



Next Level Investor Relations LLC

Taking Your Investor Relations and ESG Stakeholder Communications to the Next Level

Sustainability Benchmarking Service

Sustainability has rapidly gone mainstream. ⁽¹⁾ As of 2018, 26% or \$12.0 trillion – one in four dollars – of the \$46.6 trillion total assets under management in the United States now incorporates ESG in investment decision-making. ⁽²⁾ Compared to one in nine dollars as of 2014, this increasing capital asset attention is creating an imperative for management to strategically communicate ESG/Sustainability performance and competitive leadership to investors and other important stakeholders.

Sustainability Benchmarking is where we start to prioritize your efforts and to apply your company's Sustainability program specifics for ROI within a focused Investor Relations strategy and messaging. ⁽³⁾ We identify offense and defense communications needs.

Sustainability is the universal or umbrella term that covers many related acronyms. ⁽⁴⁾ The most common: ESG (broadly used in the U.S.), SRI (broadly used in Europe), and CSR.

NLIR Sustainability Benchmarking Service includes review of:

- Our client company and comparable peers on four main communications disclosure vehicles – the corporate sustainability report, company (and IR) web site, annual report, and proxy. We compare ESG disclosure and positioning from an IR vantage.
- Other collaterals and non-sector companies for added comparison and examples.
- Results, prioritized for additional focus and direct communications comparisons, e.g. investor conferences, road shows, webcasts, etc., as identified and appropriate.

Our results:

- Identify actionable recommendations for both the IR and Sustainability functions.
- Highlight strategic priorities for your company in the expanding Sustainability field.
- Bias toward the “E” of ESG, energy and environmental, plus economics. Call it “E³”.

We capture:

- ✓ Meaningful correlation efforts used by the benchmark peers to address sustainability-focused investment analysis and investor needs.
- ✓ First mover advantage and leader positioning opportunities.
- ✓ Competitor best practices and positioning, and importantly what they are not doing.

(1) <https://www.alpha-sense.com/blog/sustainability-in-the-mainstream-2286/>

(2) <https://www.ussif.org/trends> and <http://www.ussif.org/sribasics>

(3) <https://www.alpha-sense.com/blog/esg-sustainability-are-companies-realizing-real-return-on-their-investment-2551/>

(4) <http://www.nextlevelinvestorrelations.com/articles.htm>

Our clients use the results to:

- Identify appropriate Sustainability applications into IR communications strategy.
- Focus internal Sustainability team members on strategically impactful efforts.
- Form the basis for ongoing development of IR/Sustainability enhancements.

Our approach:

- All benchmarking reviews are conducted personally by Pam Styles, Principal, whose senior IR and Sustainability perspective provides the advantage of knowing what to look for beyond simple benchmarking observations to convey to our client.
- Organizes the benchmarking project results so they can provide an informed foundation and reference, which can then be used to move ahead quickly in related IR strategy development and communications execution.
- We introduce our clients to sub-area experts within the Sustainability field, as appropriate and strategically timely, in the course of our ongoing relationship.

Our deliverables:

- A formal report is typically delivered within 60 days from the project start.
- The final report contains: an overall executive summary, findings and recommendations, plus stand-alone reports for each disclosure vehicle reviewed; important examples and other discoveries by appendix.
- Include interim discussions of observations that we feel appropriate to convey to you prior to delivery of the formal report, in context with your timing considerations.

We look forward to discussing our services to help you advance your Sustainability ROI. Please contact Pam Styles at 703-864-5711, p.styles@nextlevelinvestorrelations.com.

We welcome your inquiry.

About Us

***Next Level Investor Relations LLC** is a uniquely positioned consultancy with dual senior Investor Relations and Sustainability concentrations. We help clients bring their investor relations, stakeholder relations, corporate communications and supporting efforts to the next level. We focus on both traditional IR issues and leading-edge opportunities within the rapidly-expanding mainstream ESG / Sustainability investment community. No matter where your company is on the spectrum of developed relations or communications programs, NLIR will serve as a sounding board, or partner and consultant in order to identify efficient solutions using internal resources or NLIR to facilitate execution of appropriate initiatives. For further information about NLIR, please visit: www.nextlevelinvestorrelations.com.*