optera

Buyer's Guide:

Carbon Management Software

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Introduction

Choosing and buying carbon management software is a journey—and it doesn't end when the contract is signed. In fact, that's just the beginning of what will hopefully be a fruitful partnership between your team and your software vendor of choice. But to choose the right partner, first you'll have to define your needs, evaluate and compare your options, get buy-in from your internal stakeholders (many of whom will have different priorities than your own), make your choice, and negotiate the contract.

To help you navigate that process, we've put together this buyer's guide. We want to help you choose the right solution for your company's unique needs, so you can offload the manual and sometimes tedious work of carbon management, and redirect your team's time and energy where it really matters: decarbonization.

Defining your needs and comparing vendors

If you're reading this buyer's guide, it's probably safe to assume that you've decided you need carbon management software. Maybe you're a team of one who simply can't manage everything on your own, or maybe you're part of a large, complex ESG team whose file management has gotten out of hand and you need to streamline.

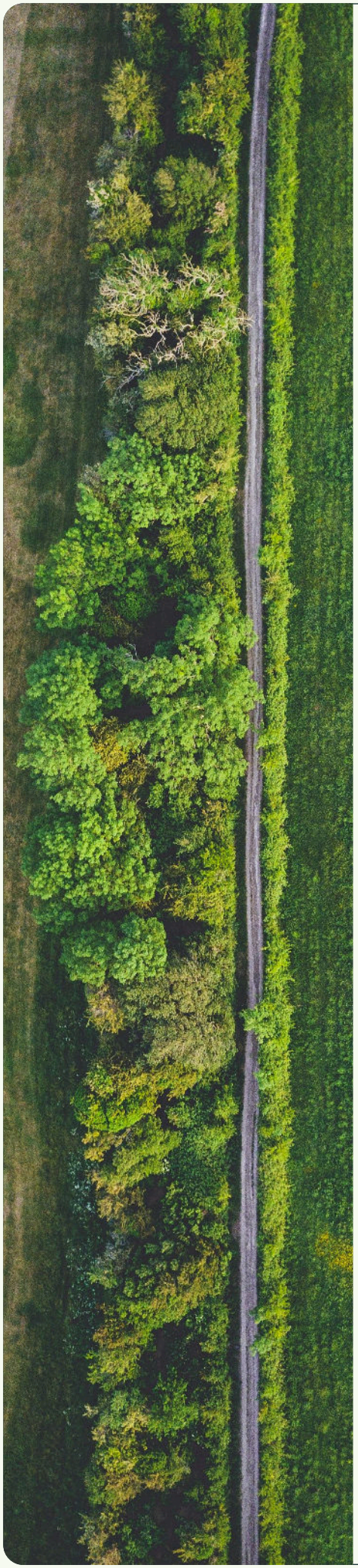
But before you venture out into the world of vendors, it's important that you have a rock-solid understanding of your company's needs. You need to map out why you're investing in carbon management software, who needs to be involved, and what each of those teams' priorities and requirements entail.

Start with your stakeholder ecosystem

Your carbon management software will touch multiple teams, each with distinct needs:

- Sustainability/ESG team
- IT/Technical team
- Finance team
- Procurement team
- Operations/facilities team
- Supply chain team
- Executive leadership

Get these stakeholders involved early. Their input shapes both your requirements and your timeline.



Know your regulatory landscape

The regulatory environment is evolving fast. Your platform needs to handle current and upcoming requirements. **Key regulations to consider:**

- → **California SB 253 and 261** mandate emissions reporting for large companies
- → **AB1305** sets specific disclosure requirements for climate-related claims
- → **CBAM** requires emissions disclosures for EU imports
- → **CSRD** introduces detailed sustainability reporting standards for companies operating in the EU

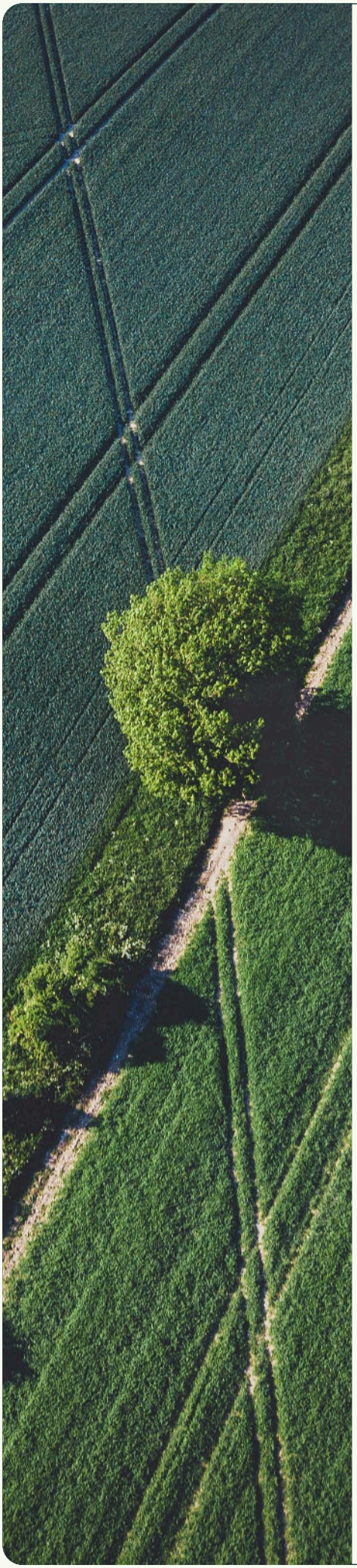
Factor in external pressure

Beyond regulations, identify which investors and stakeholders demand emissions data. Are you facing ESG rating pressures? Do customers want product-level carbon footprint data? These demands shape your reporting requirements.

Set clear goals and define technical requirements

Your carbon management goals might include:

- Meeting specific emissions reduction targets
- Improving emissions data transparency
- Managing climate-related risks
- Streamlining reporting processes



Beyond your goals, you also need to be crystal-clear on the technical requirements for your carbon management software implementation. Miss this step and you'll waste time evaluating solutions that can't actually handle your needs. This is one area where the input of your stakeholder team is absolutely essential.

Organizational coverage

First, map your company's carbon footprint structure.

You need to know:

- Which entities your system must track—including subsidiaries, facilities, and key suppliers
- Your geographic spread and how much of it needs coverage
- Total number of facilities and locations requiring monitoring

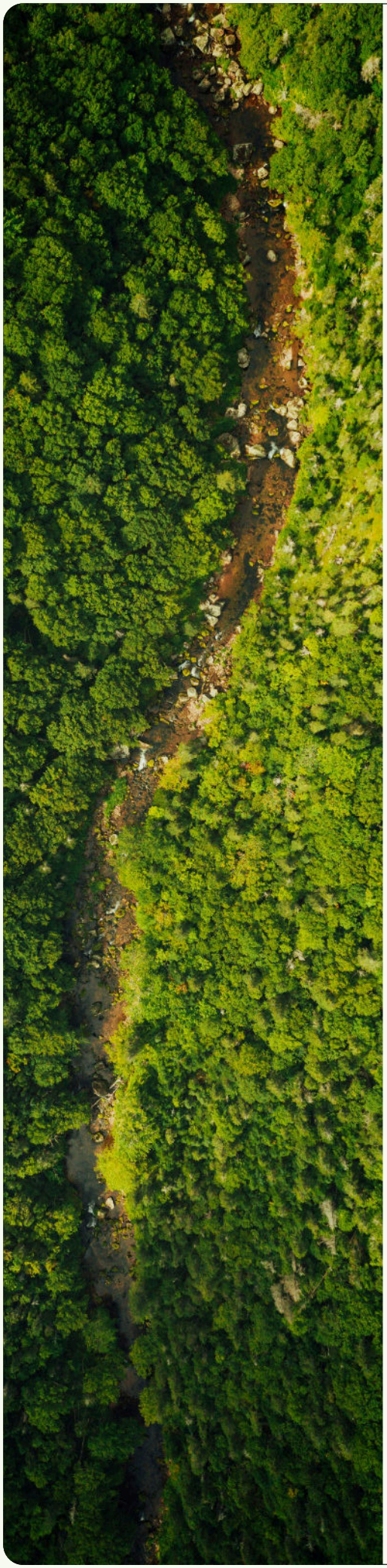
Emissions scope coverage

SCOPES 1 & 2

Start with your direct emissions.

You need to understand:

- All direct emission sources (vehicle fleets, manufacturing processes, etc.)
- Types of energy consumption requiring tracking
- Number of utility accounts to manage



Don't forget: Different regions often mean different utility providers and different regulatory reporting requirements.

SCOPE 3

Scope 3 emissions are complicated—and not a focus area for every carbon management software vendor.

Get clear on:

- Which scope 3 categories actually matter for your business
- Your approach for managing upstream supplier data
- Calculation methods needed (spend-based, supplier-specific, hybrid)
- Supplier emissions tracking requirements (company, facility, or product level)

Remember: Your emissions tracking will likely expand over time as new regulations enter into force and stakeholder demands increase. When defining your scope, build in flexibility and room for growth, so that whichever solution you choose does not become obsolete as soon as it's implemented.

Your carbon management platform should be able to easily scale to handle increasing volumes of data, new emissions sources, and expanding reporting requirements

Carbon management vendor comparison checklist

Once you've defined your goals and technical requirements, you are ready to evaluate vendors and compare how well they meet those needs. Use this checklist to evaluate and compare carbon management software vendors side-by-side. Ensure the solution aligns with your needs, supports your implementation process, and delivers ongoing value.

EVALUATION CRITERIA	VENDOR 1	VENDOR 2	VENDOR 3
Implementation support			
Does the vendor include data discovery, collection, transformation, and QA as part of the implementation process?			
Is technical platform configuration included to customize the software to your business structure and workflows?			
Does the vendor offer integration support for historical data imports and system connections?			
Does implementation support come with vendor onboarding or is a third party consultant required?			
Methodology and standards			
Are inventories developed using GHG Protocol-aligned methodologies?			
Does the vendor use the most accurate, up-to-date emissions factors and available data?			
How does your solution ensure compliance with GHG Protocol standards?			
What features support SBTi target setting and tracking?			

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EVALUATION CRITERIA	VENDOR 1	VENDOR 2	VENDOR 3
Methodology and standards (continued)			
How does the platform support PCAF requirements for financial institutions?			
What capabilities exist for ESRS reporting?			
How are framework updates managed and implemented in the system?			
Inventory management and reporting			
Does the vendor provide an Inventory Management Plan (IMP) to guide you post-implementation?			
Is the platform capable of generating robust, auditable reports for compliance and stakeholder communication?			
Consulting and advisory services			
Does the vendor offer ongoing decarbonization and sustainability consulting (e.g., assurance and verification support, regulatory advisory, project planning, or target-setting)?			
Are consulting services included in the cost, or do they require additional fees?			
Ongoing platform management			
Does the vendor include ongoing support for ad hoc technical questions, data updates, and system maintenance?			
Are updates to the platform (e.g., new features, compliance updates) included in the subscription fee?			

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EVALUATION CRITERIA	VENDOR 1	VENDOR 2	VENDOR 3
Cost and transparency			
Are there hidden fees, such as extra charges for consulting, support hours, or third-party integrations?			
Does the pricing model scale with your organization's needs?			
What is the license structure for the platform (per seat, enterprise, etc)?			
What costs are associated with implementation?			
Is implementation typically performed and billed by their team, or a third party?			
What are customer support SLAs, and what is the fee structure?			
What other fees are associated with usage of the platform?			
Scalability and future readiness			
Is the platform designed to grow with your organization (e.g., supporting multiple facilities, regions, or divisions)?			
Can it adapt to future regulatory changes or advancements in emissions tracking?			
Data input			
What data import formats are supported?			
Does the platform support bulk upload?			
Does the platform provide automated flagging for data discrepancies, gaps, and errors?			

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EVALUATION CRITERIA	VENDOR 1	VENDOR 2	VENDOR 3
Data input (continued)			
How are manual data entries validated?			
What automatic data collection capabilities are available?			
Does the platform collect/request data directly from suppliers and third parties? If so, how?			
Data output			
What standard report templates are available (CDP, CSRD, TCFD)?			
Can reports be customized for different frameworks?			
What data export capabilities exist?			
How is data quality assured and verified?			
What access does the platform provide to third-party verifiers?			
Emissions management			
What scope 3 categories does the platform support?			
Does the platform support multiple methods of supplier emissions calculation (spend-based, supplier-specific, etc.)?			
What are the platform's sources of emissions data and emissions factors?			
Are methodologies, emissions factors, and calculations transparent and auditable?			

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EVALUATION CRITERIA	VENDOR 1	VENDOR 2	VENDOR 3
Emissions management (continued)			
Does the platform support custom emissions factors?			
Does the platform provide decarbonization impact forecasts?			
How does the platform support net-zero target achievement?			
Integrations			
Does the platform support third-party data integrations?			
Through an API, or direct data feed?			
User access and functionality			
What role-based access controls are available?			
How are different user types supported?			
What training and support is provided for different user types?			
Technical requirements			
How is the platform configured? Is it customizable?			
What are the system's security features and certifications?			
How is data backed up and protected?			
What is the system's uptime guarantee?			

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EVALUATION CRITERIA	VENDOR 1	VENDOR 2	VENDOR 3
Technical requirements (continued)			
How are system updates managed?			
Does the platform support multiple languages, currencies, and units of measurement?			
Vendor experience and qualifications			
How many years of experience does the team have in building carbon management software?			
Can they provide case studies from similar organizations?			
What is the vendor's experience and client success rate with third party verification?			
Product roadmap			
What planned features are on the roadmap over the next 18 months?			
How frequent is the product release cycle?			
How does the company incorporate customer feedback and feature requests?			

The buying team: Getting cross-functional support

In “Defining needs,” we covered your stakeholder ecosystem. Remember, that includes a variety of your colleagues, each with their own priorities:

Sustainability/ESG team

Define requirements related to emissions tracking, reporting, and compliance.

Finance team

Review budget alignment, ROI, and ongoing cost implications.

Executive leadership

Ensure alignment with strategic goals and secure project buy-in.

Operations/facilities team

Provide input on data collection, processes, and scalability.

IT/Technical team

Assess technical compatibility, data integrations, and security requirements.

Procurement team

Evaluate vendor contracts, pricing models, and long-term support agreements.

Supply chain team

Assess the software’s ability to track emissions across the value chain and improve supplier engagement.

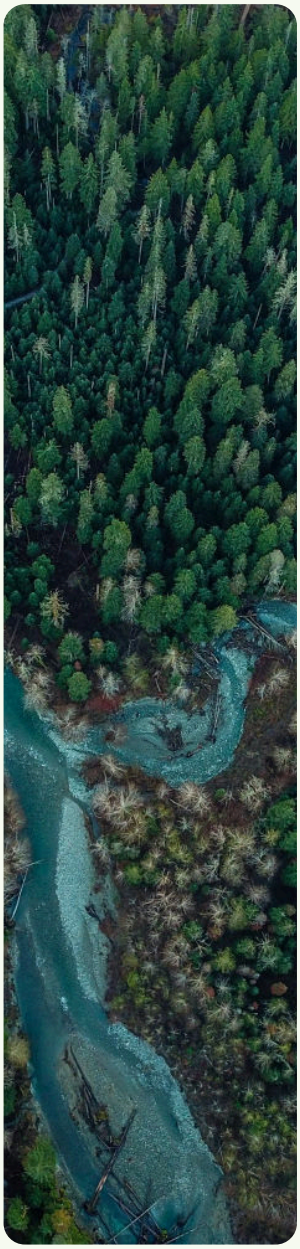
Successfully purchasing carbon management software will require buy-in from all of the above. Not only that, but gaining widespread cross-functional support means your chosen solution is more likely to be widely adopted and used to its full potential.

That said, aligning such a diverse group, sometimes with competing priorities, around the same goal is a challenge. It’s essential that each stakeholder is involved early, with clearly defined roles for everyone.

Start by gathering input on technical requirements via workshop, survey, or brainstorming sessions, and be sure to communicate the benefits of software in addressing those requirements.

Get regular meetings on the calendar for updates and feedback on vendor demos, and get clarity up front on what milestones and formal sign-offs are required by your company's procurement process

Addressing potential challenges

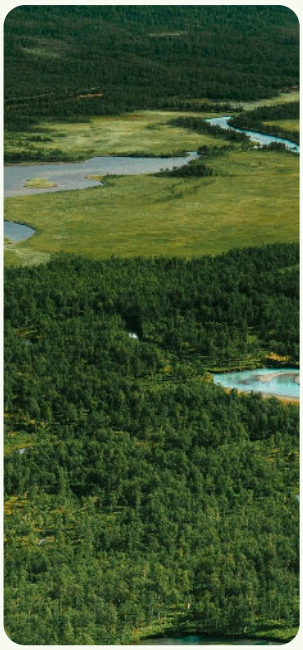


Conflicting priorities can slow decision-making, so it's critical to connect sustainability goals with broader business objectives. Budget approval is another hurdle. A strong business case can turn skeptics into champions.

Creating a strong business case for carbon management software starts with aligning the investment to key business objectives—compliance, cost savings, risk mitigation, and competitive advantage. Begin by quantifying the impact: how much time and money will automation save compared to manual processes? How does improved data accuracy reduce regulatory risk? Highlight ROI by showcasing efficiency gains, streamlined reporting, and long-term sustainability benefits. Engage finance and executive teams early, framing carbon management as a strategic enabler rather than a cost center. Finally, reinforce the case with industry benchmarks, case studies, and potential cost avoidance from regulatory fines or inefficiencies.

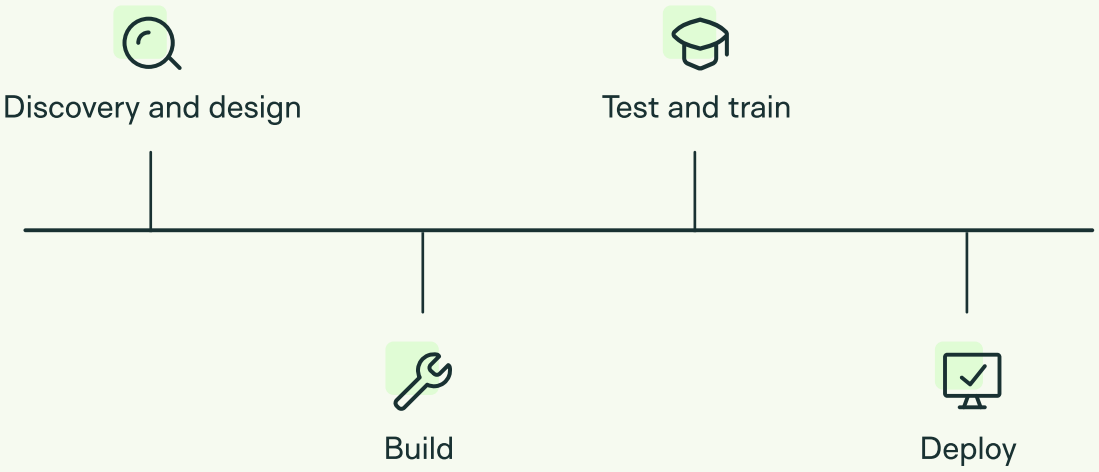
A well-structured business case ensures that each team—whether procurement, finance, or operations—sees how the platform supports their specific needs and the business overall. Technical knowledge gaps can be a roadblock, especially for stakeholders unfamiliar with emissions accounting. Simplifying complex data and providing tailored training helps teams engage without getting lost in jargon.

Resistance to change is inevitable, but positioning carbon management as a strategic advantage, rather than an obligation, makes adoption easier.



Implementation process and timeline

The implementation process typically takes between 4 to 12 weeks, depending on the complexity of your organization's needs, data integrations, and internal resources. A phased approach ensures that each stage builds on the last, allowing for a smooth transition and successful deployment. The next page covers a general outline of what to expect as your vendor guides you through the process.



1. Discovery and design

- Align project goals and gather critical information, including current processes, reports, and requirements.
- Conduct a design workshop to define ESG KPIs and system specifications.
- Establish a clear roadmap and approve a design balancing functionality, cost, and time.

2. Build

- Configure the platform based on the approved design.
- Complete data integrations and historical data imports.
- Conduct prototyping sessions for review and adjustment.
- Develop test plans to prepare for the next phase.

3. Test and train

- Verify the platform's functionality and resolve issues identified during testing.
- Ensure data accuracy and compliance with requirements.
- Conduct training sessions to prepare users for adoption.

4. Deploy

- Finalize the Go-Live checklist to ensure readiness.
- Launch the platform and provide post-launch support to address remaining issues.
- Gather feedback for continuous improvement and long-term success.

Each phase may vary in length based on your company's needs, but this structure ensures a thorough and effective implementation process.

Post-implementation support, adoption, and resources

Successfully implementing carbon management software is just the beginning. To maximize its value, organizations need ongoing support, strong adoption strategies, and close collaboration with the vendor to ensure long-term success.

A well-executed post-implementation plan helps teams integrate the software into daily workflows, maintain data accuracy, and continuously improve carbon management strategies.

Vendor-provided support

A reliable vendor should provide more than just software—they should offer ongoing support and expertise to help you make the most of your investment.

Key areas of vendor support include:

- → **Onboarding assistance**
  Training sessions, documentation, and onboarding resources to ensure your team is equipped from day one.
- → **System updates and upgrades**
  Regular feature enhancements and compliance updates to keep your platform aligned with evolving regulations and business needs.
- → **Professional services**
  Guidance for initiatives like target-setting, decarbonization, and more.
- → **Ongoing technical support**
  Clear service level agreements (SLAs), accessible support teams, and defined response times for resolving issues.

Adoption strategies for internal teams

Driving adoption across all relevant teams ensures the software is used effectively. Strategies to increase engagement include role-specific training for ESG teams, procurement, supply chain, finance, and operations to align the software with their daily tasks, gamification and incentives to encourage activity in the system, and regular feedback loops to refine workflows.

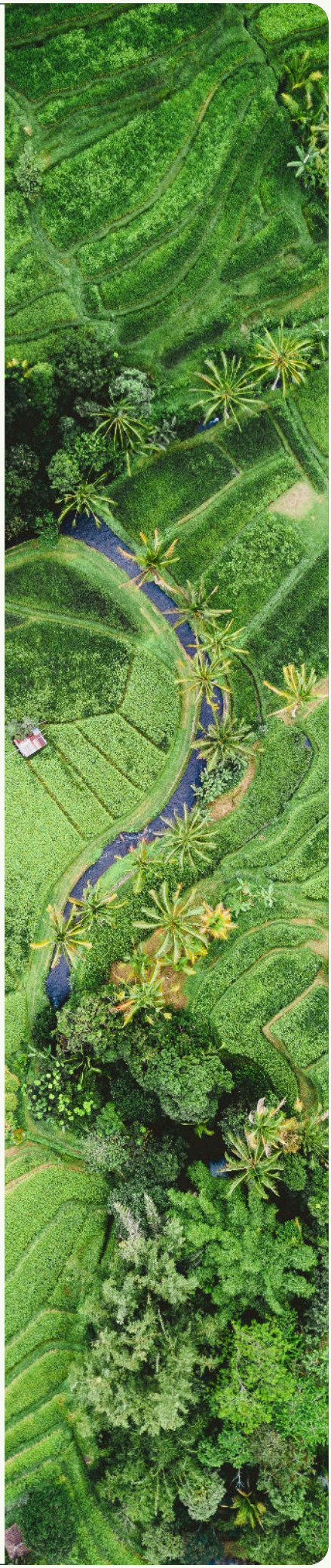
Internal resources to maintain success

Beyond vendor support, organizations should establish internal processes to manage and optimize the platform. Best practices include:

- → **Assigning system owners**
  Designate internal administrators or champions responsible for managing the software, troubleshooting issues, and training new users.

- → **Developing documentation**
  Create internal playbooks for workflows like data entry, report generation, and troubleshooting.

- → **Monitoring integrations**
  Regularly review data feeds and system integrations to ensure accuracy and efficiency across connected platforms.

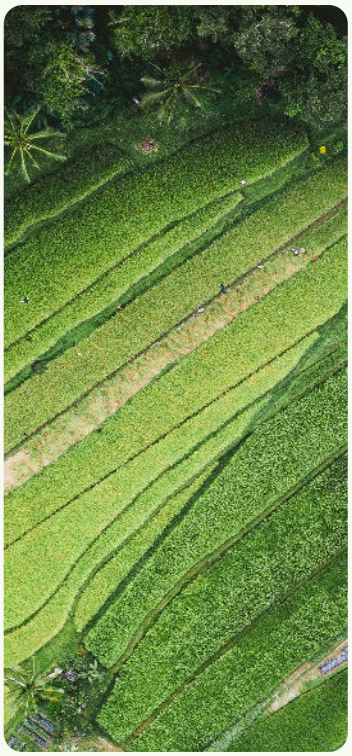


Continuous improvement and ROI tracking

Post-implementation success isn't just about keeping the system running—it's about maximizing its impact. Organizations should conduct periodic reviews with the vendor to optimize functionality and address evolving needs. As part of these reviews, track key performance indicators including data accuracy and reporting efficiency. You may also need to work with the vendor during these reviews to scale your platform license to accommodate company growth, regulatory changes, and expanded sustainability initiatives.

Checklist for post-implementation success

- Does the vendor offer robust ongoing support?
- Are internal teams trained and confident in the platform?
- Have system ownership and documentation been established?
- Is there a feedback loop for improvements and ROI tracking?



Conclusion

Choosing the right carbon management software and services is a critical step on the journey to meaningful decarbonization. The right solution combines robust software capabilities with expert services to ensure seamless implementation, ongoing support, and meaningful outcomes. From data accuracy and reporting to strategic decision-making and scalability, a thoughtful approach to vendor selection will set your organization up for long-term success in achieving its decarbonization goals.

Optera's "One Team" Approach

Optera stands apart by delivering a "One Team" approach to carbon management.

This means partnering with you at every step—from implementation to ongoing support—with no hidden fees or reliance on third-party providers.

Our cohesive team of experts ensures faster response times, seamless integrations, and end-to-end solutions tailored to your organization's unique needs.

With Optera, you get:

- Full-service implementation included in your software pricing, helping you **save time and money**.
- Dedicated experts who **streamline data management, compliance, and decision-making.**
- A trusted partner committed to transparency and helping you **achieve your decarbonization goals.**

Let Optera be the team that simplifies your journey to sustainability, so you can focus on driving impact and achieving your organizational goals.

Reach out today for a no-pressure consultation on your program and unique carbon management needs.