ✓ BRCGS approved methodology and ESG badges
- ✓ Exclusive, unlimited sharing with your customers
- ✓ Control over who sees your ESG Lead Assessment, Scorecard and Improvement Plan
- ✓ Invitations to advanced ESG best practice performance and solutions events with BRCGS, Ecodesk and selected partners

Plus continue to benefit from

- ✓ Peer-to-Peer and Site-to-Site benchmarks
- ✓ Best practice content curated for your industry sector
- ✓ Regular best practice content updates from ESG experts
- ✓ Safe and secure storage of your ESG performance record


Cancel

- You will be directed to our checkout. Follow the on-screen instructions.

← **ESGLEAD**

Subscribe to ESG LEAD

£1,725.00 per year



ESG LEAD

Qty 3, Billed yearly

£1,725.00





£575.00 each


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Card information

1234 1234 1234 1234    


MM / YY CVC 

Name on card

Country or region

United Kingdom

Postal code

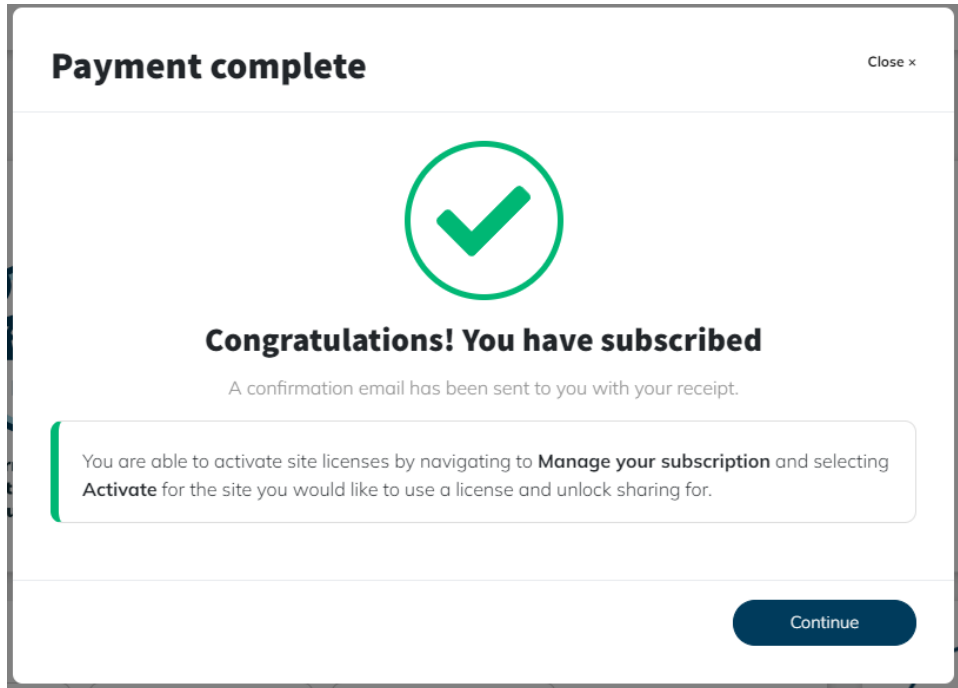
☐ Save my info for secure 1-click checkout 

Pay faster on Rob Test and thousands of sites.

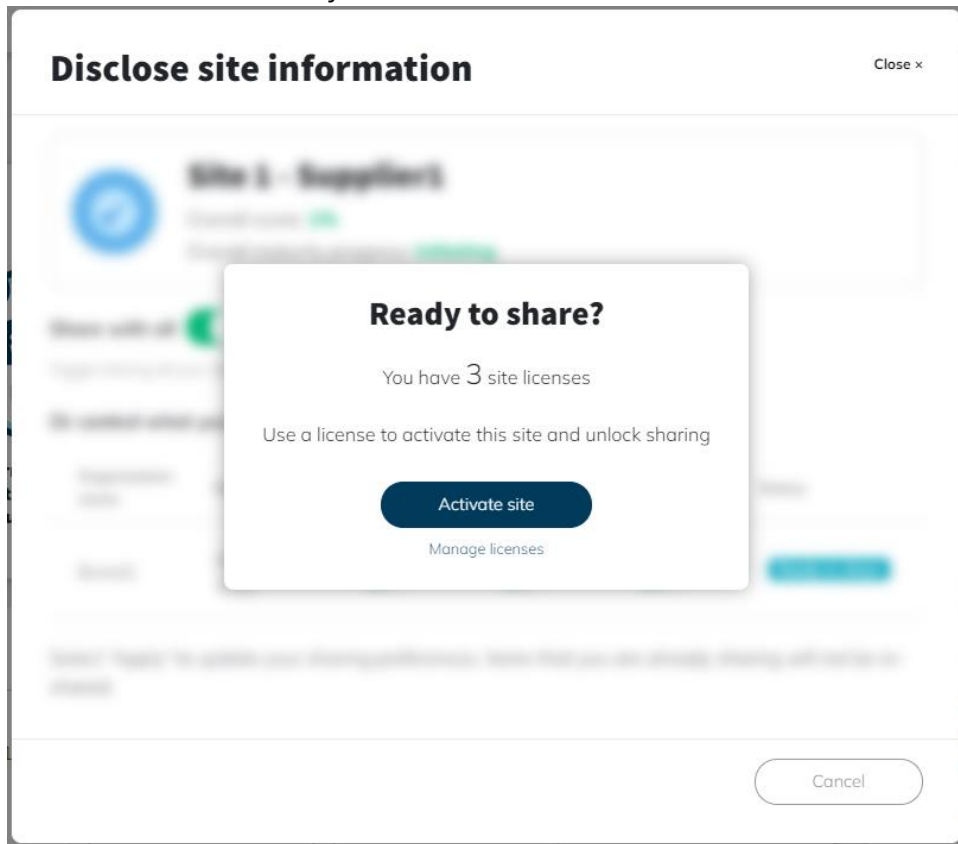
Subscribe

By confirming your subscription, you allow Rob Test to charge your card for this payment and future payments in accordance with their terms.

- Once you select subscribe you will be billed for your first year's subscription immediately. The subscription will automatically renew 1 calendar year after and you will be billed again for another year.
- On successful payment you will see the message below, select "Continue".

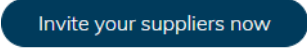


- You can now Activate your site license.



Invite your suppliers

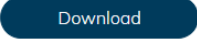
How to invite your suppliers

- If you have yet to invite suppliers, a tile will be shown on the home page. Select the  button to proceed to invite your suppliers.



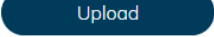
- There are 3 steps you will need to carry out in order to invite your suppliers:
 1. Download the contact list template
 2. Complete contact list template and upload
 3. Confirm and we'll send invites to contacts
- Prior to carrying out the above 3 steps you will need:
 - A list of contacts exported from your CMS, database or other file system
 - For each contact you need an email address, a contact name and an organisation name
 - Microsoft Excel or other spreadsheet software

Step 1: Download the contact list template

- Click on the  button to download the contact list template. This will download a copy of the template to your machine.

Step 2: Complete contact list template and upload

- Open the downloaded contact list template in Microsoft Excel (or similar) and for each supplier complete the contact name, email address and organisation name.

- Once you have completed the template, select the  button and locate the file on your machine.
- If there is an error in the template, a message will be displayed with what is required to resolve the error.

Please fix the following mistakes and re-upload the template:

- Contact name is missing on row 2
- Organisation name is missing on row 4

- If there are no errors in the template, the following message will be displayed along with the uploaded supplier contact information.

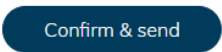
Upload successful. Please check you are happy with your contact list below.

Email address	Contact name	Organisation name
kristopher.massey@supplier1.con	Kristopher Massey	Supplier 1 Inc.
jacquelyn.walton@supplier2.con	Jacquelyn Walton	Supplier 2 Inc.
sylvia.myers@supplier3.con	Sylvia Myers	Supplier 3 Inc.

Items per page: 10
1 - 3 of 3

- If you wish to make any changes, you will need to update the contact list template in your spreadsheet software and re-upload.

Step 3: Confirm and we'll send invites to contacts

- Once you are happy with the uploaded contacts, you can proceed to send the invitation emails.
- You will be shown the email communication which will be sent. Please note that the email content cannot be edited.
- Selecting the  button at the bottom of the page will proceed to send the invitation emails and displays a message when the process is complete:



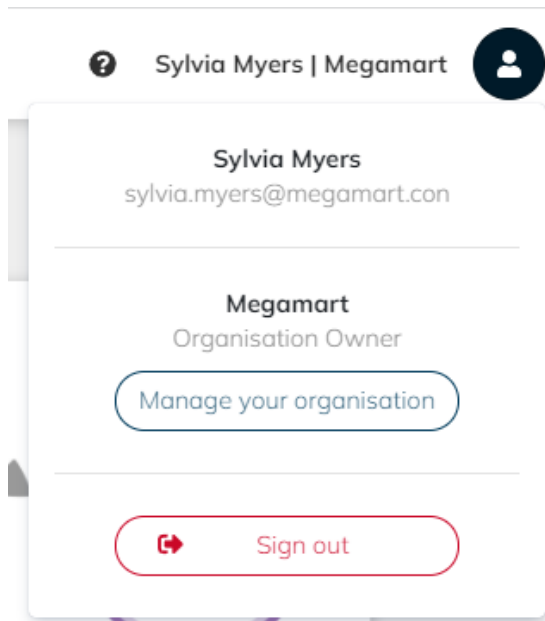
Invitation emails sent


Continue

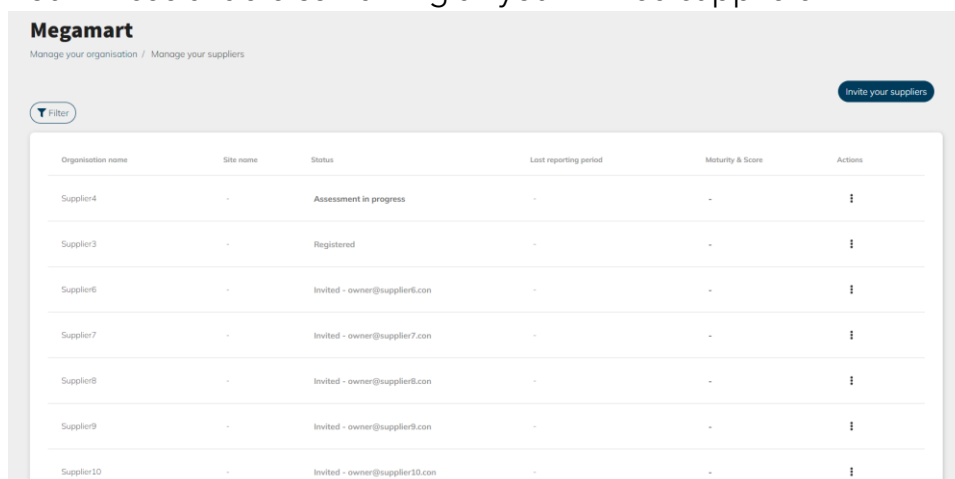
Manage your suppliers








How to view all your suppliers

- Sign in and select the user icon  in the top-right corner. This will display a dropdown menu with further actions.



- From the dropdown, select 
- On the “Manage your organisation” page select the “Manage your suppliers” tile.
- You will see a table containing all your invited suppliers.



Organisation name	Site name	Status	Last reporting period	Maturity & Score	Actions
Supplier4	-	Assessment in progress	-	-	
Supplier3	-	Registered	-	-	
Supplier6	-	Invited - owner@supplier6.con	-	-	
Supplier7	-	Invited - owner@supplier7.con	-	-	
Supplier8	-	Invited - owner@supplier8.con	-	-	
Supplier9	-	Invited - owner@supplier9.con	-	-	
Supplier10	-	Invited - owner@supplier10.con	-	-	

- If a supplier has shared information with you, you will see the Site name, Last reporting period and Maturity & Score for that site

- Select the actions menu button for the site to view its scorecard, assessment or improvement plan. Remember these will only be available if your supplier has selected to share this information with you.

Supplier2	Site 2	Improvement plan in progress	5th Oct 2020 - 4th Oct 2021	22%	⋮
Supplier1	Test Site 1	Improvement plan complete	12th Sept 2020 - 11th Sept 2021	35%	View scorecard View assessment View improvement plan

- You can filter the table by selecting the Filter button and selecting the statuses you wish to filter by.

Filter

Improvement plan not started ✕

Improvement plan in progress ✕

Improvement plan complete ✕

Site name	Status	Last reporting period
-	Assessment in progress	-
Site 2	Improvement plan in progress	5th Oct 2020 - 4th Oct 2021
Supplier1 Test Site 1	Improvement plan complete	12th Sept 2020 - 11th Sept 2021
Supplier2 Site 3	Improvement plan not started	5th Oct 2020 - 4th Oct 2021

How to invite more suppliers

- You can invite more suppliers by selecting the “Invite your suppliers” button.

Invite your suppliers

Last reporting period	Maturity & Score	Actions
-----------------------	------------------	---------

- You can follow the same process as detailed in “Invite your suppliers” section of this guide.
- When you upload the contact spreadsheet for a second time you will be notified if there are any already invited email address and the row they are on.

January 2022

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Version 1.1

- Make sure to remove any contacts that have already been invited and upload the spreadsheet again.

manage your organisation / manage your suppliers

Step 1: Download the contact list template

Download

Step 2: Complete contact list template and upload

Make sure each contact has a valid email address, a contact name and an organisation name.

Upload

Please fix the following mistakes and re-upload the template:

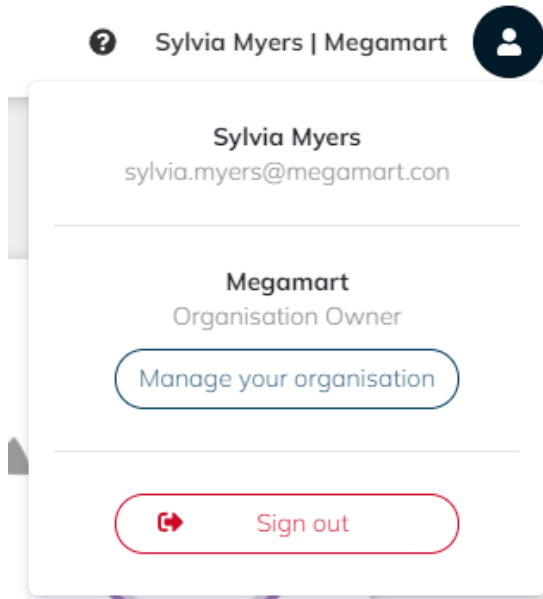
- Email address already invited on row 2
- Email address already invited on row 3
- Email address already invited on row 4
- Email address already invited on row 5
- Email address already invited on row 6
- Email address already invited on row 7
- Email address already invited on row 8
- Email address already invited on row 9
- Email address already invited on row 10
- Email address already invited on row 11
- Email address already invited on row 12
- Email address already invited on row 13

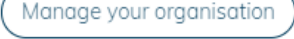
- Your new suppliers will be added to your existing suppliers list.

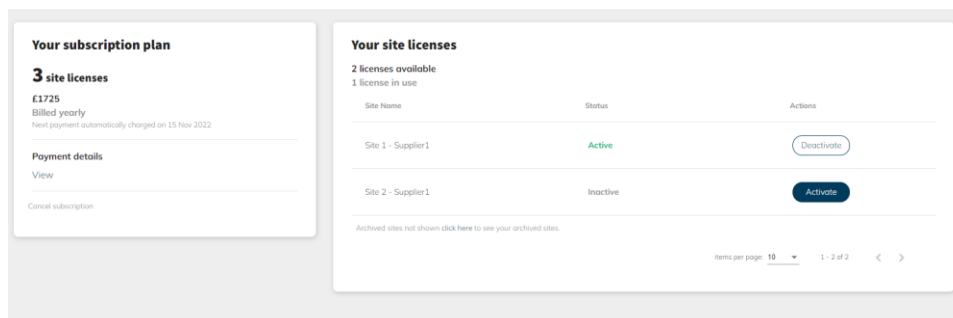
Manage your subscription

How to view your current subscription and site licenses

- Sign in and select the user icon  in the top-right corner. This will display a dropdown menu with further actions.

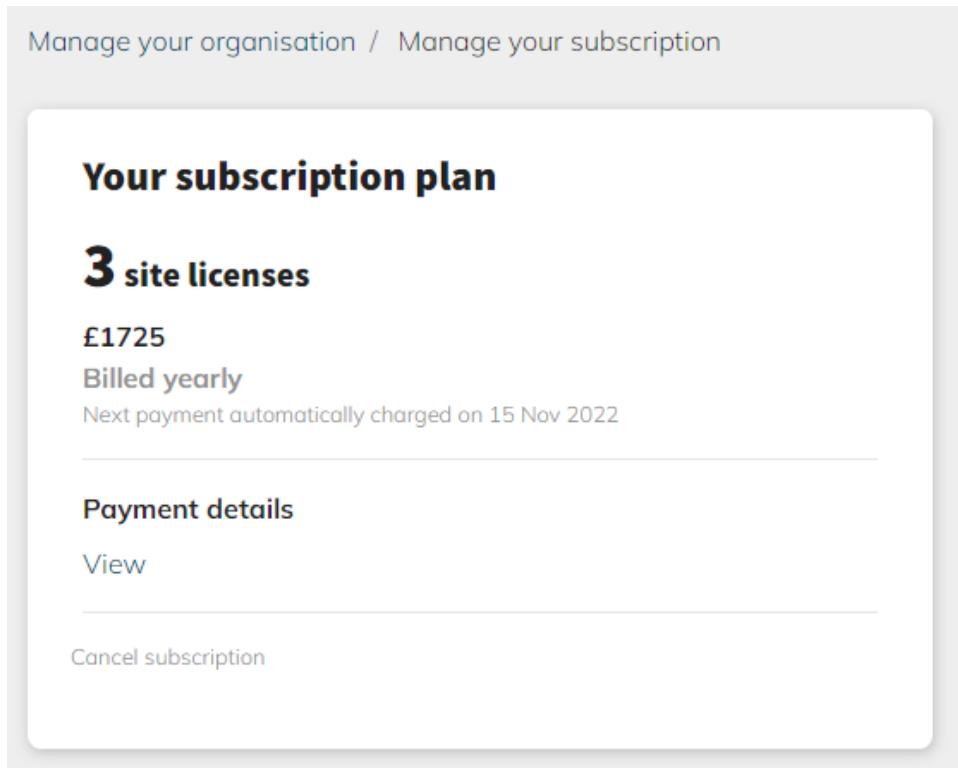


- From the dropdown, select 
- On the "Manage your organisation" page select the "Manage your subscription" tile.
- From here you can view your current subscription details, including:
 - Number of site licenses
 - Yearly subscription cost
 - The subscription renewal date
 - A list of your sites and license status

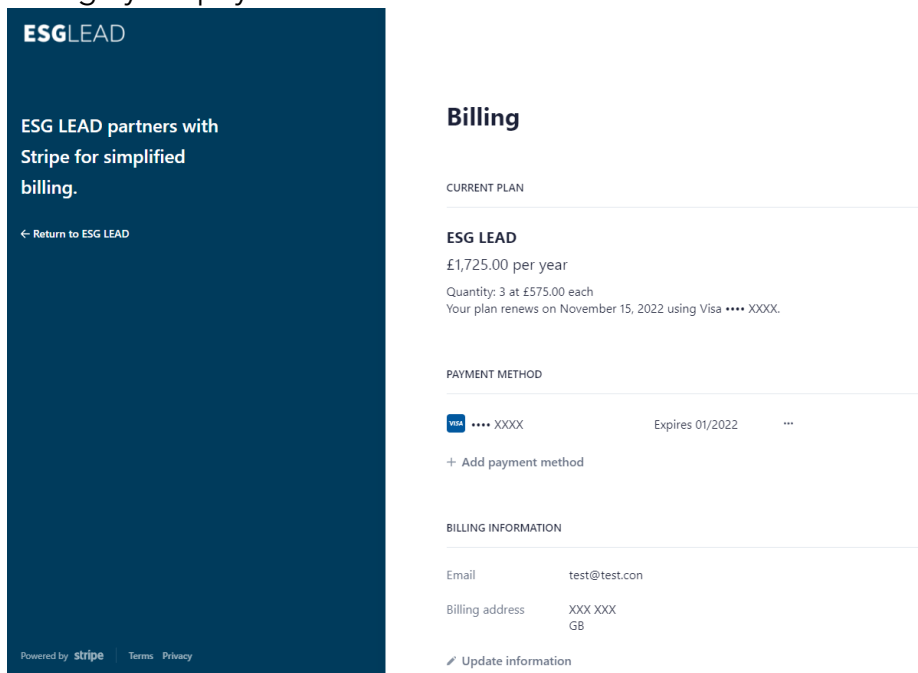


How to change your payment method

- Navigate to Manage your subscription and select “View” under Payment details.



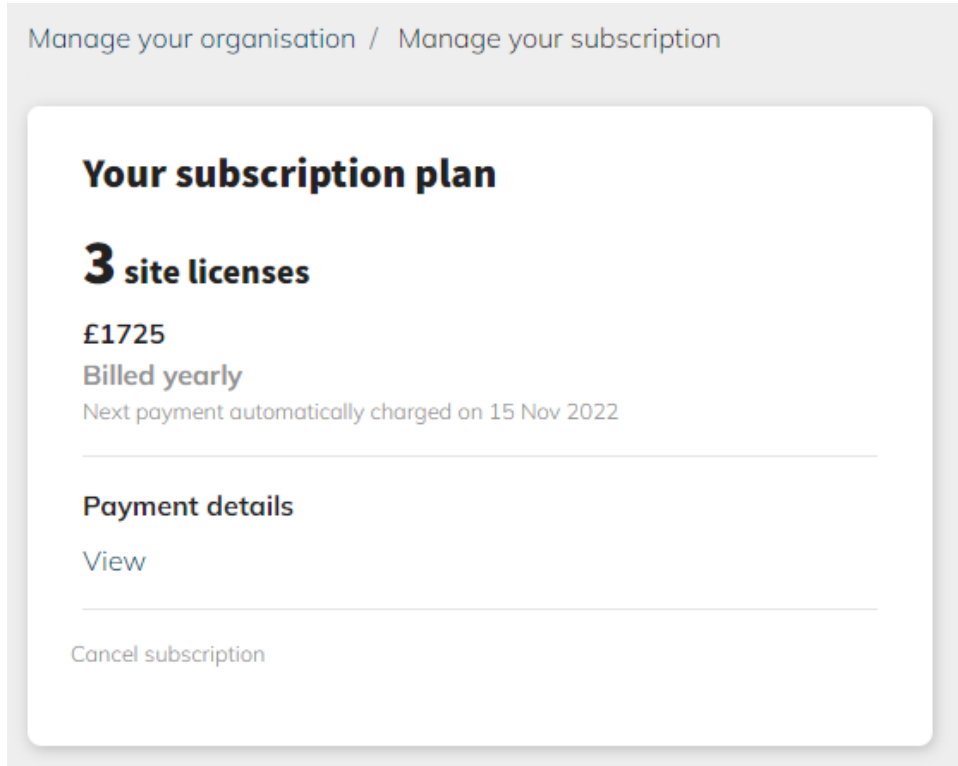
- You will be taken to your billing page. Follow the on-screen instructions to change your payment method.



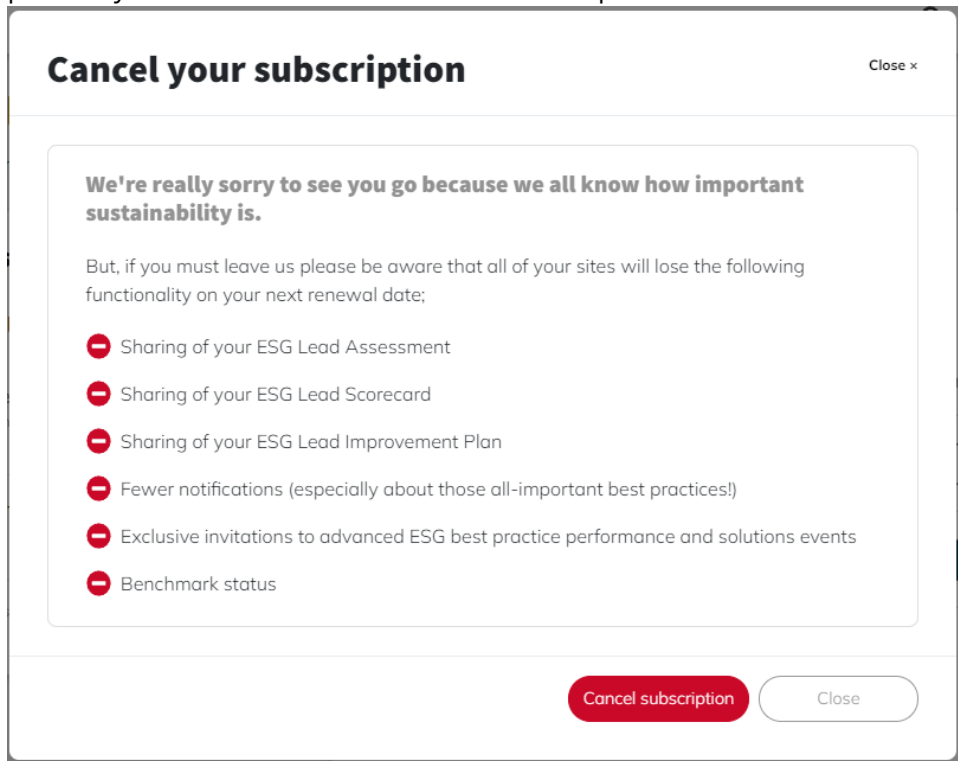
- Once updated select “Return to ESG LEAD”.

How to cancel your subscription

- Navigate to Manage your subscription and select “Cancel subscription”.

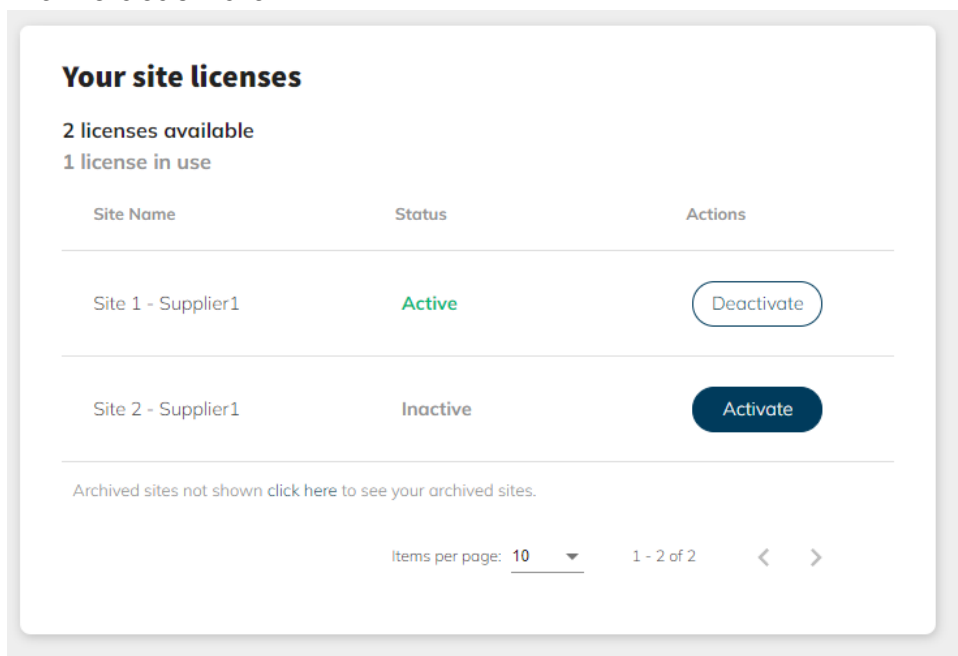


- Confirm by selecting “Cancel subscription”. At the end of your current billing period you will lose access to the subscription benefits.



How to deactivate a site license

- Navigate to Manage your subscription and select “Deactivate” for the site you wish to deactivate.



- You can deactivate and activate site licenses at any time.
- Please be aware that when you deactivate a site license, any organisations you previously shared information with will no longer have access to that information.