

Case Study.

Financial Services Group.
United States.
Private Credit.

Custom ESG training drives responsible investing due diligence forward



Challenge

The subsidiary of a prominent, global financial services group with more than €360B in assets under management, this US-based team was in the early stages of developing a value-maximising ESG programme. They wished to begin educating investment professionals on emerging ESG trends, asset class-specific applications and materiality across industries, as well as offer issue- and industry-specific case studies and workshops.

dss+ were asked to develop and deliver custom content to establish foundational knowledge and applied understanding of best practices and begin implementing and scaling the ESG objectives.

dss+ Approach

An in-depth review of policies and tools informed a guided process for identifying potential improvements. Possibilities were demonstrated in real time, using actual tools and processes to address the real-world challenges of each investment team.

dss+ worked with the client to codevelop a tailored training session for seven investment teams, with the goals of advancing their understanding of ESG issues and enhancing capabilities around ESG-led due diligence.

Content included:

- ESG Fundamentals
- Navigating Grey Areas and Data Gaps
- Financial, Dynamic and Double Materiality
- Risk Exposure vs. Risk Management

To maximise engagement across a large audience that encompassed multiple teams and investment strategies, we incorporated polls and live demonstrations of resources and tools.



Assignment

Engaging, customised investment team ESG training across asset classes and investment strategies.



Offering

ESG training.



Impact

More than 150+ investment professionals participated in two virtual training sessions featuring live demos of due diligence screening and scoring tools.

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