



Empowering Responsible Investing: A Guide to Maximising Stewardship Technology ROI

Empower your team, enhance your impact, and stay ahead in the evolving landscape of responsible investing with this essential guide.





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Introduction: Understand Stewardship Solutions

A Stewardship Solution is more than just a technology platform—it's a comprehensive system designed to track, report, and analyse all portfolio engagements in one central location. This fosters improved collaboration, enhances transparency, and ensures compliance with global stewardship regulations. It can transform how you manage risks as well as utilise and interpret your engagement and voting data. A Stewardship Solution is one of the most valuable, game-changing innovations available today.

The primary purpose of a Stewardship Solution is straightforward: to improve your engagement tracking and reporting, enabling you to stay ahead of evolving ESG regulations. By leveraging such a solution, investors can increase operational efficiency, gain a competitive edge, and maintain robust risk management.

With a Stewardship Solution, you can record, track, and analyse all stewardship activities within a single system of record. This includes contact and company information, voting decisions, collaborative initiatives, issue outcomes, and engagement timelines. Having all data centralised provides organisations with a complete, real-time picture of engagements that can be shared and analysed by teams across the company.



Moreover, with artificial intelligence integrated into your Stewardship Solution, you can gain deeper insights and enhance regulatory reporting—all while reducing costs. For smaller firms, adopting a Stewardship Solution levels the playing field, enabling them to compete successfully with larger, more established companies.

[Learn More](#)



01

Signs You Really Need a Stewardship Solution

In the early stages of implementing your stewardship activities, maintaining a spreadsheet or jotting down notes about different engagement interactions might suffice. However, as your engagements grow, this method of record-keeping becomes not only unwieldy but can also cost you revenue and new opportunities.

Below are some indicators that can help you make this decision. Exploring the benefits of a Stewardship Solution could help your firm streamline processes, improve ESG/Sustainability performance, confidently comply with regulations and build the long-term value that today's investors demand.

Is it time to invest in a Stewardship Solution? If you've checked off three or more of these statements, start considering a Stewardship Solution.

Your teams collaborate closely, even when not physically together.

Your team is struggling to manage an increasing volume of engagements.

You find it difficult to maintain consistent and comprehensive reports.

Data is stored in multiple systems or formats and your current apps don't integrate well.

Your sustainable investments portfolio is growing quickly, and you need to scale processes fast and efficiently.

Your engagement activities lack real-time tracking and analytics.

Your team is overwhelmed with administrative tasks.

You find it costly and challenging to stay compliant with evolving ESG regulations.

You or your IT department is buried under maintenance requests.

You want to gain deeper insights from your engagement data.

You need to demonstrate stewardship impact to stakeholders.



02

Leverage Technology for Growth

A robust Stewardship Solution can be the catalyst that propels your firm forward, enabling you to manage engagements more efficiently, stay compliant with evolving regulations, and make informed decisions that enhance your competitive edge.

01

Drive Efficiency with Centralised Engagement Tracking

Managing engagements through spreadsheets or disparate systems can be time-consuming and prone to errors. A Stewardship Solution centralises all your engagement activities into a unified dashboard, allowing for unlimited tracking of both single and thematic engagements. By recording every interaction—whether it's an email, call, or meeting—and tagging topics like Environmental, Social, or Governance issues, your team gains a comprehensive view of all activities. This streamlines processes, reduces duplication of efforts, and saves valuable time that can be redirected toward strategic initiatives.

Here are several ways a Stewardship Solution can help your investments grow at scale:





02

Enhance Risk Management through Data Visualisation and Analytics

Effective risk management relies on real-time insights and the ability to analyse data swiftly. A Stewardship Solution provides advanced data visualisation tools and aggregation capabilities. With customisable dashboards, you can filter and segment data at the holding, fund, issue, or company level to gain actionable insights. This empowers your team to make data-driven decisions, identify areas for improvement, and measure the impact of engagements. Additionally, automatic mapping to frameworks like the Sustainable Development Goals (SDGs) and Global Reporting Initiative (GRI) taxonomy ensures alignment with global standards.

03

Build Trust with Advanced Reporting Features

Transparent reporting is crucial for building trust with stakeholders and meeting regulatory requirements. Manual reporting can be tedious and error-prone. A Stewardship Solution automates and customises reporting, making it easier to comply with regulations such as the Sustainable Finance Disclosure Regulation (SFDR), GRI standards, and the UK Stewardship Code. Enhanced visual reports can be exported in multiple formats (PDF, Excel, CSV, JPG), allowing for seamless communication of your activities and impact. This not only saves time but also enhances credibility with investors, regulators, and other stakeholders.



04

All-in-One System: Integrations

Integrating your Stewardship Solution with other tools enhances efficiency and ensures all data resides in one place.

Common integrations include:

- Email and Calendar Systems (e.g., Outlook): Sync engagements and appointments to avoid double-bookings and missed meetings.
- News Feeds (e.g., Google News): Stay updated on recent ESG news related to your portfolio companies.
- Third-Party Data Providers (e.g., Sustainalytics, FactSet, MSCI): Access enriched data for deeper insights and more informed decision-making.

By consolidating these tools, your team reduces administrative burdens and can focus more on impactful engagement activities.

05

Augment Accountability: Join up Engagement and Voting Data

Linking your engagement activities with voting records enhances transparency and accountability.

- A Stewardship Solution allows you to: Add Individual Votes or Bulk Upload Voting Data: Easily integrate voting decisions into your central system.
- Link Votes with Engagements: Demonstrate how your voting aligns with your engagement strategies and ESG objectives.
- Log Rationales and Report on Exceptions: Provide context for voting decisions, enhancing understanding among stakeholders.

This integrated approach ensures that all stewardship activities are aligned and easily reportable.



06

Gain Comprehensive Insights: Issue Outcomes and Timelines

Understanding the full trajectory of your engagements is vital for assessing impact and planning future actions. Features that support this include:

- **Engagement Timelines:** Review historical engagements and scheduled meetings, facilitating better collaboration and continuity.
- **Issue Outcomes:** Seamlessly add and report on the outcomes of issues when they are closed, and reopen them if necessary for continued tracking.

By evaluating issue outcomes, you can determine the effectiveness of your engagements, refine strategies, and showcase impact to stakeholders.

Benefits of using the Maanch Engagement Tracker





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Embracing technology can position your firm for sustained growth and success in the competitive landscape of responsible investing.

Darshita Gillies, Founder & CEO Maanch

By leveraging technology through a comprehensive Stewardship Solution, your firm can:

- **Scale Efficiently:** Manage a growing number of engagements without proportional increases in workload.
- **Enhance Decision-Making:** Utilise real-time data and analytics to make informed choices.
- **Stay Compliant:** Keep up with evolving ESG regulations effortlessly.
- **Build Stronger Stakeholder Relationships:** Improve transparency and communication with investors, regulators, and portfolio companies.



03

How to Craft a Stewardship Solution Strategy

Implementing a successful Stewardship Solution involves more than just selecting the right technology; it requires a well-crafted strategy that aligns with your business objectives and engages your entire team.

Here are five actionable steps to build a winning stewardship solution implementation strategy:

01

Define Your Vision and Strategy

Successful firms understand the importance of having a clear, actionable vision that inspires and guides their team. This vision might be becoming the market leader in stewardship or redefining responsible investing in your industry. Ensure your vision is both aspirational enough to motivate and specific enough for the entire organisation to understand and work towards. Alongside your vision, develop a strategic plan outlining how you intend to achieve your goals, incorporating timelines, resources, and key milestones.



02

Clarify Your Stewardship Objectives

Use this opportunity to redefine your objectives by:

- **Aligning with Strategic Priorities:** Ensure your responsible investing goals support broader organisational aims like risk management, competitive differentiation, and long-term value creation.
- **Incorporating Innovation:** Embrace technologies that offer deeper insights and predictive analytics to stay ahead of industry trends and regulatory changes.
- **Enhancing Stakeholder Engagement:** Improve transparency and communication by providing detailed insights into your ESG activities and their impact.

This strategic approach allows you to optimise workflows, eliminate redundancies, and set measurable targets for success, ultimately advancing your organisation's mission in responsible investing.

**03**

Secure Executive Sponsorship and Team Buy-In

Gaining support from top management is crucial for the successful rollout of your Stewardship Solution. Executive sponsorship ensures that the initiative has the necessary resources and aligns with organisational priorities. Communicate the benefits of the Stewardship Solution to all stakeholders, emphasising how it will enhance efficiency, compliance, and competitive advantage. Engage team members early in the process to build enthusiasm, address concerns, and foster a culture that embraces change and innovation.

04

Identify Key Success Metrics

As the saying goes, “You can’t manage what you can’t measure.” Establish clear metrics to monitor the performance of your stewardship activities. These metrics should be visible and accessible to everyone involved, from analysts to the executive team. Utilise dashboards and reporting tools within your Stewardship Solution to track progress in real-time. Metrics may include:

- Number of engagements initiated and completed
- Issue resolution rates
- Compliance with regulatory reporting requirements
- Time saved through process automation



05

Develop, Monitor, and Optimise Your Implementation Plan

Creating a comprehensive implementation plan is essential for the successful adoption of your Stewardship Solution. Begin by developing a detailed roadmap that outlines each step required to integrate the solution into your operations effectively. This plan should include:

- **Timelines:** Set realistic deadlines for each phase of the implementation to maintain momentum without overwhelming your team.
- **Assigned Responsibilities:** Clearly define who is responsible for each task to ensure accountability and streamline collaboration.
- **Resource Allocation:** Determine the budget, personnel, and tools needed to support the implementation process efficiently.
- **Risk Management Strategies:** Anticipate potential challenges and devise strategies to address them proactively.

Consider engaging with your solution provider for additional support during this phase. For instance, at Maanch, we offer an onboarding checklist, guided demos and multiple training sessions as part of our onboarding process and continuously release new enhancements and features customisable to your needs.

Once your Stewardship Solution is in place, continuous monitoring and optimisation are crucial. Regularly solicit user feedback to identify challenges and areas for improvement. Review and align objectives periodically to ensure they remain consistent with your evolving business goals and the changing regulatory landscape. Be prepared to optimise for effectiveness by making necessary adjustments—this might involve refining processes, updating training, or leveraging new features of your solution.

“An integrated approach maximises the return on your investment and enhances your ability to navigate the complexities of responsible investing.”



Finding the Right Stewardship Solution

Selecting the appropriate Stewardship Solution is a pivotal decision that can significantly influence your firm's efficiency, compliance, and overall success in responsible investing. Comparing systems can be overwhelming with myriad features to consider and plenty of platform options.

This chapter provides a structured approach to help you navigate the options and choose a solution that aligns perfectly with your firm's needs and objectives.

Key Considerations When Selecting a Stewardship Solution. When evaluating different Stewardship Solutions, consider the following essential features and factors:

Scalability

What to Consider:

- Is the system capable of growing with your firm?
- Can it handle an increasing number of users, data volume, and complexity of engagements?
- Will it require costly replacements or upgrades in the future?

Maanch ET Capability:

Designed to scale with your business, accommodating from small teams to large organisations. Handles unlimited engagement tracking without compromising performance.



Customisation

What to Consider:

- Does the solution allow you to tailor features to your specific needs?
- Can you create custom fields, reports, and workflows?
- Will it adapt to your existing processes and/or help you further optimise your process?

Maanch ET Capability:

Provides extensive customisation options, including custom labels, tags, and reporting metrics. Allows you to tailor dashboards and data views to match your workflows. Additional bespoke customisation to meet unique requirements also available. performance.

Integration Capabilities

What to Consider:

- Can the solution integrate seamlessly with your existing tools and systems?
- Does it support integration with email clients, calendars, data providers, and other essential applications?
- Will integration reduce manual data entry and improve efficiency?

Maanch ET Capability:

Supports integrations with Outlook Email and Calendar for streamlined communication and scheduling. Includes Google News integration to access recent ESG news about portfolio companies. Offers integration with third-party data providers like Sustainalytics, FactSet, CDP, MSCI etc. Provides data migration support during onboarding to consolidate historical data into one platform.



User Experience and Training

What to Consider:

- Is the platform user-friendly and intuitive?
- What training and onboarding support does the provider offer?
- Will your team be able to adopt the solution quickly and effectively?

Maanch ET Capability:

Features a clean, intuitive interface designed for ease of use. Offers extensive training sessions as part of the onboarding process. Provides direct access to our product team for ongoing support and clarification. Includes a comprehensive User Guide to assist with platform navigation and feature utilisation.

Security and Compliance

What to Consider:

- Does the solution adhere to industry-standard security protocols?
- Is it compliant with relevant regulations like GDPR?
- Does it offer features like data encryption, secure access controls, and regular security audits?

Maanch ET Capability:

Prioritises data security with robust encryption and secure access controls. Complies with global regulations, including GDPR, to protect sensitive information. Implements two-factor authentication and customisable user permissions. Conducts regular security audits to ensure ongoing protection and compliance. Cyber Essentials Plus certified.



Artificial Intelligence (AI) and Advanced Analytics

What to Consider:

- Does the platform leverage AI to enhance functionality?
- Will analytics capabilities help you stay ahead of industry trends and regulations?

Maanch ET Capability:

Integrates AI features like automated topic suggestions based on issue descriptions. Uses AI to map engagements to relevant frameworks like GRI and SFDR automatically. Enhances reporting and decision-making processes through advanced analytics. Continuously explores new enhancements aligned with client needs and market trends.

Pricing and Total Cost of Ownership

What to Consider:

- Is the pricing structure transparent and aligned with your budget?
- Does the solution offer good value in terms of features and long-term scalability?

Maanch ET Capability:

Offers clear and competitive pricing packages suitable for firms of various sizes. Includes essential features in the base price without hidden fees. Provides options to upgrade packages as your firm grows and needs evolve.



Customer Support and Service Level Agreements (SLA)

What to Consider:

- What level of customer support does the provider offer?
- Does the provider have clear SLAs regarding response times and issue resolution?

Maanch ET Capability:

Provides dedicated customer support with direct access to our product team. Offers support through email, and virtual meetings to address queries promptly. Commits to timely responses and proactive communication regarding platform updates. Includes comprehensive onboarding and ongoing assistance without extra charges.

Implementation and Maintenance

What to Consider:

- How complex is the implementation process?
- Does the provider assist with data migration and system setup?
- What are the ongoing maintenance requirements and associated costs?

Maanch ET Capability:

Ensures a smooth and rapid implementation. Assists with historical data migration during the onboarding process. Handles all maintenance, updates, and system enhancements without disrupting your operations. Eliminates the need for internal IT resources dedicated to platform upkeep.



Vendor Reputation and Track Record

What to Consider:

- Does the provider have a proven track record in the industry?
- Is the vendor recognised for innovation and reliability in stewardship technology?

Maanch ET Capability:

Established in 2018, Maanch has rapidly scaled with a global team of experts. Recognised by the Investment Association among 2023 Top 5 Fintech. Trusted by clients across the UK and Europe, managing assets exceeding £200 billion. Combines deep expertise in finance, technology, ESG, and sustainability.





6 Steps to Choosing the Right Stewardship Solution

To streamline your selection process, consider the following steps:

01: Identify Your Firm's Specific Needs

- **Outline Challenges:** Document current pain points in managing stewardship activities. Where does your Stewardship team struggle? What systems aren't working for you? What goals do you have trouble meeting now, and what are your future goals?
- **Define Objectives:** Clearly state what you aim to achieve with a new solution.

02: Engage Key Stakeholders

- **Gather Insights:** Involve team members who will use the platform to understand their needs. What platforms do you already use for email, data management, internal communications and other processes? Make a list so you can evaluate how well your current programs work, and make sure the Stewardship Solution you select will work for your business.
- **Ensure Alignment:** Confirm that the solution meets the collective requirements across departments.

03: Create a Shortlist of Potential Solutions

- **Research Options:** Compile a list of Stewardship Solutions based on your criteria.
- **Consider Budget:** How much can you invest in a Stewardship Solution? Compare platforms based on the number of users you have and the features that will be most useful. Consider the value of a Stewardship Solution: the features, customer service, and ease of use.



6 Steps to Choosing the Right Stewardship Solution

To streamline your selection process, consider the following steps:

04: Request Trials and Evaluate

- See It in Action: Schedule demos to experience the platforms firsthand. Utilise free trials of the shortlisted solution to assess functionality and user experience.
- Evaluate and Compare Options: Rate solutions against your key criteria. Consider input from all stakeholders in the evaluation.

05: Check References and Conduct Due Diligence

- Speak to Clients: Contact existing users to learn about their experiences.
- Verify Credentials: Review compliance certifications and industry recognitions.

06: Make an Informed Decision

- Weigh Pros and Cons: Consider both short-term benefits and long-term implications.
- Align with Goals: Choose the solution that best fits your firm's objectives and budget. Consider the value of a Stewardship Solution: the features, customer service, and ease of use.



Conclusion: Maximising Your Stewardship Solution ROI

Investing in the right Stewardship Solution is crucial for enhancing efficiency, ensuring compliance, and driving growth in responsible investing. To assist you in making an informed decision and to maximise your return on investment (ROI), we've developed a user-friendly Stewardship Tools Cost-Benefit Calculator. This tool provides a clear perspective on the pros, cons, and costs of using Excel spreadsheets, building solutions in-house, or opting for specialised software like the Maanch Engagement Tracker.

Why Use Our Stewardship Tools Cost-Benefit Calculator?

Quantify Savings

See cost reductions and efficiency gains over a period of 3-years.

Data-Driven Decisions

Get an impartial, customised report for informed choices.

Facilitate Discussions

Download and share the personalised report with your team and other stakeholders.

[Open Stewardship Calculator](#)



About Maanch

Unlock the Full Potential of Your Investments.

For asset owners and managers who demand more from their stewardship and responsible investment (RI) strategies, Maanch ET offers a transformative platform that integrates financial returns with impact-driven performance.

We understand the challenges investment teams face:

- Fragmented data, manual processes, and a growing demand for transparent ESG reporting.
- Pressure to link sustainability efforts with profitability while demonstrating clear, measurable outcomes.

At Maanch, we provide:

- AI-powered, customisable solutions that transform your RI strategy from reactive reporting into proactive, data-driven insights.
- Tailored stewardship tools that help you actively engage with stakeholders, enhance decision-making, and demonstrate long-term value.

Our proven expertise and commitment to sustainability ensure your success:

- We are a certified B-Corp.
- We are trusted by leading clients across UK & Europe managing over £200 billion in AuM.
- We are recognised as a top 5 fintech by the Investment Association.
- We help you move beyond compliance, delivering both profitability and measurable impact.
- With Maanch ET, you can streamline your processes, improve your ESG/ Sustainability performance, confidently comply with regulations and build the long-term value that today's investors demand.

Contact Us

Contact us link: <https://maanch-invest.com/contact-us/>

Additional Resource

[Navigating your Switch: Top considerations for selecting an Engagement Tracking Solution](#)



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