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PRB Worktrack Engaging Clients on Sustainability Impacts, Risks and Opportunities

*Essentials stream – Session #4
Building Organizational Capabilities & Securing Internal
Buy-in*

17 SEPTEMBER

PRB Client Engagement Workshop

Ways of working

Confidentiality & Chatham House Rules

Please **respect Chatham House rules** and do not attribute anything that was said within this meeting. Please do not share meeting papers or drafts of documents outside of the working group. Sharing documents before they are finalized and have gone through governance can hinder the progression of work.

Anti-trust & Competition law

Participants are reminded that it is their **responsibility to follow Anti-trust and Competition law obligations** across the countries in which they and UNEP FI are active. An exchange of information can achieve the same as an explicit agreement, and it is important to avoid exchanging information that might result in abuse of competition laws, even if only inadvertently.

As a result, there will be **no discussion or disclosure of any commercially strategic or sensitive information (including pricing, client-specific details, or forward-looking business strategies)** and any information shared will be limited to that necessary for the purposes of the agenda.

It is the responsibility of all participants to comply fully with competition law at all times, and to raise any concerns they may have in this regard in real time (whether at a meeting or in relation to a communication).

PRB Client Engagement WorkTrack Session #4

Meeting agenda

Agenda Item	Overview	Presenter(s)
1. Welcome	Welcome & introduction of the agenda and key objectives of the meeting	UNEP FI Secretariat
2. Peer case study	BNP Paribas on building internal capability for sustainability-driven client engagement.	Nathalie Jaubert, Head of Sustainability Strategy, Research and Expertise, BNP Paribas
3. Group Discussion: Securing internal buy-in	Peer discussion on shared challenges, trade-offs and good practices across banks' experiences.	Worktrack Participants
4. Business Case Resource pack	Update on Business Case Resource Pack development	UNEP FI Secretariat
5. Closing	2027 Planning worktrack updates & upcoming opportunities	UNEP FI Secretariat

PRB Client Engagement Worktrack

Quarterly plenary: Shared space to exchange insights across streams, emerging practices, and align on progress and priorities

#1 Essentials of Client Engagement on Sustainability

Cross-cutting building blocks applying to all sectors and client types:

- Business Case for Engaging Clients on Sustainability
- Strategy & Governance
- Capability, Culture & Incentives
- Client Insights & CTP Assessment
- Clients Dialogue & Engagement Journey
- Financing Solutions & Advisory

Target audience: Group Sustainability functions; Sustainable Finance teams

Corporate clients



#2 Sectoral Stream: Growth Sector – Digital Infrastructure, Data Centres and AI (*Opportunity-led engagement*)

#3 Sectoral Stream: Transition Sector – Agriculture (Dairy, Cattle, Livestock) (*Managing transition risks and financing credible pathways*)

- Sector Opportunities & Risks
- Engagement Strategies
- Product Strategy and Sustainable Finance Solutions

SME clients



#4 Supporting SME clients in their sustainability journeys (From Oct 2026)

Scalable, data-light engagement models to support SMEs

Target audience: Sustainable Finance teams; Sector/Coverage teams; Relationship managers, SME managers

PRB Client Engagement Worktrack – Essentials stream

Overview

What is this stream about?

The Essentials stream provides a structured peer-learning space for PRB banks to align on what good looks like in client engagement on sustainability, and to co-develop practical resources that support delivery in a fast-changing environment.

Key focus topics

- How banks build and communicate a credible **internal business case** that resonates with business teams and senior management
- How banks **organise client engagement** on sustainability across strategy, governance and operating models
- How sustainability insights, assessments and dialogue are used in **client conversations**
- How engagement translates into **concrete financing and advisory solutions**

Upcoming Client Engagement Resource Hub to include:

Business Case Resource Pack: a clear internal case for engaging clients on sustainability, at ExCo/Board level and within business units.

What good looks like: good practices in each theme, grounded in member practices and group discussions.

Case Study Library: a collection of real-world examples.



Engaging clients on sustainability impacts, risks and opportunities

BNP PARIBAS

The background image shows a group of rowers in a boat on a body of water during sunset. The sun is low on the horizon, creating a golden glow on the water's surface. The rowers are silhouetted against the bright light. A large, semi-transparent orange shape with a pattern of small circles is on the left side of the image. The text is overlaid on the upper left portion of the image.

Engaging clients on sustainability impacts, risks and opportunities

3. Group Discussion

Securing internal buy-in for client engagement

Group discussion

During this section, we are gathering practical insights to identify what “good” looks like and the concrete practices to share with the PRB community.

Focus topics

1

Bringing relationship managers and client-facing teams on side

- What has worked, or not, in getting frontline colleagues on board?
- What convinces them most: a commercial case, the right incentives, simple talking points, or proof clients are asking?

2

Securing buy-in and approval from senior stakeholders

- Which stakeholder is hardest to convince, and what do they weigh before saying yes? What has made the difference in getting their approval?
- What UNEP FI guidance would make this easier?

Some takeaways from the June London in person workshop

Bringing RMs & client-facing teams on side

- Commercial, sector-specific language (energy costs, yield, resilience) persuades more than sustainability terms
- Give RMs a ready-to-use business case and low-burden tools; peer case studies (social proof) carry more weight than abstract argument

Securing senior stakeholder buy-in

- Mandates, governance and accountability, with senior sponsorship, beat individual goodwill; break down risk, sustainability and commercial silos
- Lead with client value and revenue within existing risk parameters, rather than compliance



Engaging clients on sustainability impacts, risks and opportunities

Business Case Resource Pack

PRB Business Case Resource Pack Status update

Status update

PRB Business Case Resource Pack	Status
PART 1: What is the business case for engaging clients on sustainability	<div>IN REVIEW</div> Circulated & open for written feedback
PART 2: Crafting a compelling business case for internal stakeholders in your bank	<div>UPCOMING</div> To be circulated by early October
PART 3 & 4: Obtaining support from the Board, executive committee, client-facing teams and business heads	<div>PLANNED</div> To be drafted, based on conversation with wortrack participants

Call for case studies: we’re looking for PRB members willing to work with us to feature their approach to client engagement on sustainability (i.e., operating model, incentive schemes, success stories, training, etc.)

Format: We’re aiming to make the full pack available to PRB members in a user-friendly format on the website.

Timeline: Q4 2026



Engaging clients on sustainability impacts, risks and opportunities

Closing

2027 Planning

Participants input

As we begin planning the worktrack for 2027, we want to shape it with you. We would welcome your input on the following:

Topics and priorities

Which themes would be most valuable to cover next, and where should we go deeper on work we have already started?

In-person opportunities in 2027

Which international or regional conferences or gatherings you already attend could be good opportunities for an in-person session?

Voices and expertise

Are there any external experts, peer banks, or other perspectives you would like us to bring into the room?

Format

Are there any other formats you would like us to experiment with (e.g. smaller group discussions, regional peer exchanges, online community)?

PRB Client Engagement Worktrack

Schedule Sept-Oct 2026

#	Session Title	Meeting date
1	<i>AI stream:</i> From data to decisions: Measuring sustainability in digital infrastructure / data centres	23 Sept 2026
2	<i>Agri stream:</i> Methane, Land Use & Climate Transition: How & why banks should request data?	30 Sept 2026
3	<i>SME stream:</i> Kick off session	7 Oct 2026
4	<i>Agri stream:</i> Nature, Water, Pollution, & Social Data: How & why banks should request data?	8 Oct 2026
5	Worktrack plenary session on Assessing and Using Clients Transition Plans (CTP) for risk & opportunities	13 Oct 2026
6	<i>AI stream:</i> Client transition plans of hyperscalers and data centre operators	21 Oct 2026

Supporting SME clients in their sustainability journeys - Kick off on Oct 7

The workstream will explore how banks can engage SME clients on sustainability at scale, covering topics such as the business case, scalability, data and measurement, AI-enabled approaches, and partnerships and ecosystem solutions.

Contact point: Laura Diaz (laura.diazzea@un.org) & Esther Tsang (ching.tsang@un.org)

Closing

New PRB Work for Risk Function

Guidance *A Chief Risk Officer's Guide to the Principles for Responsible Banking* | 24 September

This PRB's first guide written for the risk function shows how the risk function can implement the PRB through the bank's existing risk management framework, with practical actions, questions to ask, and case studies from signatory banks.

Webinar *The Role of Risk in Responsible Banking* | November 3

The session will present key insights from the CRO guide & showcase a peer bank's experience of integrating sustainability into risk management. Register here: [10:00 CET](#) | [16:00 CET](#)

Focus group: *Developing an Operational Playbook for Sustainability Risk Integration* | Late November

We are setting up a small, invitation-only group for risk and sustainability managers interested in 'getting their hands dirty' on sustainability risk integration and helping develop an operational playbook for the PRB Membership

PRB Community of Practice for risk functions | 2027

The PRB will be setting up a dedicated community for risk functions in members, to provide a space for peer learning to share good practices for common challenges.

Reach out to Wendy Dobson (wendy.dobson@un.org) and Oualid Rokneddine (Oualid.rokneddine@un.org) to get involved!

PRB Client Engagement Worktrack

Workstream focal points

Workstream	Focal point
#1 Essentials	Oualid Rokneddine (oualid.rokneddine@un.org)
#2 AI & data centres	Alice Anders (alice.anders@un.org)
#3 Agriculture	Sam Burke (samantha.burke@un.org)
#4 SME	Laura Diaz (laura.diazzea@un.org) & Esther Tsang (ching.tsang@un.org)