Large Company B Corp Certification

BEST PRACTICES GUIDE

"B Corp Certification is more than a stamp; it's a philosophy for running your business."

Alexandra Heaven, Global B Corp Manager, Danone

JOIN THE B CORP COMMUNITY!

You've decided to engage in one of the most rigorous and rewarding processes your business will undertake. This is not a journey for the faint of heart. It requires a level of work and persistence that the average company isn't willing to take on. Yet those businesses that have engaged in B Corp Certification have seen remarkable results: employees unleashing untapped creativity and commitment, increased customer loyalty, business innovation, and marketplace leadership.The B Corp movement is larger than any one business and aims to inspire all companies to use business as a force for good. It may seem a lofty goal, but it's already happening, and we want you to be part of it, too.

"B Corp Certification serves as a roadmap for your sustainability and social impact work."

Sara Newmark, Vice President of Social Impact, MegaFood

B Lab

Introduction

We developed this guide based on the experiences of ten large companies who earned B Corp Certification. From them, we gleaned useful tips and practices—and examples of common barriers and challenges. This guide will provide you with a general overview of the internal processes and tools required to be successful, as well as clear expectations of the workload and resources you will need to accomplish your goal of becoming a Certified B Corp.

Please note: This guide will serve as your internal resource for the Certification journey. However, B Lab will work with you to determine your exact process steps - please reach out to us when you are ready to get started! Contact: kpeck@bcorporation.net

If your company earns <$100M USD annually, please refer to this guide.

"Becoming a B Corp has really challenged our teams in new ways and will continue to further empower them to think about things differently."

Catherine Queen, Manager of Sustainable Development & B Corp, Danone North America

Special thanks to the following B Corps who provided their time and expertise to help us create this guide:

DANONE NORTH AMERICA
EILEEN FISHER
MegaFood Fresh From Farm To Table™
ATHLETA
SIR KENSINGTON'S
rhino FOODS
HappyFAMILY ORGANICS
Bama
DR. BRONNER'S ALL-ONE!
TRADITIONAL MEDICINALS wellness teas SINCE 1974

Thanks to the team at Heather Paulsen Consulting (HPC) who researched and authored this guide: Heather Paulsen, Erica Harrold, Jendi Coursey and Michelle Noe. HPC is a Certified B Corp that assists mission-driven businesses in becoming Certified B Corps and other projects that build an economy (and a world) that works better for all: owners, employees, suppliers, customers, our communities, and the environment.

HEATHER PAULSEN CONSULTING

Certification consists of the following steps:

1 PRE-ASSESSMENT

(1–2 MONTHS)

- Complete a discovery process with B Lab
- Determine whether certification is viable at this time
- Get the requisite support from key leaders

See page 3

2 ASSESSMENT

(4–6 MONTHS)

- Create project management processes
- Establish, educate and inspire your internal champions (B Team)
- Collect data and supporting documentation
- Complete the B Impact Assessment v(BIA)

See page 7

3 VERIFICATION

(3-6 MONTHS)

- Finalize the BIA
- Submit documentation
- Implement improvements, if needed, to raise your score to >80 points
- Sign the Declaration of Interdependence
- Plan your B Corp Certification launch/announcement

See page 11

4 ENGAGEMENT

(ONGOING)

- Share your certification news with all stakeholders
- Use the BIA framework as a roadmap for continuous improvement (integrating it into strategic planning, business practices, employee evaluations, and more)
- Use the BIA to measure progress annually and plan for re-certification

See page 14

For more detail, see Toolkit Item 1 : B Corp Certification Checklist

Pre-Assessment

During Pre-Assessment, you'll learn whether your business has the potential to successfully complete the B Corp Certification process. This discovery phase helps ensure you have what it takes before tackling the full B Impact Assessment (BIA).

PRE-ASSESSMENT ELIGIBILITY CHECK

Complete these steps to determine whether B Corp Certification is feasible at this time.

☐ **DISCOVERY WITH B LAB**	Connect with B Lab to share details of your business operations, legal structure and related entities to determine the right approach to your certification. See more information about the Discovery Process.
☐ **PRELIMINARY ASSESSMENT**	Take a preliminary run through the BIA to become familiar with the B Corp assessment process and gain a sense of your readiness.
☐ **DISCLOSURE QUESTIONS**	These unscored questions allow your leaders and legal team to determine whether they are comfortable with the level of transparency required to become a B Corp.
☐ **LEGAL REQUIREMENT**	Certified B Corporations must amend their corporate governing documents or adopt a corporate form that explicitly requires the consideration of all stakeholders, not just shareholders, in their decision-making. Whether you choose to meet the legal requirement now (it's worth points!) or post-certification, it is important to educate your leadership and legal team about this requirement early in your project. **All for-profit entities are eligible to become Certified B Corps (corporations, LLCs, cooperatives, sole proprietorships, and more).**

Once you're confident you have executive support and a green light from the legal team, visit bimpactassessment.net to begin.

UNDERSTAND THE REQUIREMENTS

PERFORMANCE REQUIREMENT

B Corporations must earn a score greater than 80 points on the B Impact Assessment, complete a Disclosure Review regarding sensitive and controversial issues that may not be included in the score of the BIA, and be re-certified via the same process every three years. Scores are verified through B Lab reviews, supporting documentation and (sometimes) onsite visits.

TRANSPARENCY REQUIREMENT

B Corporations are required to make their B Impact Assessment score reports public, as well as any information from the Disclosure Questions that warrants transparency with stakeholders. Publicly traded companies and wholly-owned subsidiaries are also required to make their answers to the B Impact Assessment transparent, with sensitive questions potentially redacted.

LEGAL REQUIREMENT

Certified B Corps must amend their corporate governing documents or adopt a corporate form that explicitly requires the consideration of all stakeholders, not just shareholders, in their decision-making. Understand your legal requirement.

THE SUPPORT YOU'LL NEED

DEDICATED PROJECT MANAGER

The most important role in the B Corp Certification process is the dedicated project manager. This project manager can work with your internal champions (B Team) to gather data and complete the process. Company leaders should assign a project manager to complete the preliminary B Impact Assessment to determine whether your organization is ready for the full certification process.

EXECUTIVE SUPPORT

Because certification involves a substantial time commitment and significant public transparency, we recommend securing the support of executive leaders and, if applicable, board members and/or shareholders early in the process. Support from senior leaders paves the way for certification-related teams within your organization to assign appropriate resources for B Corp Certification activities such as collecting data for the assessment or formalizing best practices into policy.

LEGAL SUPPORT

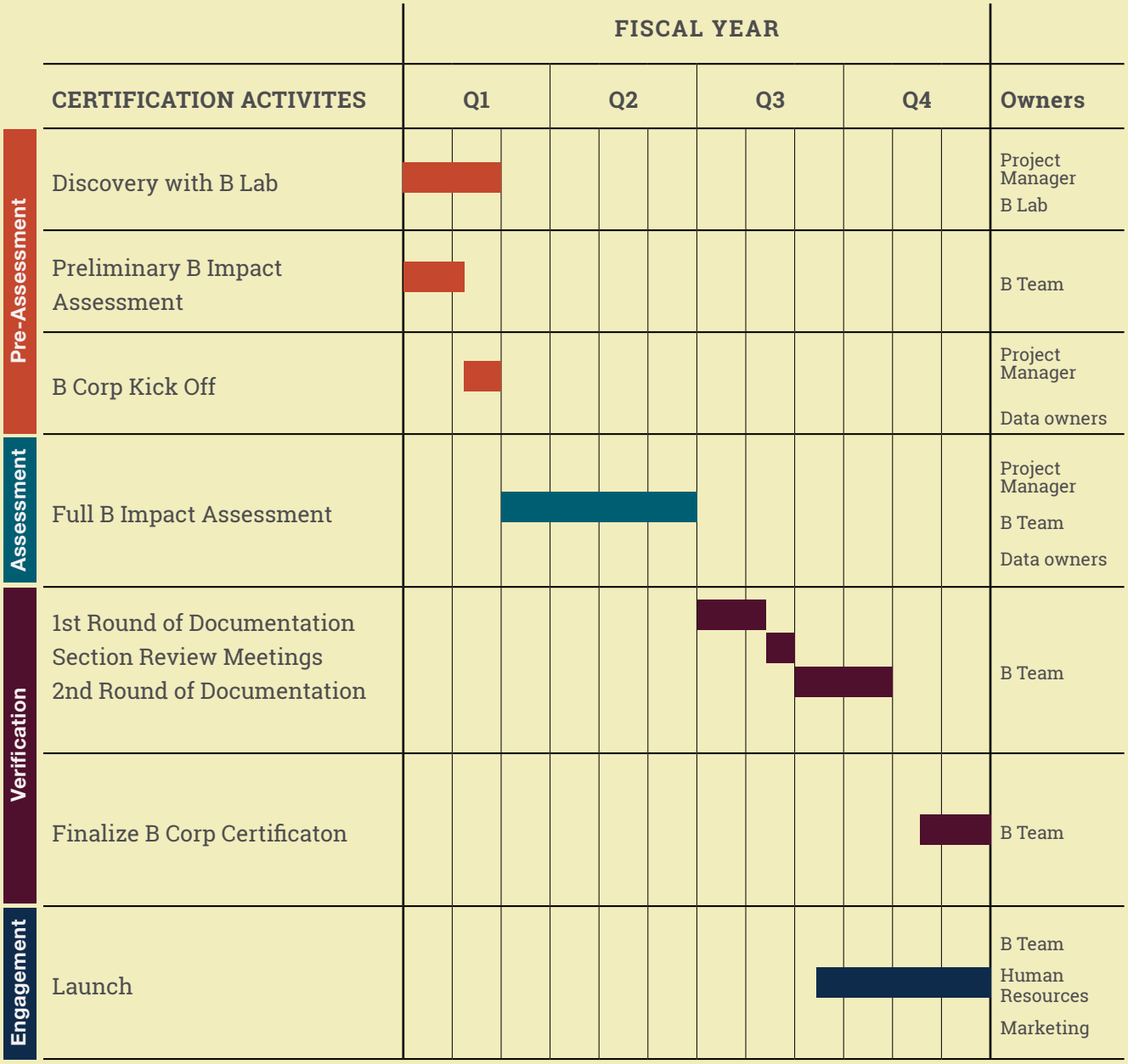
The transparency and legal requirements can often make lawyers and executive leaders uncomfortable because this is new territory. While the transparency required for B Corp Certification can be a challenge, it is rarely insurmountable with the right internal support.

THE FIVE AREAS MEASURED & WHO HAS THE DATA

Impact Areas	What's covered?	Who has the data?
GOVERNANCE	• Mission & Engagement • Ethics & Transparency	• C-Suite • Finance • Legal
WORKERS	• Financial Security • Health, Wellness & Safety • Career Development • Engagement & Satisfaction	• Human Resources
COMMUNITY	• Diversity, Equity & Inclusion • Economic Impact • Civic Engagement & Giving • Supply Chain Management	• Corporate Social Responsibility • Human Resources • Procurement
ENVIRONMENT	• Environmental Management • Air & Climate • Water • Land & Life	• Purchasing • Sustainability • Facilities, Operations
CUSTOMERS	• Customer Stewardship	• Sales & Marketing • Customer Experience

SAMPLE TIMELINE

B Corp Certification project timelines vary widely depending on resources dedicated to the project, target deadlines, marketing considerations, and other strategic objectives. Timelines can range from three months to two years (or more). Some companies delay certification to maximize points while others certify as soon as they reach the 80-point threshold. See a sample timeline below.



The above example is adapted from Athleta

Assessment

During Assessment, the project manager works with B Team members to collect the information required to complete the B Impact Assessment. It's important to engage key participants early in the process by educating them about the value of B Corp Certification.

REGISTER FOR THE BIA

Begin by registering for the B Impact Assessment.
Get Started

DOWNLOAD THE ASSESSMENT

Download the Excel version of the BIA and identify a data owner for each section. Several companies have customized the Excel tracking sheet with additional columns and organized each topic area into a separate sheet to facilitate data collection. Use the excel sheet as a project management tool to supplement the rich resources (such as help text, examples and best practices) embedded within the BIA online.

See Toolkit Item 2: BIA Excel Template for an example.

"You can't manage what you don't measure. B Corp Certification helped us formalize practices that weren't in our employee handbook and prioritize our work to have the biggest [social and environmental] impact."

Katie Clark, Director of Sustainability, Happy Family

ESTABLISH YOUR B TEAM

Once you've identified the Topic Owners for each section of the assessment, pull them together to establish your B Team. Establishing regular B Team meetings—with clear deadlines and resources for support—helps maintain the momentum needed to complete the assessment. As the project manager, you may also choose to provide your Topic Owners with their relevant section of your BIA Excel Template and to hold individual meetings with B Team members to review topic-specific questions.

Toolkit Item 3: Topic Owner Guide for reference

B TEAM MEMBERS	WHY
Senior Leadership	Support for project and resource allocation
Legal	Disclosure and articles of incorporation
Human Resources	Employee benefit and demographic questions
Procurement	Supply chain questions
Sustainability	Environmental and social impact questions
Finance	Revenue and expenditure questions
Marketing	Education and communication

EDUCATE AND INSPIRE YOUR B TEAM

As you begin collecting data, it is helpful to start educating participants about what B Corp Certification is and why it's important. Kick-off meetings with your B Team, with vice presidents, the legal team, and with Topic Owners are an effective way to generate buy-in and enthusiasm for the complex project you're launching. Answering the question, "What's in it for me?" for each part of your company is critical to the success of the project. This helps build excitement and momentum, which often translates into faster turnaround times for data collection. Of course, building B Corp project support into an employee's evaluation also increases the odds of timely participation.

DATA GATHERING & DOCUMENT COLLECTION

Keep in mind that for every affirmative BIA answer, you may need to provide supporting documentation. Therefore, it is vital to keep detailed, up-to-date records throughout the project.

Consider the following options:

- Keep links to supporting documents in your master Excel spreadsheet.
- Use project management tools like Asana, Dropbox, SmartSheets or Google Docs to organize and store documents.
- Maintain a record of who provided the information and where it came from.
- Don't forget to complete the BIA online

"The assessment is a good mirror; it gives us an objective reflection on who we are as a business."

Rebecca Magee, Manager, Social Innovation and Entrepreneurship, Eileen Fisher

As you gather data, it is imperative that you track your methodology and back-up documentation. You will be required to show your work at many points in the certification process. To avoid repeated requests to staff and colleagues, we highly recommend maintaining detailed record-keeping during the data collection process.

STRATEGIES TO OVERCOME OBSTACLES

As a project manager, you may experience push-back when you request data and ask others to implement change to meet certification standards.

Following are some potential strategies to deal with resistance:

- Educate employees about B Corp Certification, sharing specific details on how their contribution matters to the process
- Show colleagues how the BIA helps them achieve their goals and supports their work.
- Engage with B Lab's legal team for support with the legal and tranparency requirements.
- If your operations are global, consider including a B Team member from each language group.
- To get answers without having direct authority over Topic Owners, conducting one-on-one interviews or providing a list of questions specific to the data owner can be helpful.
- Consider dividing the work among B Team members. Then, when asking for data or policy change, select the B Team member best suited to make the request based on personality, knowledge-base, relationship, or other criteria.
- Having a target date for certification, such as a key tradeshow, helps keep the project moving forward.
- Keep senior leaders informed about progress and the support needed to meet certification goals.

REACH OUT TO THE B CORP COMMUNITY

Most members of the B Corp community (especially the individuals involved in certification) are enthusiastic ambassadors and will be happy to help. Look through the B Corp Directory for companies in your industry reach out to them directly or ask your B Lab contact to make introductions.

Finally, as you get close to submitting your assessment, review your baseline score with your B Team and identify opportunities for improvement. Your BIA Excel Template can help you prioritize improvement areas by evaluating the points available, difficulty level for implementation, and feasibility of implementation. Once you are close to the 80-point benchmark, submit your assessment.

Note: If your score is comfortably above 80 points, this may be the perfect time to reach out to B Lab to begin planning the announcement about your B Corp Certification.

Verification

During the Verification process, B Lab reviews your BIA submission and asks for documentation and clarification to determine your final BIA score. Be aware that your score will fluctuate during the verification process. For large companies verification includes a Review Call(s) and may include an onsite visit.

VERIFICATION PROCESS

- Submit your B Impact Assessment
- B Lab will contact you to schedule your Review Call
  (B Lab's lead time may be up to 90 days to schedule your Review Call)
- B Lab will identify documents within the BIA required for upload
- Upload documents
- Invite Topic Owners to be present during the Review Call
- Complete your Review Call with B Lab
- Submit additional documents requested by B Lab
  (There may be multiple rounds of documentation submission)
- Prepare for and host B Lab's site visit, if applicable
- When you receive confirmation that your final score is 80 points or higher, B Lab will send you the term sheet, invoice and Declaration of Interdependence to sign

"B Lab's standards are demanding and ambitious, they provide a great framework for Danone to evaluate our priorities and improve. When one of our subsidiaries reaches the 80 bar mark it is only the start of a journey towards more positive impact."

Alexandra Heaven, Global B Corp Manager, Danone

COORDINATE YOUR LAUNCH

Once your B Corp Certification is official, it's time to launch!

As you wrap up the certification process, connect with B Lab for best practices, resources, and idea, plan the announcement of your certification—both internally with employees, board members and shareholders, and externally with suppliers, vendors and the public. Certification launches are as unique as the companies that certify and should reflect your brand and company culture. Working with Marketing, Public Relations, and Human Resources to determine your short-term and long-term communication goals will help set the tone for your launch. Employee and customer engagement with your launch can be one of the more rewarding aspects of this work.

Refer to Toolkit Item 4: Post Certification Engagement/Communication Ideas to see several ways you can share the news about your certification.

"We believe with Athleta's growth comes an even greater responsibility to lead as a force for good."

Nancy Green, President & CEO, Athleta

LAUNCH IDEAS

TALENT & CULTURE	• Announce certification in the company newsletter, at staff meetings, and via bulletin boards/posters • Incorporate B Corp values into employee onboarding and reinforce them during annual training • Invite employees to join the B Hive (online community for B Corps), follow B the Change on Medium or sign up for emails, follow B Corp social media channels • Host a certification celebration with employees
WEBSITE	• Put the Certified B Corp logo on your website • Add a B Corp section and explain why you became a B Corp
SOCIAL MEDIA	• Announce certification via social media channels • Share certification news through the company blog • Create video content • Invite engagement via social media with contests/surveys • Share B Corp highlights and stories
EMAIL	• Include the B Corp logo in all email signatures • Announce certification via email to customers
PRINT & PACKAGING	• Utilize the B Corp logo on assets • Print a brief B Corp message where appriopriate (labels, order confirmations, etc.) • Include the B Corp logo on the catalog and other print collateral • Add a B Corp feature story to the catalog
IN STORE	• Include the B Corp logo on store windows, employee uniforms, etc. • Add B Corp messages on the bottom of receipts • Create rewards/empowerment for store employees
PUBLIC RELATIONS	• Publish a press release • Host a public launch event/celebration • Plan speaking engagements/public roadshow • Pitch a feature story in your favorite trade publication

See Toolkit Item 4: Post-Certification Engagement/Communication Ideas

Engagement Post-Certification

Certification is not the finish line, but rather the beginning of a lifelong journey in the ethos of social, environmental, and business improvement in a company. Companies that have benefited most from their B Corp Certification are the ones that have integrated B Corp values into all aspects of their business and company culture.

"We delivered the news [of becoming a B Corp] to the team very intentionally. We told them, 'Yes, this is a badge of honor, but more than anything, it's a responsibility.' We've committed to being this type of company and that means that we'll have to continually improve and work more and more to consider stakeholders in all of our decisions...People here are super proud of being a B Corp."

Rebecca Gildiner, Impact Strategy Manager, Sir Kensington's

If you haven't completed the legal requirement during certification, you must complete it during post-certification.

EMPLOYEE ENGAGEMENT

By utilizing the Post Certification Engagement/Communication Ideas provided in the Toolkit, you can plan a B Corp Communications Roadshow to ensure employee engagement. For maximum impact, it's best to communicate early and often: host a kick-off meeting, include updates in employee newsletters, share highlights in staff meetings, and bring it up in lunchroom discussions.

Bama Companies designed their B Team by choosing one member from every major department, and they held mandatory meetings on a regular basis (monthly at first, then weekly as certification drew near). After certifying, they held a huge webinar with their top 20 suppliers and trained their field team to talk about B Corp with their customers.

CONTINUOUS IMPROVEMENT

Many companies use the certification process as an ongoing methodology and tool for continuous innovation and improvement. Certification may also serve as a catalyst for your vendors and suppliers to improve their social and environmental impacts, and provides another way for you to engage customers and employees.

Rhino Foods created a detailed Continuous Improvement tracking document and standardized processes to more closely monitor the company's business goals and their path to B Corp re-certification.

They repeat the BIA annually, review their progress, and set yearly goals accordingly. As an added benefit, they have found that the BIA helps employees become familiar with company operations and gain insight into company goals very quickly. See Toolkit Item 5: Continuous Improvement Tracking Sample.

Start your re-certification project a year early. This will give you time to implement new practices to raise your score. Work with your B Lab contacts to determine your re-certification timeline and aim to submit your assessment three months before it's due.

USE THE BIA TO SET IMPLEMENTATION GOALS

Eileen Fisher's B Team picked a single BIA metric for each business unit to pursue. The ideas were presented to executive leaders to get buy-in. Once approved, the B Team created a Challenge Statement for each business unit to determine the viability of the goal and create an action plan to implement the improvements.

"I think [becoming a B Corp] really solidified our core set of values. Regardless of what else might be happening, these values are something the company is committed to holding onto no matter what."

Catherine Queen, Manager of Sustainable Development & B Corp, Danone

JOIN B LAB'S INCLUSIVE ECONOMY CHALLENGE

Meaningful change doesn't occur all at once. It happens day by day, with concrete, incremental changes adding up to a transformative shift. An inclusive economy is one that creates opportunities for people of all backgrounds and experiences to live with dignity, support themselves and their families, and make a contribution to their communities. The Inclusive Economy Challenge is a call to action for the community of Certified B Corporations to improve our collective impact.

Happy Family found participation in the Inclusive Economy Challenge especially eye-opening. Using this framework, they chose three metrics related to diversity and inclusion to improve upon within the year. This dedicated work has helped them move toward "radical inclusion."

"The assessment created a great framework for us to think of how we can shift our culture."

Rebecca Gildiner, Impact Strategy Manager, Sir Kensington's

COMPLETE THE B CORP LEGAL REQUIREMENT

Continue to educate your legal and executive teams on completing the B Cop Legal Requirement, and take steps to complete the requirement over the course of the Certification Term.

CONTINUE TELLING YOUR B CORP STORY

Join Marketing campaigns such as Vote Every Day to elevate your B Corp story and build brand awareness for the movement. Just as with employees, For maximum impact with your customers, it's best to communicate early and often about your B Corp certification.

Conclusion

LEAD THE MOVEMENT TO MAKE BUSINESS A FORCE FOR GOOD

All the companies interviewed for this guide benefited from the B Corp Certification process and wholeheartedly recommended the experience. Many felt the process helped them build better companies with more engaged employees; it also made them aware of new ways their companies can have a greater social and environmental impact to maximize thier ability to be "a force for good" in the world.

"We work hard to keep our Rhino brand at the center of all this, so rather than trying to be a better B Corp, we leverage our certification to help us be a better Rhino."

Rooney Castle, Program Manager, Rhino

There's no question the certification process is rigorous, and at times even onerous, but across the board, companies agreed that the rigor is what made the process worthwhile and allowed them to feel proud of their accomplishment.

In addition to becoming a B Corp, the certification process helps B Team members gain a more holistic view of their organizations, paving the way for more collaborative and inspired work. The BIA serves as an excellent tool for breaking down silos, fostering innovation and constructing a roadmap for continuous improvement. Some companies also develop stronger relationships outside the organization with vendors and suppliers because of the certification process.

Finally, many B Corps noted how gratifying it is to serve as a leader in the movement to make business a force for good.