

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

Sustainable finance practitioners can use this “Engagement Map” framework to set multi-level, 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:

1. **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.

Sample Engagement Map

Level	Bank Division	Lever	Context	Actor	Outcome	KPI
Client	Senior relationship banker	Encourage client to commit to SBTi	Upcoming bilateral quarterly review calls	C-suite at clients	Top 10 US-listed agriculture clients agree to set science-based targets & publish net-zero transition plans in 12 months	# of review calls; # of clients that commit
Policy	Regulatory affairs; Sustainability team	Request SEC to mandate climate disclosures	Public consultations	US SEC		# of comment letters; # of follow-up engagements
Sector	Agriculture sector head; Sustainability team	Identify emissions reduction best practices in agriculture sector	Industry event; closed-door convenings; bilateral calls	Agriculture trade associations; Standard setters		Updated guidance from industry on emissions reductions options



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