

# Carbon Reduction Evidence Checklist for SMEs

Carbon and contract readiness for customer requests, tenders and reporting.

Use this checklist if a customer, procurement team, lender or reporting platform has asked your business for carbon or sustainability evidence. It will help you identify what you already have, what is missing, and what to do next.

Customer requests	Tender evidence	Reporting readiness
Prepare for supplier questionnaires, onboarding forms, and contract renewals.	Get ready for carbon reduction questions in bids and procurement reviews.	Build the basic evidence needed for Scope 1, Scope 2 and supply chain questions.

## How to use it

Tick the items you can confidently evidence today. Circle anything that needs an owner, a deadline or supporting documents. If you are unsure what a customer is asking for, keep the request and work backwards from the wording.

## 1. Understand the request

Clarify what has been asked for before creating new documents.

- We know who has asked for the evidence and why. *Customer, tender, lender, platform or regulator.*
- We know the deadline, format and submission route. *For example: portal upload, questionnaire, PDF, or email response.*
- We have saved the original wording of the request. *This avoids over-answering or missing specific requirements.*
- Someone in the business owns the response. *Name the person responsible for gathering and approving evidence.*

## 2. Gather the evidence you already hold

Most SMEs already have useful data in bills, accounts, and supplier records.

- 12 months of electricity and gas bills are available.
- Fuel, vehicle or mileage records are available.
- Business travel records can be found. *Include rail, flights, hotels, or mileage if relevant.*
- Waste, recycling or packaging information is available.
- Supplier, subcontractor or logistics details are available. *Useful for basic Scope 3 and supply chain questions.*

### 3. Prepare your carbon starting point

Create a simple, explainable position before customers ask for more detail.

- We can estimate Scope 1 emissions. *Direct fuel use such as gas, diesel or company vehicles.*
- We can estimate Scope 2 emissions. *Purchased electricity, heating, or cooling.*
- We understand our main Scope 3 areas. *Suppliers, waste, travel, logistics, and purchased goods or services.*
- We know the period covered by our data. *For example, the financial year or calendar year.*
- We can explain the method or calculator used. *Keep a note of assumptions and data gaps.*

### 4. Check your documents and commitments

Customers usually want evidence, not just intentions.

- We have an environmental or sustainability policy. *Even a short, current policy is better than nothing.*
- We have listed completed reduction actions. *Examples: LED lighting, lower travel, efficient equipment, or renewable electricity.*
- We have named future reduction actions. *Include practical next steps, not vague promises.*
- We have a carbon reduction statement or target. *Make sure it is approved and realistic.*
- We know whether we need a Carbon Reduction Plan. *Especially for public sector work, NHS supply chains, or larger customer requests.*

### 5. Build a customer-ready evidence pack

Make it easy to respond quickly and consistently.

- Evidence is stored in one place. *Use a shared folder with clear file names and dates.*
- The latest version is easy to identify.
- The response is written in plain English. *Avoid overclaiming or unsupported sustainability language.*
- Senior leadership has reviewed or approved the response.
- We can update the evidence each year using the same method.

## 6. Decide your next action

Turn the checklist into a plan.

- We have identified the biggest gaps. *Data, policy, carbon footprint, CRP, or ownership.*
- Each gap has an owner and a deadline.
- We know which gaps could affect a live contract or tender.
- We have agreed the first practical action. *For example: gather bills, calculate Scope 1 and 2, draft a CRP.*
- We know when to ask for help. *A specialist can help turn rough data into a credible response.*

### Your readiness score

0-10 ticks: start by gathering evidence. 11-20 ticks: build a simple evidence pack. 21+ ticks: refine your response, close gaps and consider a Carbon Reduction Plan if contracts or customers require one.

<b>Top gap to close</b>	
<b>Owner</b>	
<b>Target date</b>	
<b>First action</b>	

## Useful links and examples

Use these when building a customer-ready response or Carbon Reduction Plan.

- [The Green Accountants - Sustainability and Impact Reports](#)
- [The Green Accountants - Services](#)
- [Greenhouse Gas Protocol - Corporate Standard](#)
- [UK Government - PPN 006: Carbon Reduction Plans](#)

### Need help responding to a customer or tender?

The Green Accountants can help you turn your data into clear sustainability evidence, carbon footprint

calculations, supplier questionnaire responses, and Carbon Reduction Plans.

[Contact The Green Accountants](#)