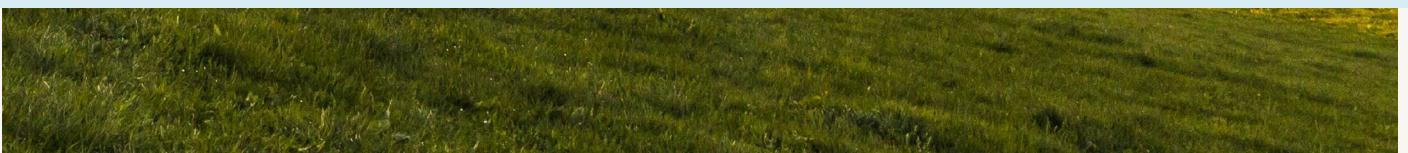# How to become a carbon hero: Easy steps to Net Zero

How to be a Net Zero organisation

Understand what's happening and what needs to be done

Contents

Introduction

How to be a Net Zero organisation

Are you struggling with the practicalities of measuring your organisation's carbon footprint? Or, just finding it hard to engage people across the organisation to help drive carbon expenses down? As always, here at Credera we love to help – and have hands-on experience to share in the name of saving you time and unnecessary carbon expense. In this white paper you will find some ideas that have helped us chart our own journey to Net Zero so far. Read on to understand what's happening and why your organisation needs to get this right now.

What's happening

Net Zero refers to the balance between the amount of greenhouse gas (GHG) produced and the amount removed from the atmosphere. We reach Net Zero when the amount we add is no more than the amount taken away.

Our view: consumers, shareholders and employees are looking to companies to lead on corporate responsibility. A de facto 'good company' is one that demonstrates its sustainability commitment and does not negatively impact future generations.

DID YOU KNOW?

The UK became the world's first major economy to set a target of being Net Zero by 2050.

The UK Government's target is to reduce the UK's carbon emissions by at least 68% by 2030, compared to 1990 levels.

Why now

For every day you can't see your organisation's impact, working towards the Net Zero goal becomes more challenging to manage. There is an early mover advantage to taking action and reducing your company's carbon impact on the climate emergency. You'll reduce carbon emissions and expense by acting now.

> " It's the right thing to do and now is the right time to do it.

Robyn Bechelet

CONSULTANT & NET ZERO CLOUD LEAD

A more sustainable future

Learning from experience

If you are currently measuring carbon emissions in a seamless way and focussing your energy on increasing sustainability then well done! We hope you'll find some food for thought here and thank you for your attention. If you are instead living in a mound of complex spreadsheets and an audit is taking months (with no time to spend on action plans to reduce carbon emissions) then we have news of a better way.

At Credera, we decided to investigate getting to Net Zero using Salesforce. Our view is that costs of investment will be offset by savings on admin. Also, there is that immediate gain of being able to better manage your carbon emissions because you can visually see where you are at – whenever you want.

Common goals we often hear...

We want to:

- Focus our energy on reducing carbon, not on counting it.
- Leave spreadsheets behind and have energy use automatically converted into carbon usage units.
- See our carbon cost in the here and now on a dashboard pulling live data.
- Gain critical insights about the energy our business is burning – so we can question the status quo and take action.
- View the impact of our carbon reduction action plans.
- Set milestones to manage performance against our targets.
- Collaborate on the platform – for audit trail and speed.
- Save more money by taking action than we are spending.

"
We want to measure our carbon emissions, quickly and easily. Then reduce them.

Anna Bedford
ACCOUNT DIRECTOR

Milestones on your journey

After four weeks of setting up your system for Scopes 1 & 2 + business travel, you will be able to:

- Visually see when energy use is unusually high
- Comply with global reporting standards
- Collaborate across the organisation (out of the box with Chatter messaging)
- Measure all your carbon footprints

Unlock these new possibilities:

Automatically compare the meter readings with your bills – get a notification of anything outside a variance you specify.

Enable suppliers / third parties to add data and communicate on that data via a portal.

Integrate Marketing Cloud to use campaigns to drive action internally and externally with broadcast messaging based on audience segments.
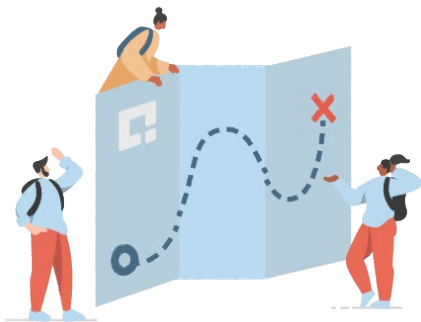
> " There are other options out there to help automate the process and store data in the cloud. We implement Salesforce. We hope that by sharing our learning, it will help you to weigh up your options.

Daniel Carpenter

FUNCTIONAL CONSULTANT

Getting started

Here's what we did

Before anything else – we asked for support from an internal sponsor at senior level and requested backing from our founders. All good. We formed a project team – we in effect became our own customer because another question we wanted to answer at the time was: "If we implement this for our customers what would the experience be like for them?"
And: "How can we make it as easy as possible?"

Here are the eight steps you can take to measure your carbon footprint in Salesforce Net Zero Cloud.

This section will give you those all-important insights to help you manage your environmental impact.

1 Load reference data

Salesforce Net Zero Cloud is preloaded with reference data that enables calculations which conform to the Greenhouse Gas (GHG) Protocol. This means raw data from bills can be added into the platform and it will literally do the maths to produce carbon footprint records.

There are several ways to get your data into the system:

01 Manually, literally bill-by-bill. This is Out Of The Box (OOTB) functionality.

02 CSV template – bulk upload yourself, also OOTB.

03 Integrate with finance systems (approval processes can be built in, allowing you to review unusually high bills). This method requires the kind of customisation we specialise in.

2 Create carbon inventory

Time to gather utility bills and travel records to record energy consumption for assets (buildings and vehicles) and travel activities. Plus, decide on the reporting period. This step encouraged us to consider our recording processes so that we set ourselves up for future success. This data is added to Energy Use records. A Carbon Footprint is a summary of Energy Use records.

3 Manage Building Energy Intensity

Building Energy Intensity (BEI) is a useful metric because it lets you use automatically-calculated averages to fill any gaps in your data (with just one click per gap). That means you can start to compare buildings to manage down a benchmark metric.

How that works is: You specify the size of the building. The platform works out an average energy intensity based on Energy Use records for that building and location. You can then set KPIs and targets to manage future energy consumption per building and take actions to get the BEI number down. And that is a big thought – how can you look into the future and take action to make it a brighter one?

Further down the line we believe, with customisation, the platform could predict the building intensity of a new building even at planning stages, or a building you want to lease in future. And the future is not that far away in this instance because Salesforce updates Net Zero Cloud with new functionality at least twice a year.

Salesforce developed Net Zero Cloud to measure its own carbon intensity and also works with the world's leading companies to do the same. Salesforce uses that collective knowledge to enhance core Platform capabilities over time. Essentially, we all benefit from a world-class dev team that is bringing new functionality to the Platform so everyone can use it. Certainly the power of AI is already available via Tableau CRM. We see that as an exciting option for modelling our future energy use, so that we can get everyone involved in using the greenest sources of energy we can.

4 Calculate carbon footprint

Now that the data is in, you can calculate your carbon footprint, see it visualised on a Climate Action Dashboard, as well as run reports for your stakeholders. Part of the story is complete.
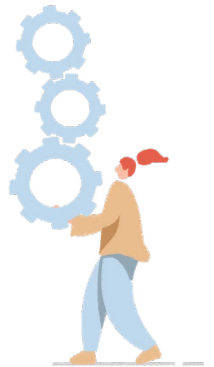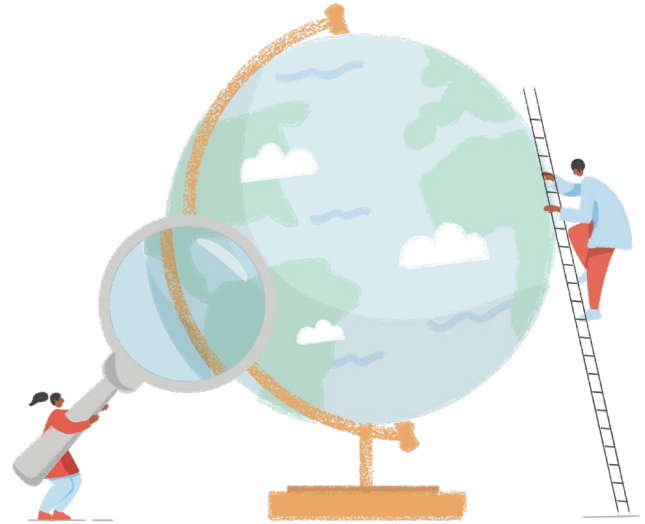
5 Manage Scope 3 value chain data

Categorise, visualise and account for the unique supply-chain emissions your company is indirectly responsible for. This is where your implementation partner can help you set up records that are unique to your business or industry sector. Once the relevant carbon factor has been matched with your Scope 3 emission item you can track with greatest precision.

Remember: Scope 3 emissions are all indirect emissions (i.e. not included in Scope 2) that occur in your organisation's value chain, including upstream and downstream emissions.
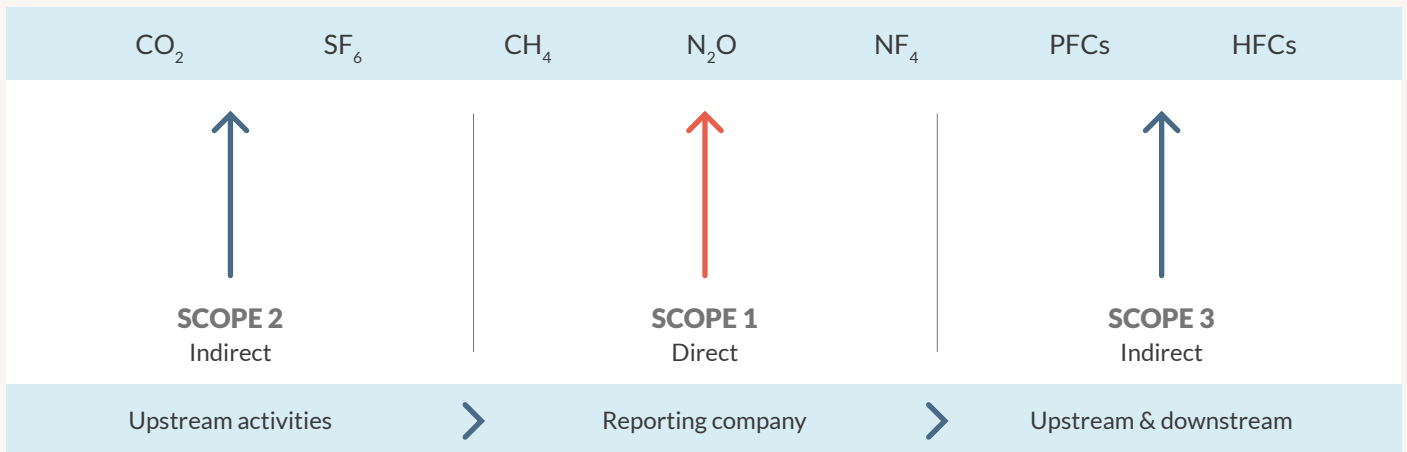
There are 15 categories of Scope 3 emissions. Salesforce gives examples of Scope 3 emissions, including:

- Purchased goods and services
- Capital goods
- Fuel and energy-related activities
- Business travel
- Employee commuting
- Use of sold products
- Investments

SCOPE 1	- Building emissions - Corporate jet travel - Company shuttles
SCOPE 2	- Purchased electricity for own use - Data center electricity consumption
SCOPE 3	- Capital goods - Purchased goods & services - Fuel and energy-related activities - Upstream transportation and distribution - Business travel - Upstream leased assets - Investments - Waste generated in operations *There are 15 categories of Scope 3 emissions.*

Greenhouse Gas (GHG) Emission scopes:

CO_2	SF_6	CH_4	N_2O	NF_4	PFCs	HFCs

SCOPE 2 Indirect	SCOPE 1 Direct	SCOPE 3 Indirect
Upstream activities	Reporting company	Upstream & downstream

> " Fast and simple to track — all a company needs is its procurement data. Net Zero Cloud provides a process of matching spending categories to spend-based emission factors and to Scope 3 categories. The results can be summarised by spend type and by vendor.
>
> – Salesforce about Scope 3

6 Manage the carbon accounting process

Net Zero Cloud comes with predefined stages that you can use while working through the process to complete carbon footprints. The stage is a required field on the Carbon Footprint record. You can view the stage for an individual record on the path or on the Kanban view in the Carbon Footprint tab. Your admin can modify the values in the stage field to meet your organisation's needs.

The carbon accounting stages are:

Asset Confirmation	The Sustainability Manager confirms whether to include an individual building or vehicle asset in the Carbon Footprint
Data Collection	Enter all Energy Consumption records; for example, monthly energy usage from utility bills
Data Gap Filling	For any missing energy consumption records, fill Energy Use data gaps using system estimates
Validation	Sustainability Manager determines the initial data looks correct
Renewable Energy Allocation	Renewable Energy Allocation information is added to the Energy Consumption records
Internal Audit	An internal auditor validates the Energy Consumption and Carbon Footprint information
External Audit	An external auditor validates the Carbon Footprint information
Finished	The validated Carbon Footprint record is complete

**7** **Gain insights from your carbon inventory data with Tableau CRM**

Tableau CRM gives you three pre-configured dashboards:

- Climate Action
- Business Travel Impact
- Sustainability Audit

You can run dashboards manually to see a live snapshot, or automatically run them at intervals of your choosing. Tableau CRM dashboards are an out-of-the-box feature of Sustainability Cloud and are pre-configured. This means as soon as Energy Use Records have been added to the platform you can look at your total carbon footprint.

TIP: Energy Use Records are used by Tableau for calculations, not Carbon Footprint Records, in order to avoid any counting anomalies.

Business Travel analysis
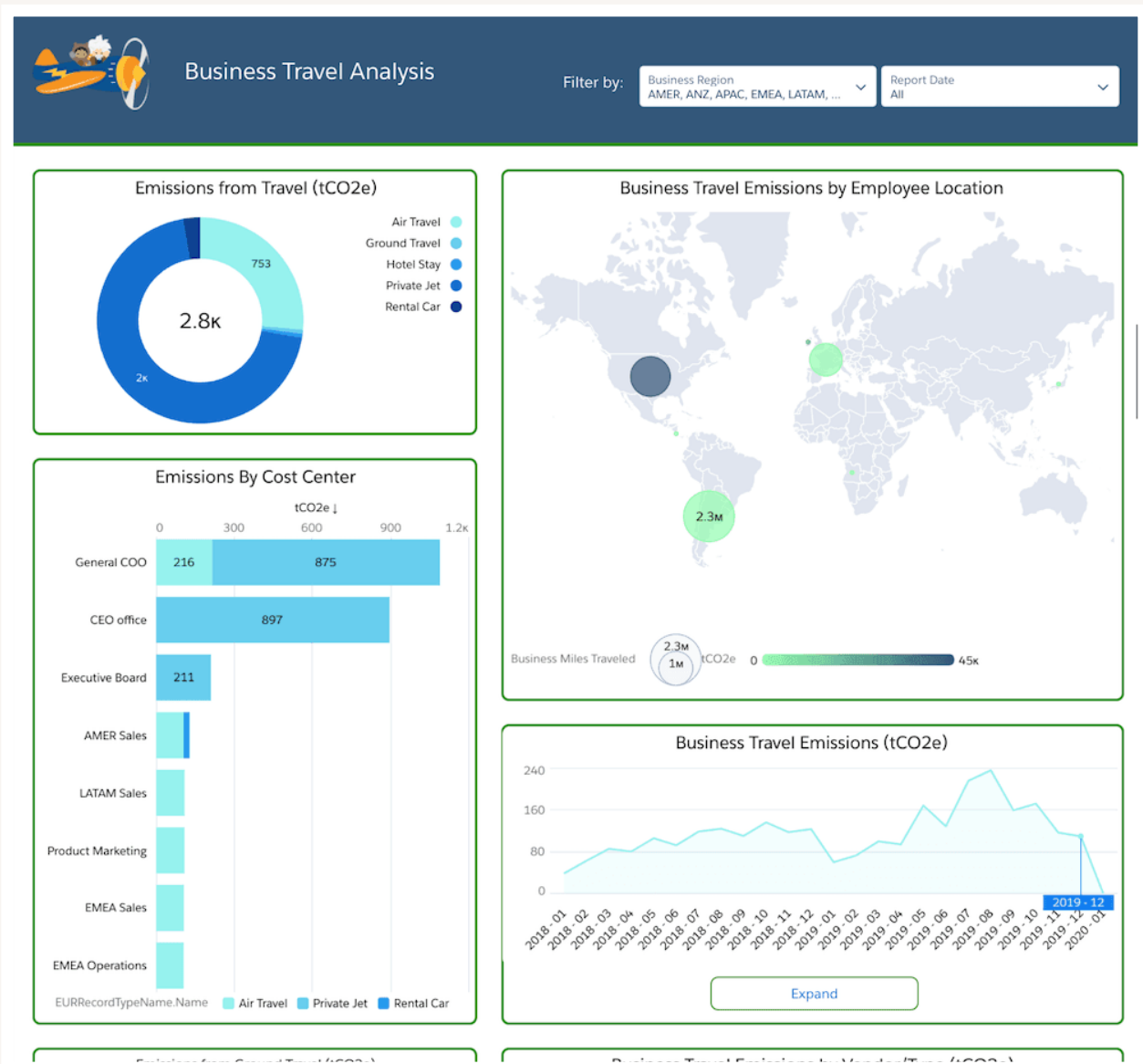
Climate Action dashboard

In the Climate Action dashboard, pages display data about your Carbon Footprint. Pages detail Energy Use, carbon intensity, and renewable energy data, by various metrics. The Business Travel Impact dashboard shows the carbon footprint of your business travel Energy Use records.
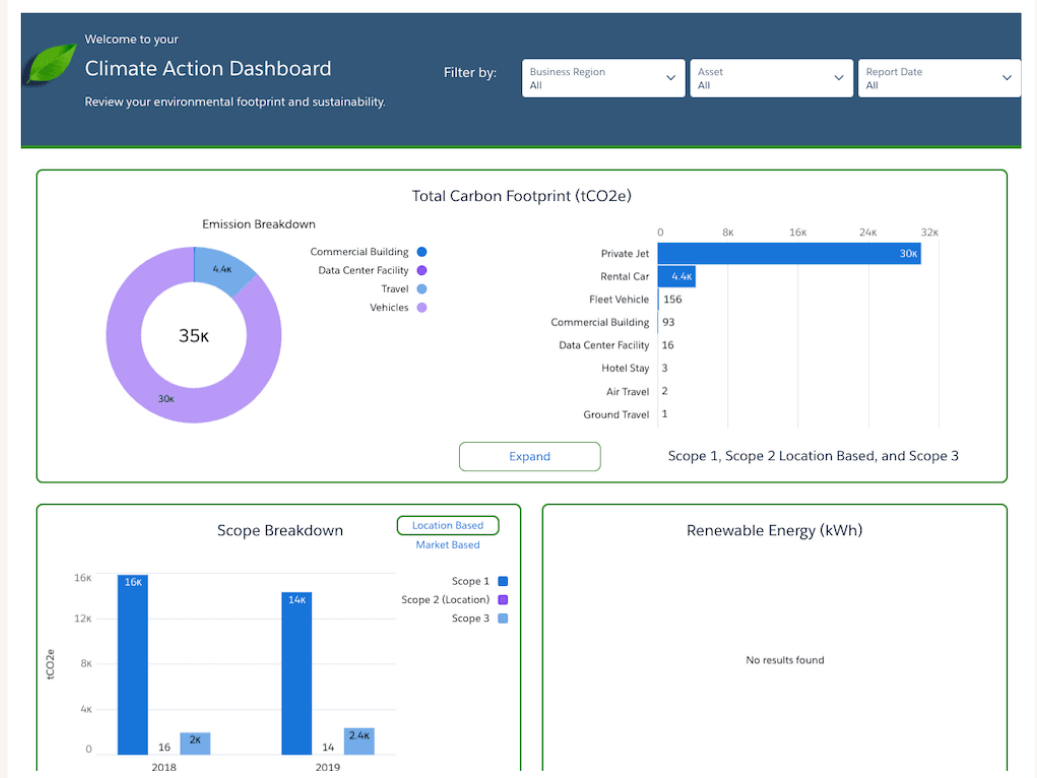
Sustainability Audit dashboard

In the Sustainability Audit dashboard, you can view:

- Charts and graphs about your company's greenhouse gas emissions
- Resource consumption
- Emission factors
- Renewable energy use
- Annual summaries of data for comparison

8 Report your Carbon Footprint

How you report your findings depends on the size and environmental impact of your organisation. You are now fully equipped to report to a government agency or in an annual report for shareholders and stakeholders. With Net Zero Cloud, you have all the information and tools to determine your climate action strategy. According to Salesforce, by this point:

- Calculations are accurate and complete
- You have the information required to evaluate risk and mitigation plans
- Information is readily available to auditors and executives
- You can track your environmental impact year over year

After those steps you can import previous Carbon Accounting Data for your year-on-year graphs in Tableau. Or you can create Salesforce Reports to interrogate the data further to ask business questions.

At Credera, we built the platform internally within a few weeks to understand its capabilities for ourselves. During this process we became convinced that our customers, other organisations and the environment can benefit too.

We offer a quick start solution to help you start measuring your carbon footprint in weeks rather than months and get on the front foot.

Why Salesforce technology

Cloud-based pre-configured software

Easy to implement

No infrastructure to roll out

Fast deployment

Easy to report on

GHG protocol emissions factors built-in

Can be integrated for third-party data entry

You are not on your own! We are here to help and our team is happy to invite you to a no-obligation free demo so you can see for yourself.

Counting your carbon is easier than you think. Ask our experts to help you.

It'll make even more sense when you see what it is all about and ask the questions you and your team have. If you are not quite there yet, we'd love to continue a sustainability conversation, listen to your pain points and contribute to ways of solving them together.

GET IN TOUCH

Contact us at
credera.com/contact

CREDERA

Credera is a one-of-a-kind consulting firm.

Our mission is to make an extraordinary impact on our clients, people, and communities.

Credera is a global consulting firm that combines transformational consulting, technology, and AI expertise to deliver valuable customer experiences and accelerated growth across a broad range of industries worldwide. Our one-of-a-kind, global boutique approach means we provide our clients with tailored solutions unique to their organization that can scale due to our extensive footprint.

Our mission is to make an extraordinary impact on our clients, our people, and our community. We believe it is this approach that has allowed us to work with and transform the most influential brands and organizations in the world, from strategy through to execution.

QUICK FACTS

1999
Year established

4,000
Employees globally

96%
Repeat client rate

LOCATIONS

Australia
Germany
India
New Zealand
United Kingdom
United States

CREDERA