ESG Software RFP Checklist

Questions to put to every vendor, in the same words

Send the same written questions to every vendor and score the answers on the same scale. Mark each item Must have, Should have or Nice to have before you send it. Ask for answers in writing.

1. Fit and coverage

- [ ] Which frameworks do you support today (CSRD / ESRS, VSME, BRSR, GRI, ISSB, others)? Which are on the roadmap, with dates?
- [ ] How are framework updates delivered, and who pays for them?
- [ ] Can you support multiple legal entities and a consolidated report?

2. Data collection

- [ ] How do data owners submit, review and approve data?
- [ ] Can we import from spreadsheets, ERP, HR and utility systems? Which connectors exist?
- [ ] How are supplier requests sent and tracked?

3. Calculations

- [ ] Which emission factor sets are used, and how often are they updated?
- [ ] Can we see and export the calculation behind any figure?
- [ ] How are estimates and data quality flagged?

4. Audit trail and assurance

- [ ] Is every change logged with user and time?
- [ ] Can an assurance provider be given read-only access?
- [ ] Have customers been through assurance using your outputs? Can we speak to one?

5. Reporting and tagging

- [ ] What report formats are produced?
- [ ] Do you support digital tagging of the sustainability statement, now or planned?
- [ ] Can we edit narrative text and keep a version history?

6. Security and data

- [ ] Where is data hosted? What certifications do you hold?
- [ ] Single sign-on, role-based access and multi-factor authentication?
- [ ] Can we export all our data in a usable format on exit?

7. Implementation and support

- [ ] Typical implementation time for a company of our size?
- [ ] What is included in onboarding and what costs extra?
- [ ] Support hours, languages and response times?

8. Commercials

- [ ] Price per year for 3 years, split into licence, implementation, additional entities, users, support and connectors.
- [ ] Contract length, renewal terms and price increase limits.
- [ ] Termination rights and data return.

Guide: esglistings.com/esg-guides/esg-software-rfp-guide | Compare vendors: esglistings.com/esg-software

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