

April 2009

The ROI of Sustainability: Making the Business Case

Aberdeen data indicate that far from being a philanthropic 'nice to have,' top performing organizations view sustainability as a 'must have' strategy for long-term, business viability and success. For 59% of respondents to the March 2009 study, *Sustainability Matters: The Corporate Executives Strategic Agenda*, sustainability does or will soon guide major parts or the entirety of their corporate strategy. In fact, surveys and qualitative interviews with top performers demonstrate that the Best-in-Class excel at matching potentially hard to grasp concepts like 'environmental and social stewardship' to clear, actionable, and measurable improvements to their bottom lines, operational efficiencies, customer and trading partner relationships, environmental impacts, and brand value. Table I illustrates the performance of respondents by maturity class across six operational cost categories. Best-in-Class results are clear: sustainability delivers powerful business benefits – especially important during recessionary times.

Table I: Year-over-year Change in 6 Key Cost Metrics

Metric	Best-in-Class	Average	Laggard
Paper costs	Decreased 11%	Decreased 7%	Increased 13%
Facilities costs	Decreased 10%	Decreased 1%	Increased 15%
Energy costs	Decreased 9%	Decreased 2%	Increased 19%
Waste / disposal costs	Decreased 8%	Remained same	Increased 7%
Packaging costs	Decreased 7%	Decreased 1%	Increased 1%
Transport / logistics costs	Decreased 5%	Decreased 2%	Increased 12%

Source: Aberdeen Group, February 2009

Aberdeen data further indicate that for a growing number of companies, positive social and environmental performance is inextricably tied to their vision of long-term viability and success (Figure 1 below). Top performing organizations are more holistic and quantitative in focus and demonstrate a more strategic approach to their initiatives. Further, the Best-in-Class focus on measuring so that they can manage, collaborating and communicating, and adjusting and reinvesting in improvements as needs and solutions develop. Without this type of visibility and proactive management, sustainability could, for the majority of companies, remain narrowly understood and not well implemented, resulting in companies leaving a good deal of money, opportunity, and innovation on the table. This report will investigate the business case for, ROI of, and best practices related to

Research Preview

A Research Preview provides an advanced look at an upcoming study and the research hypothesis which will be explored based on prior research

How to Participate in the Study

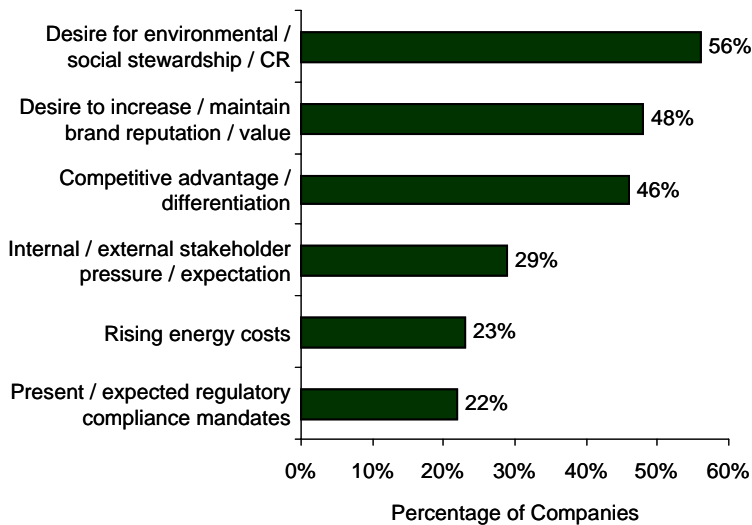
If you are an upper-management actor with oversight and responsibility for organization-wide:

- √ Sustainability
- √ Corporate Responsibility
- √ Green initiatives
- √ Environmental Performance
- √ Corporate Strategy
- √ Procurement or Supply Chain
- √ IT
- √ Public / Government Relations
- √ Governance
- √ Risk / Compliance Management

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quantifying the benefits of responsibility-driven corporate strategy and initiatives.

Figure 1: Top Pressures Driving the Sustainability Agenda

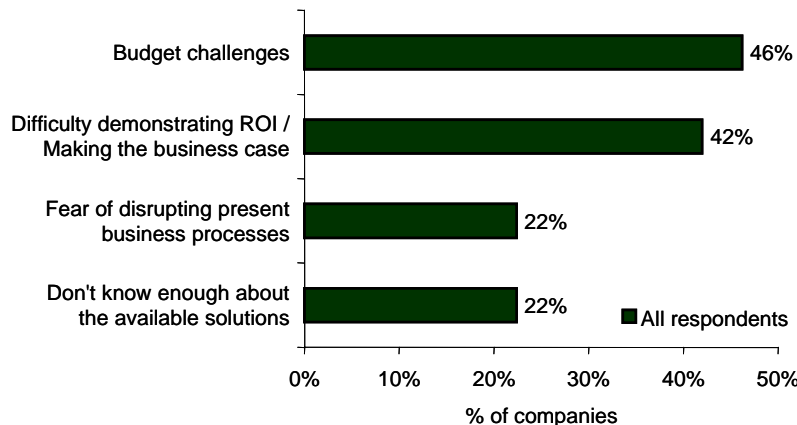


Source: Aberdeen Group, February 2009

Context

The emergence of responsibility-framed strategies for business sustainability underscores the increasing importance of social and environmental stewardship to shareholders, customers, trading partners, and regulators alike. However, for too many companies sustainability is a focus for the benefits it delivers according to metrics that are not measured at all, unevenly measured, or not communicated. Since January 2008, Aberdeen has benchmarked the sustainability initiatives of over 6,300 organizations worldwide (see "Related Research" at the end of this document).

Figure 2: Top Challenges to the Full Implementation or Success of Sustainability Initiatives



Source: Aberdeen Group, February 2009

Glossary of Key Terms

Sustainability brings together social, environmental, and economic goals with the intention of ensuring that the needs of the present are met without compromising the ability to meet the needs of the future. The long-term viability and prosperity of the business ecosystem depend on the long-term viability and prosperity of the social and environmental ecosystems.

Corporate Responsibility (CR) posits that firms have a responsibility to be social and environmental stewards and that having a positive impact on society and the planet is as important as profit.

Triple Bottom Line (TBL) determines that a business has positive impacts on the three P's (people, profit, and planet) and is a standard framework for CR agendas.

Millennium Development Goals (MDGs) are eight goals agreed upon by every country in the world and leading development institutions that form a blueprint to combat global poverty. Many companies have aligned their TBL strategies to address one or more of the [MDGs](#).

Green refers to practices, processes, and products that have a minimal impact on the health of the environmental ecosystem. The emphasis is on non-hazardous, recyclable, reusable, and energy efficient products and processes.

While Best-in-Class performers achieve impressive results – from cost reductions and improved efficiencies to new customer acquisition – companies still cite the difficulty of demonstrating ROI as the number two challenge to the full implementation or success of their initiatives (Figure 2).

So, while the quantified cost and client outcomes tell one story about the impact of sustainability on the business, there persists an idea that sustainability outcomes are 'soft,' 'intangible,' or somehow at odds with being profitable. This may be true at first glance, as popularly held rationales for sustainability are often linked to the idea that companies should focus on sustainability in order to generously 'do good.' Yet, Aberdeen research has repeatedly shown that well-implemented and managed sustainability strategy strengthens a business ecosystem on multiple and concretely demonstrable levels. (As examples, see [Going, Going, Green: Planning for The Green IT Ecosystem](#) [January 2009] and [Sustainability Matters: The Corporate Executives Strategic Agenda](#) [March 2009].) The data show that the difficulty in demonstrating the ROI of sustainability is often more a matter of inefficiency and inactivity around tracking, measuring and communicating sustainability progress, successes, and challenges. The practices that encompass both qualitative and quantitative analysis and engagement create a competitive advantage for the Best-in-Class.

Primary objectives

From the end user's perspective, the key benefits include the opportunity to:

- Optimize operational efficiency and performance
- Enhance brand value
- Decrease environmental impacts
- Increase customer loyalty
- Cost avoidance and reductions
- Gain visibility and control of organization-wide performance

Aberdeen's Hypothesis

Our research will show that to achieve a high degree of operational efficiency and customer loyalty, companies must blend a combination of strategic actions and new technologies to:

- Increase visibility and analytic capacity
- Improve communication and collaboration
- Uncover areas of opportunity
- Gain social and environmental stewardship

"We focus on reducing expenses and costs of energy, transportation and logistics. Ethical sourcing will help to select better and more efficient suppliers. Green offices and stores will increase productivity, and create awareness and loyalty amongst customers besides reducing costs. Product safety will lead to better quality products. Organic cotton will help redesign a more efficient supply chain, with lower return to vendor and higher customer value. Energy efficiency (light solutions and air conditioning) will create better, more attractive and productive environments. Focus on employee engagement will retain and attract better and high performing professionals, with a strong bond to the company."

~Chief Sustainability Officer,
Large Latin American Apparel
Company

Table 2: The Best-in-Class PACE Framework

Pressures	Actions	Capabilities	Enablers
<ul style="list-style-type: none"> ▪ Corporate Responsibility / Stewardship goals ▪ Need for competitive advantage / differentiation 	<ul style="list-style-type: none"> ▪ Implement organization-wide sustainability / responsibility vision and performance standards ▪ Adopt sustainable / responsible procurement, sourcing, supply chain, and / or supplier management strategy ▪ Implement travel reduction policies (i.e. tele-work, business travel, meetings, etc.) 	<ul style="list-style-type: none"> ▪ Holistic, lifecycle approach to products, services, and operational activities ▪ Real-time visibility into sustainability / CR-related processes and performance ▪ Comprehensive sustainability / CR-related performance targets for stakeholders / trading partners ▪ Automated or streamlined sustainability reporting 	<ul style="list-style-type: none"> ▪ Sustainability or CR-focused performance tracking / business analytics / intelligence (BI) solution ▪ Energy management solution / strategy ▪ Sustainability or CR-focused environmental management software (carbon, water, etc.) ▪ Recycling / reuse / repurpose strategies (waste, assets, packaging, etc.) ▪ Digital documents / paperless solutions ▪ Telepresence / virtual meeting / collaboration platforms ▪ Facility management software or services

Source: Aberdeen Group, April 2009

The performance metrics which will be used to determine Best-in-Class companies include:

- **Energy costs**, measured as a change in average energy costs, over the past year
- **Carbon footprint**, measured as a change in average waste / disposal costs, over the past year
- **Paper costs**, measured as a change in average paper costs, over the past year
- **Facilities costs**, measured as a change in average facilities costs, over the past year
- **Transport / logistics costs**, measured as a change in average transport / logistics costs, over the past year
- **Customer retention**, measured as a change in rate of customer retention, over the past year

Other metrics to be considered in this study:

- Customer acquisition
- Customer satisfaction
- Waste / disposal cost reduction

"Our goal is to improve the company's overall use of resources, resulting in lower cost of product and distribution to improve competitiveness. A side benefit is environmental stewardship which will be used in the sales and marketing process. Standard practices will be challenged, and revised thru input from a large group of employees. The ideas foster innovative solutions to improvements to the corporation as a whole. This all clearly ties to acceptance within the local community, the government, and attracts new customers."

~ Vice President, Large North American Chemical Company

Case in Point - Dow Chemical Company

The Dow Chemical Company is a global leader in agricultural products, chemicals, and plastics. Operating in over 175 countries, Dow has 46,000

employees and annual revenue of over \$48 billion. Dow's acclaimed corporate responsibility and sustainability platform holistically connects the needs of society and the environment with the needs of the business and demonstrate Dow's commitment to the principles of [Responsible Care](#), a voluntary, global framework that promotes safe, sustainable and profitable goals and actions within the chemical industry.

Dow's sustainability platform is as broad as it is robust and involves commitments to building relationships in the communities within which it operates, reducing overall environmental impacts, innovating for improved product stewardship, and working aggressively to meet global challenges related to climate change, energy and water, and the Millennium Development Goals. Dow has articulated an array of sustainability goals, to be achieved by 2015. They revolve around the three themes of:

- [Collaborate](#). Dow has established a series of aggressive goals to ensure environmental and community health, safety, and success that include such things as community development projects and a 75% improvement in key EHS performance indicators. By working closely with local stakeholders, Dow has set out a clearly defined and tracked roadmap to achieve enhanced relations, performance, and partnerships that improve overall community quality of life.
- [Innovate](#). Dow takes a holistic, life-cycle, and cradle-to-cradle approach to product stewardship that will, by 2015, put into place public disclosure and transparency processes on comprehensive safety assessments and product risk characterizations of all of its products, globally. Further, Dow's goals and actions focus on creating solutions and breakthroughs to meet global challenges with sustainable chemistry.
- [Elevate](#). Dow has contributed solutions geared to meet global energy and climate change challenges since 1990 and has taken on a series of goals that include: a 25% reduction in energy intensity from 2005 to 2015, initiatives to slow, stop, and reverse global warming, advocacy for policy, and thought leadership around the adoption of sustainable practices.

Dow's strategic goals for superior business sustainability and corporate responsibility were challenged by a lack of a unified, integrated platform to easily track, analyze, and report on their enterprise-wide, EHS performance across their 200 facilities in the United States. They had multiple and redundant legacy reporting systems hindered by inefficient interoperability and a lack of standardized best practices across its many facilities. In 2004, the Dow Environmental Reporting Project was chartered to find and deliver a powerful, multi-media tracking and reporting solution for 200 facilities across the United States. Dow implemented an integrated software solution that incorporates tracking, analysis, and reporting on air, waste, water, and chemical inventory performance and that further allowed them to:

- Enable the interoperability of existing enterprise systems across the corporation

- Develop and standardized best practices with a powerful, unified reporting system across its large U.S. facilities
- Replace the numerous legacy reporting systems

With the full engagement of stakeholders and leadership, a team of experts were assembled to direct the due diligence review, design, and implementation of the solution. The software solution allowed them to automate data capture, have interoperability, and streamline processes with templates, ad hoc query tools, uploaders, and interfaces. The system allowed them to have a centralized support structure that users could engage by role and responsibility across all U.S. sites which eliminated the need for redundant systems, support roles, and structural costs. To support the process changes, the team developed an impressive training and education initiative that included videos and training documentation for Dow's intranet.

Additionally, 30 classes were held and over 600 new software users were quickly trained. By 2007, Dow celebrated the success of its landmark Environmental Reporting Project, the largest emissions management program of its kind. The new platform was delivered on time and on budget and now ensures efficiency and accuracy within a unified framework and reporting structure and with a centralized, web-accessed interface for all of its work procedures, processes, and trainings, across its large U.S. facilities. In addition to enabling consistent performance tracking, analysis, and communication of its sustainability goals related to its EHS performance, Dow also achieved the following results:

- Elimination of over **\$2 Million** in redundant legacy reporting systems
- Preservation of Dow license to operate in 200 facilities at 35 manufacturing sites
- Enhanced sustainability of its business through a common work process and interoperability with existing corporate systems
- Improved data quality and availability for business decision making, analysis, and reporting

Methodology of this Research

As Aberdeen's research is 'fact-based' and continually market-facing, the Sustainability and Corporate Responsibility research practice engages executives across various industries with both surveys and qualitative interviews. Key operational and financial metrics are used to determine the maturity framework, which is comprised of Best-in-Class, Average and Laggard organizations. Market pressures that these organizations are facing, the strategic actions they take in response to those pressures, their established capabilities and the technology enablers that they employ as solutions are compared and contrasted across the maturity framework. Additional relevant facts and trends are recorded, analyzed and included in the research that is produced through this holistic methodology.

For this research survey, organizations with experience in sustainability and Corporate Responsibility initiatives will provide insights into practices and technology adopted in support of their operations as well as social and environmental performance.

Case in Point - Staples

Staples is an international retailer of office products operating in 23 countries and with revenue of just under \$20 billion USD, per annum. With an increasingly robust corporate contract business, the company expects corporate contract revenue to outpace the revenue derived from over 1,400 stores within two to three years. As the business grows, the company is faced with an increasingly complex global supply chain, skyrocketing costs on energy and transport, depleted stocks of raw materials, increased competition for resources, and consumer demand for more corporate transparency and responsibility.

With a focus on market-driven solutions for its global value chain, Staples has invested heavily in sustainability initiatives that focus on a wide variety of areas that leverage sustainability-oriented resources, assets, energy systems, facilities, software, sourcing and supplier management, and customer-centric programs including:

- Environmentally preferable products
- Product end-of-life reclamation programs
- Recycling and reuse initiatives
- Green / responsible sourcing and procurement
- Alternative and efficient energy
- Sustainable facilities design, construction, and management
- Sustainable assets including fleet vehicles
- Tracking software to support carbon tracking and green supplier management

Additionally, Staples has instituted an intensive supplier code of conduct, a business ethics platform that emphasizes transparency around social, environmental, and working conditions, diversity initiatives for employees and suppliers, environmental stewardship programs that focus on forest ethics, and philanthropy. The company has also focused on creative and collaborative ways to get all 76,000 of their associates to consider and communicate about their role in impacting the environment and society via an initiative called Staples Soul. This wide-ranging, portfolio approach exemplifies the company's desire to leverage its market position to change global trends around commodities, energy use, and social engagement. As a result Staples has focused on sustainability operationally and collaboratively with trading partners, cross-industry peers, and customers.

In 2002, Staples began to focus on replacing existing products with products that were produced using 30% or more of post-consumer recycled content

"Sustainability initiatives reduce our costs and strengthen our company and brand image. Sustainability initiatives enable us to develop new products that better meet customer and societal needs and desires. Younger employees hold strong environmental values and are attracted to companies that share these values. Our sustainability strategy focuses on the Triple Bottom Line – so we have integrated our business sustainability goals with social and environmental stewardship goals. This has resonated tremendously with customers and our employees, as well."

~Chief Sustainability Officer,
Large European Food and
Beverage Company

with a goal of increasing that to 50% or more by 2010. Staples has innovated by producing paper composed of 50% regenerated cotton from reclaimed denim, using LEED (*Leadership in Energy and Environmental Design*) certified recycled steel for office cubicles, using paper composed of 80% sugar cane waste, and by phasing out PVC in all products to avoid the plastic ending up in incinerators. Further, Staples has reduced its energy use by 15% per square foot across the company while deriving 20% of total power use from green sources. The company has 5 LEED certified buildings open or under construction and has completed 13 solar energy projects using over three megawatts of solar power with plans to install solar and daylight harvesting technology in another 150+ locations. All of this was implemented with **zero capital**.

Additionally, Staples has four wind power projects under development, has invested in a fuel cell project designed to run a 300,000 ft² facility 85% off the grid, and has adopted diesel / electric hybrid trucks that are programmed with speed caps of 60mph, thereby saving 540,000 gallons of diesel in 2007 alone and resulting in significant reductions in Green House Gas emissions. Lastly, Staples has installed software that allows the company to track the purchase records of corporate customers, enabling the production of environmental reports that show how much paper was purchased using what amount of recycled content and by what amount the more sustainable purchase reduced GHG emissions.

Staples made a decision to embed sustainability within the core business strategy of the enterprise. According to Mark Buckley, the VP of Environmental Affairs, this holistic approach demonstrates a focus on:

- Business opportunity versus risk
- Resource management versus waste management
- Lifecycle accounting versus ROI
- Quality versus compliance
- Supply Chain impacts versus operational impacts

This approach has led to the realization of a highly successful Triple Bottom Line: great benefits for people, profit, and planet.

Solution Snapshot

Solutions can range from specialized software that allows for the tracking and management of sustainability and corporate responsibility performance, the selection of responsible suppliers and materials, energy and asset management, traceability solutions, data integration, analysis, EHS and compliance, and collaboration platforms. Table 2 presents just a partial listing of relevant providers.

“We are trying to incorporate sustainable business strategies into our core business and product planning. We believe that, in addition to it being the right thing to do, it is also just good, smart business – and is the way successful business will compete and survive with energy and raw material costs rising. Sustainable business reduces costs, improves efficiency, reduces waste, and improves profitability. The challenges continue to be to make this a core component of our business culture and not an initiative that is on the periphery. We are taking a broad view of these initiatives’ investment by working with solar energy providers to establish a 20-year purchase plan that has a rollover provision in the case of a facility change and have focused on four key areas: environmentally preferable product development, waste reduction and recycling, energy, and climate and environmental education.”

~ Mark Buckley, VP,
Environmental Affairs, Staples

Table 2: Sustainability & Corporate Responsibility-related (CR) Technology & Service Providers

Company	Sustainability / CR / Solutions or Assets	Energy / Emissions / Green IT	BI / Performance Management	Supplier / Supply Chain Solutions	Reporting / Assessment	Document / Data Management / Analytics	Stakeholder Management / Collaboration	Consulting / Education	GRC / EHS
2Future (Proventia)	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Accenture					<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	
Actuate	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Aravo	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
Arup					<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	
Atos Origin					<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
Blue Skye					<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	
BSI					<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	
Capgemini					<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	
Carbon Networks		<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Carbon Solutions America		<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
CH2MHill		<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Cintellate	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Cisco		<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Claromentis	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Cleanmetrics		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
Clear Standards	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
CSRWare		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
Deloitte		<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Domani		<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
EcoVadis	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Enablon	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Company	Sustainability / CR / Solutions or Assets	Energy / Emissions / Green IT	BI / Performance Management	Supplier / Supply Chain Solutions	Reporting / Assessment	Document / Data Management / Analytics	Stakeholder Management / Collaboration	Consulting / Education	GRC / EHS
Enernoc		<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	
Enverity		<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Enviance	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
ESS	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Extended CSR	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Foresite Systems	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Fujitsu		<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
Greenstone Carbon Mgmt.		<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
HP		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
IBM		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
I.H.S. / ESP	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Infor		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
Intel		<input checked="" type="checkbox"/>							
Intelix		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Llamasoft		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
Metricstream	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Microsoft Dynamics		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>						
Microstrategy			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
Natural Logic					<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	
Oracle	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
PE International	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Perillon		<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
PlanetMetrics		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Point Carbon		<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	

Company	Sustainability / CR / Solutions or Assets	Energy / Emissions / Green IT	BI / Performance Management	Supplier / Supply Chain Solutions	Reporting / Assessment	Document / Data Management / Analytics	Stakeholder Management / Collaboration	Consulting / Education	GRC / EHS
Polycom		<input checked="" type="checkbox"/>					<input checked="" type="checkbox"/>		
ProcessMap			<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
ProfitPoint				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
SAP	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
SAS	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Sedex	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Siemens		<input checked="" type="checkbox"/>						<input checked="" type="checkbox"/>	
Sitecontrols		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
Stakeware	<input checked="" type="checkbox"/>						<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Streamserve		<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>			
SustainAbility					<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	
Sustainability Partners					<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	
Symantec		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
Systar	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Tandberg		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>		
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TerraLocke					<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	
Terrapass		<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
YRG					<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	

Source: Aberdeen Group, April 2009

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