Generation Impact Global

QB-EDGE™

WHITE PAPER

From questionnaire to defensible KPI

How to collect ESG data from portfolio companies, suppliers and borrowers, and explain every figure that comes out.

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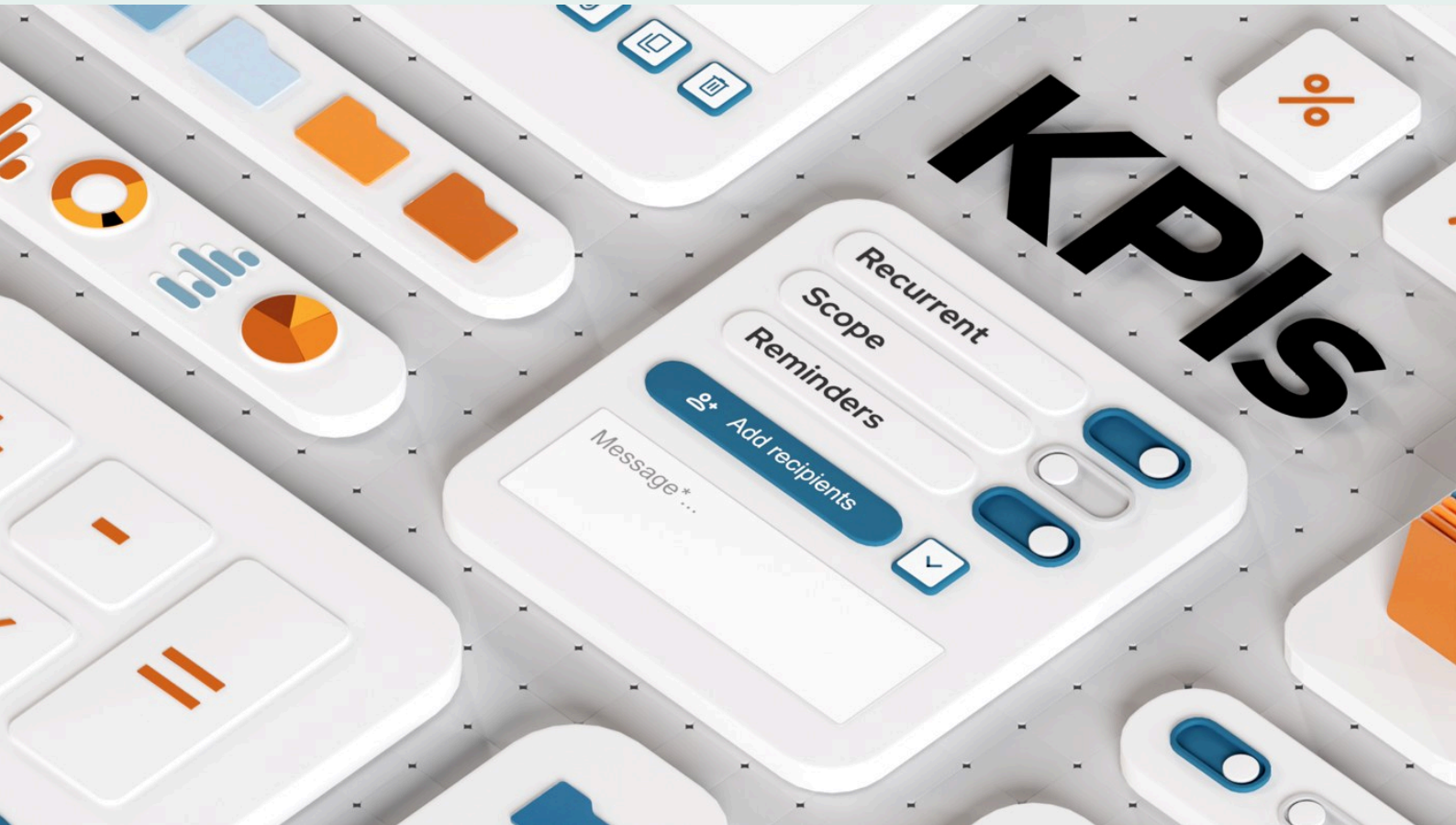

SUMMARY

The figure is only as good as the way it was collected

Many sustainability figures start as an answer in a questionnaire. Somebody asked a question, somebody else answered it, and a number travelled from there into a report.

This paper is for the team on the sending side: the people who ask the questions and are later asked to explain the answers. It describes a simple working model and shows how QB-EDGE™, the questionnaire and KPI tool from Generation Impact Global (GIG), applies it.

1

Three roles, kept apart

VitAI™ prepares. Rules decide. People approve. Each role has clear limits.

2

One questionnaire, many periods

The same questions return each period, so figures can be compared.

3

Review before use

A person approves or rejects each submission. Only accepted ones enter the Benchmark.

4

Calculation in the open

Scores and KPIs come from weights and formulas you set and can show.

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1 · THE PROBLEM

Where collected data goes wrong

A figure is defensible when you can answer four plain questions about it: who gave it, what exactly was asked, who checked it, and how it was calculated.

In our experience, data requests run by email and spreadsheet tend to lose that trail in the same five places.

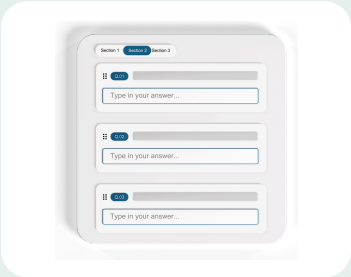


Weak point	What happens	What you need instead
The questions drift	Wording changes from one period to the next, so last year's figure and this year's are not the same thing.	One template, reused each period
Everyone gets every question	Respondents answer questions that do not apply to them, or skip them without saying why.	Questions that appear only when relevant
Answers go straight into totals	A wrong unit or a typing error reaches the report because nobody stopped it.	A review step with a clear accept or reject
The formula lives in a cell	The KPI is calculated in a private spreadsheet that only its author can explain.	Formulas stored next to the questions
Corrections leave no record	A value is changed after a phone call. Later, nobody can say when or why.	A log of each submission and decision

Why this matters now. Under Directive (EU) 2026/470, in force since March 2026, mandatory CSRD reporting is limited to companies with more than 1,000 employees and more than €450 million in net turnover. Smaller suppliers, portfolio companies and borrowers still receive data requests, often from several senders. For its own CSRD report, a reporting company may not require a value chain company with up to 1,000 employees to give more than the EU voluntary standard specifies, and that company may decline. A short questionnaire that asks only what applies also respects the respondent's time.

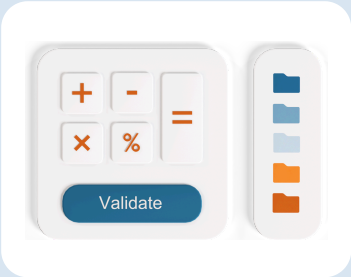
VitAI™ prepares, rules decide, people approve

AI is useful for the slow parts of this work. It should not be the one that decides a score or signs off a figure. QB-EDGE™ keeps the three roles apart.



VitAI™ prepares

VitAI™ is GIG's AI. It drafts questionnaires and drafts answers from documents. A drafted answer is a proposal until a person applies it.



Rules decide

Scores, show and hide logic and KPIs are calculated from weights, conditions and formulas that you set. The same input gives the same result.



People approve

A respondent applies each drafted answer. A reviewer accepts or rejects each submission. Both actions are recorded.

What each role may and may not do

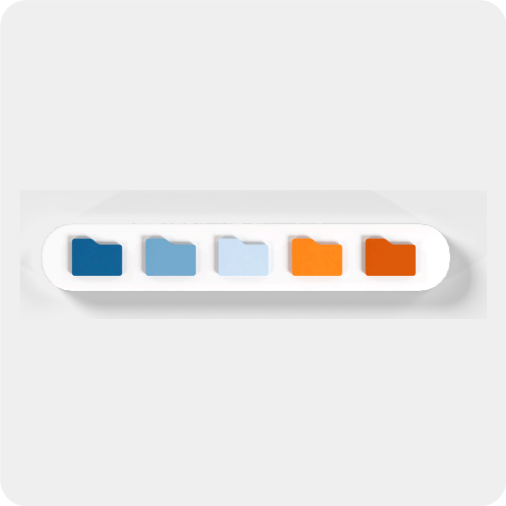
Role	Does	Does not
VitAI™	Copies an existing questionnaire, drafts questions, drafts answers, suggests framework mappings	Save an answer on its own, calculate a score, approve a submission
Rules	Calculate scores from weights, show or hide questions, compute KPIs from formulas	Change without you editing them
People	Write or edit questions, apply drafts, flag, approve, reject	Hand over the decision: only a person approves or rejects a submission

> **A note on AI.** VitAI™ can make mistakes. That is why each drafted answer is shown beside the passage it came from, and why nothing is written until a person applies it.

3 · BUILD

Build the questionnaire once, and build it well

A template is the fixed point of the whole process. Everything later, from review to KPIs, refers back to its questions.



Three ways to start

- **Copy what you already have.** Upload a PDF, Word, Excel or CSV file. VitAI™ keeps the order, the wording and the skips. Scanned PDFs without text are not read.
- **Draft from an instruction.** Describe the questionnaire and VitAI™ writes up to 150 questions in a run. The cost in credits is shown before you start.
- **Import from a framework.** GRI and ESRS disclosures can be imported as ready-made questions.

16

Question types

Yes/no, single and multiple choice, number with unit, date, scale, matrix and more. The type decides what can be scored and calculated later.

9

Condition operators

Equals, contains, between and six more, joined with AND or OR, across several earlier questions.

Ask only what applies

A condition shows a question only when an earlier answer calls for it. A supplier that does not measure emissions is not asked for its emissions figure. If a question becomes hidden, its answer is cleared, so it cannot reach results or exports by accident.

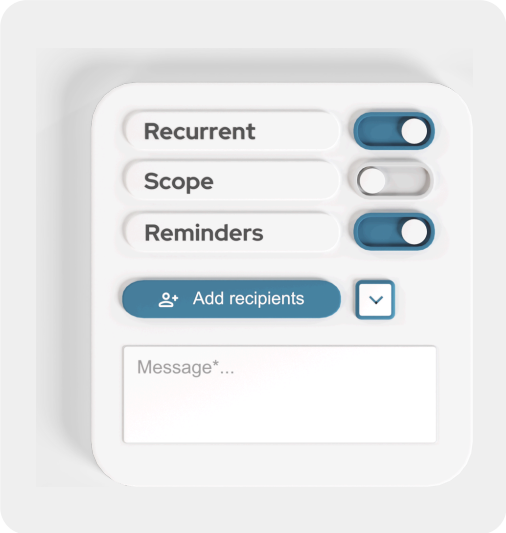
Map to frameworks while you build

Questions can be mapped to items in GRI, ESRS, SASB, SFDR and VSME, and VitAI™ can suggest mappings. On a mapped question, a respondent who has already answered the linked framework item on the GIG platform sees that answer and can copy it in.

Send, follow up, and check before you count

Distribute

- Send to companies, funds, internal users, or external contacts by email.
- Send once, or on a schedule: monthly, quarterly, half-yearly or yearly. The next period is created for you.
- Set a deadline and automatic reminders.
- Switch on comparison to show last period's values beside the current ones.



Help the respondent

- Respondents answer alone or with colleagues, and can reuse an earlier answer.
- With Fill with VitAI™, they add their documents and receive drafted answers, each beside its source passage. It works on 14 of the 16 question types, and not on questions imported from GRI or ESRS.
- Nothing is saved until the respondent applies it in the review.

Review every submission

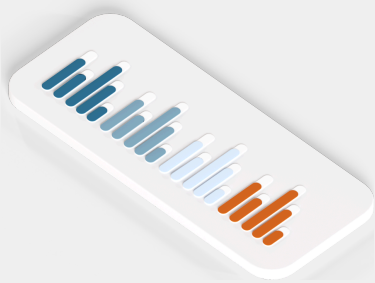
Step	Action	What is recorded
1	The respondent submits	The submission, in the history log
2	You read the answers	Status of each respondent in the overview
3	You flag the questions that need work and add a note to each	The request for correction and your notes
4	You approve or reject	The approval or rejection

> **An illustrative example.** A supplier with about a hundred staff reports 62,000 tonnes of CO_2e. The reviewer flags that one question, writes "Please check the unit", and sends it back. The corrected value arrives as a new submission, and both rounds stay in the log.

5 · SCORE, CALCULATE, COMPARE

Turn accepted answers into figures you can explain





Scoring

Put a weight on answer options in single choice, multiple choice and yes/no questions. With weights from 0 to 100, scores read on a 0 to 100 scale. An option without a weight stays out of the score.

KPI engine

A KPI copies one answer or calculates a spreadsheet-style formula over several, from the current or the previous period. Each KPI has a unit, and the formula is checked before you save.

Benchmark

Averages across your own panel and per group, for example per sector. Only accepted questionnaires count. No outside market data goes in.

Reading the results

View	Shows
By question	Every answer to the same question, as a bar, donut, line, radar or word cloud chart
By respondent	All answers from one respondent
By KPIs	The KPIs of each respondent
Comparative view	Respondents side by side
Custom tables	Rows from questions and formulas, with tags and colour thresholds

Results, a single respondent's answers and the Benchmark all export to Excel.

> **Privacy in the Benchmark.** If you switch visibility on, each company sees its own score beside the averages. It never sees another company's name or score.

6 · USE

Who uses it, and for which frameworks

Fund managers and private equity

Collect portfolio company data every period with a recurring questionnaire. A holding can let its funds send the questionnaire themselves.

Corporates

Ask suppliers and business units the same questions, then score and compare the answers.

Banks and financial institutions

Collect sustainability data from the companies they finance, and review it before use.

Award and rating organisers

Score applicants with weighted questions and show each one where it stands against the panel.

Beyond ESG

The builder has no fixed topic. You decide the questions, the scoring and the recipients. You can also use it for supplier assessments and for the questionnaires behind supply chain due diligence, for example under the EU Corporate Sustainability Due Diligence Directive (CSDDD), which applies to the largest companies from July 2029.

QB-EDGE™ collects and documents the answers. The legal assessment stays with you.



Framework links

Framework	Map questions to it	Import as ready-made questions
GRI	Yes	Yes
ESRS	Yes	Yes
SASB	Yes	No
SFDR	Yes	No
VSME	Yes	No

The interface is available in English, Italian and French. Each questionnaire template is written in one language. Framework mapping and ESRS import depend on the products in your plan.

Four set-ups, step by step

Each example shows a common problem, how the questionnaire is set up in QB-EDGE™, and what you get at the end.

FUND MANAGER

Yearly ESG data from portfolio companies

Problem. Each company sends a different spreadsheet, so figures cannot be compared.

1. Copy last year's questionnaire file with VitAI™, or build the template by hand.
2. Send it as a yearly recurring questionnaire, with comparison to the previous period switched on.
3. Review each submission. Flag a wrong value and send it back with a note.
4. Let the KPI formulas calculate per company, and read the Benchmark by sector.

Result. Figures you can compare year on year, and a Benchmark by sector.

CORPORATE

Supplier sustainability assessment

Problem. One long questionnaire goes to every supplier, and many do not finish it.

1. Add conditions, so a supplier only sees the questions that apply to it.
2. Put weights on the answers that matter, to get a score per supplier.
3. Send by company or to external contacts by email.
4. Respondents can attach evidence files. The log keeps rejections and approvals.

Result. A scored, comparable supplier list, with a record of each review decision.

BANK

Sustainability data from business clients

Problem. Smaller clients have little time and no reporting team.

1. Keep the template short and map the questions to VSME.
2. Clients add their own documents and let Fill with VitAI™ draft the answers.
3. They check each draft against its source passage and apply it.
4. You review each submission before the data is used, then export to Excel.

Result. Drafts for the client to check, and reviewed data for you.

AWARD ORGANISER

Scoring applicants on one scale

Problem. Applications arrive as free text and are hard to rank.

1. Use choice and yes/no questions with a weight on each option.
2. Send one questionnaire to all applicants with a deadline and reminders.
3. Accept the complete submissions. Only these enter the averages.
4. Switch visibility on, so each applicant sees its own score beside the panel average.

Result. Comparable scores, and feedback each applicant can read.

The examples are illustrations of how the product can be set up. They do not describe real customers.

See QB-EDGE™ with your own questionnaire

generationimpact.global/products/qb-edge

Start free | Request a demo

QB-EDGE™ and VitAI™ are products of Generation Impact Global SA, Geneva. Product details describe the November 2026 version, may change and depend on your plan. This paper is general information, not legal advice.