How-To Guide: Creating a Multi-Level Engagement Map

Sustainable finance practitioners can use this "Engagement Map" framework to set multilevel, climate-focused engagement strategies across their firms.

How to Create an Engagement Map:

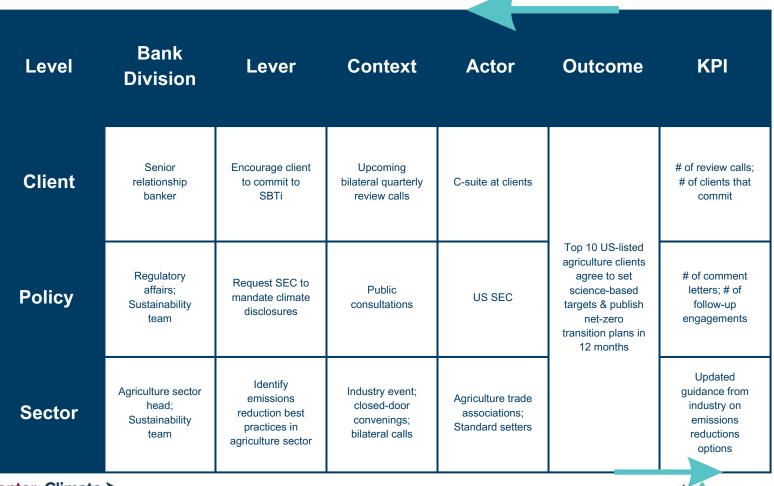
To implement multi-level engagement, sustainable finance teams can begin by facilitating an engagement mapping exercise using the framework below. Sustainable finance professionals can work with their firm's client relationship managers, regulatory affairs staff, and/or sector desks to fill out this template using the following 5-step process:

- Define your outcome(s): Translate top-down, strategic guidance into realistic, measurable outcomes that align necessary internal stakeholders towards a common goal. Narrow or broaden the scope of your outcome as appropriate.
- 2. For each relevant level (i.e., client, sector, and policy) **going from right-to-left**, **work backwards from the desired outcome** to fill out the most important Actors, Contexts, Levers, and Bank Divisions needed to achieve that outcome.
- 3. Then, fill out the key performance indicators (KPIs) for each relevant level.
 Measuring inputs may be easier than measuring outcomes, where the degree to which engagement directly leads to impacts could be difficult to determine.
- 4. **Prioritize** engagement activities across client, sector, and policy levels based on the highest potential impact.
- 5. **Reflect** on whether the engagement map has **excluded any essential actors**, contexts, levers, and/or bank divisions.

Multi-level engagement means coordinating client, sector, and policy engagement to achieve specific climate-aligned outcomes.

Engagement activities at each level should, when assessed at a firm level, add up to more than the sum of their parts.

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Sample Engagement Map



KPI (What in/outputs should we measure?)				ARANA ENERGY TRANSFORMED
Outcome (What should engagement achieve?)				
Actor Actor (Who to engage with?)				
Context (Where and when to engage?)				
Lever (What specific action?)				
Bank Division (Which team should lead?)				
Level	Client	Policy	Sector	Center © Climate Aligned Finance