



Qlik® Consulting Services Product Terms

These Consulting Services Product Terms (“Consulting Product Terms”) provide a description of Qlik services provided with the Consulting Services product offerings below. These Consulting Services product offerings are governed by these Consulting Product Terms as well as any existing services agreement between Qlik and the Customer which governs the provision of consulting services, or if none, the Consulting and Education Services Terms at www.qlik.com/legal-agreements (“Services Agreement”). In the event of any conflict between the Services Agreement and these Consulting Product Terms, these Consulting Product Terms will prevail.

A. Consulting Services Subscriptions

1. General

1.1 Designated Customer Contacts

- a. Customer shall appoint individual(s) who are authorized and responsible for communicating with Qlik regarding Customer’s consumption of the Consulting Services subscriptions (including but not limited to, scheduling matters and/or the redemption of any Qlik Credits) (each such individual, a “Designated Customer Contact”). Designated Customer Contacts may be specified in an Order Form or otherwise in writing from Customer to Qlik. By appointing a Designated Customer Contact, Customer represents and warrants that each Designated Customer Contact is authorized to make such decisions and act on Customer’s behalf and that Qlik may rely on the written communications of a Designated Customer Contact in its performance hereunder. Customer may change its Designated Customer Contact at any time upon written notice to Customer’s assigned Qlik Consultant.

2. Signature Services

Signature Services are subscription services designed to empower Customer with expert guidance, outcome-based services, and strategic advisory expertise delivered by Qlik consultants. Signature Elite and Signature Success are described in the table and sections below.

	Signature Elite	Signature Success
Customer Success Manager	Included	Included
Customer Success Engineer	Included	Included
Customer Success Plan	Included	Included
Advanced Support	Included	Included
Qlik Learning	Unlimited Users	Unlimited Users
Qlik Credits	1,000	350

2.1 Customer Success Manager

- a. Signature Customers will be assigned a Customer Success Manager (“CSM”). A CSM refers to a Qlik resource who works proactively with Customer as a business advocate and acts as the first point of contact with Qlik. The CSM will be available during local business hours and is responsible for managing a select number of key strategic Customer accounts during the subscription period.
- b. CSM activities may include the following:
 - Facilitate Kickoff Call to introduce roles, Service Level Agreements, and understand Customer’s business objectives
 - Build and maintain an executive level Customer Success Plan (“CSP”) directly tied to ROI, KPIs, and enterprise initiatives
 - Recommend curated Qlik Learning paths, and workshops, tailored to customer’s team’s skillset
 - Help Customer define adoption milestones
 - Schedule regular cadence calls to maintain consistent alignment to customer’s priorities and adjust the CSP accordingly
 - Align credit consumption plan with CSP objectives
 - Monitor usage telemetry and adoption metrics, providing recommendations to accelerate adoption
 - Conduct business reviews with Qlik experts to ensure the deployment follows best practices and identify future needs before they impact business operations
 - Help connect the right stakeholders between customer’s team and Qlik to accelerate onboarding

- Be a first point of contact to engage with other Qlik teams to ensure that any issues that might arise are managed to a successful resolution
- Establish program coordination to identify and highlight the various business project/workstream dependencies in the CSP including:
 - Facilitate of Qlik Consulting Services engagements– connect the Customer and Qlik Consulting, managing the Qlik Credit redemption process
 - Regular check-ins on Consulting Services progress and outcomes
 - Coordinate and assist CSE with activities, e.g. workshops, product demos, roadmap, etc.
 - Education and enablement assistance – persona mapping, assist developing learning paths and credits for instructor-led training.

Signature Elite may include the following additional CSM Activities:

- Align the CSP to transformation programs such as AI, data governance, and enterprise data strategy
- Quarterly executive business reviews with C-level sponsors
- Oversee Business Critical Projects and ensure resourcing for them
- Drive continuous value realization by capturing measurable transformation outcomes across business units
- Coordinating the delivery of Advisory Services leveraging Qlik Credits

2.2 **Customer Success Engineer¹**

- Signature Customers will be assigned a Customer Success Engineer (“CSE”). A CSE is a technical advocate who works proactively with Customer to understand Customer’s technical objectives and incorporates recommended activities into the CSP. The CSE also engages reactively to help Customer overcome critical technical issues. The CSE delivers a combination of foundational and credit-based activities. These activities may include the following:
 - Technical deployment check - High-level assessment to understand and document customer environment. Provides prioritized recommendations to Customer in the CSP.
 - Periodic adoption reviews - Periodic reviews to assess license and feature utilization, providing recommended opportunities/activities for further adoption and value creation.
 - Technical product “how to” workshops, best practice sessions, and technical assessments using available Qlik Credits
 - Critical issue technical collaboration including:
 - Monitoring severity one cases during working hours, and engage when needed with the Customer and Qlik Support to help communication, mutual understanding, and to optimize resolution time
 - Provide guidance to Customer when struggling to diagnose or isolate an issue relating to a Qlik platform, or to help clarify and guide on suggested remediation actions.

- Qlik Credits.** Signature Services include Qlik Credits that the Customer may redeem in order to meet the objectives outlined in Customer’s CSP. Any unused Qlik Credits at the remainder of each year shall expire and be forfeited. Unused Credits may not be rolled forward into subsequent annual periods (within a multi-year subscription) or into any renewal period of Signature Services.

- Advanced Support.** Signature Services include an Advanced Support subscription as further described in the Advanced Support section below.

- Education Services.** During the Subscription period, Customer will be provided full access to a Qlik Learning subscription for an unlimited number of named employees.

3. **Advanced Support**

Advanced Support is an enhanced Service that extends support to provide advanced troubleshooting, assistance, and enablement, tailored to Customer’s environment. Advanced Support allows Qlik to maintain awareness of the Customer’s business-critical projects and platform evolution, enabling the delivery of informed, customized support when engaged for issue resolution, strategic guidance, or knowledge sharing. Advanced Support does not guarantee resolution of issues, nor does it replace formal training, certification, or comprehensive audits, which fall outside the scope of Advanced Support. Advanced Support provides coverage for the Qlik Products stated on the Order Form in which Advanced Support is purchased. In addition to any Enterprise Support provided to Customer pursuant to the Qlik Support Policy or Service Level Agreement, Advanced Support includes the additional benefits set forth below.

3.1 **Customer Contacts.**

- Certified Technical Contact.** In addition to Designated Customer Contacts, Customer shall designate up to six (6) individual(s) who are knowledgeable about the Customer’s Qlik Products to engage with Qlik Advanced Support (each such individual, a “Certified Technical Contact”). Certified Technical Contacts must complete Advanced Support on-boarding as described in Section 3 below. Customer Certified Technical Contacts will receive invitations for Advanced Support Proactive sessions and will get priority access for Advanced Support Remediation Assistance. Throughout the contract period, Certified Technical Contacts are encouraged to follow training and learning recommendations provided by Advanced Support to ensure optimal utility of Advanced Support.
- Designated Customer Contacts and Certified Technical Contacts (together, “Customer Contacts”) may be specified in an Order Form, support ticket, or otherwise in writing from Customer to Qlik. For avoidance of doubt, a Designated Customer Contact and Certified Technical Contact may be the same individual.

3.2 **Business Critical Projects.**

- Customer may select up to three (3) business critical projects at any point during the subscription period (each a “Business Critical Project”). Qlik will stay current on Business Critical Projects through information provided by Certified Technical

¹ For the Product Description for legacy Signature Success and Signature Customer Success Engineer, please see the archived Consulting Services Product Terms at <https://www.qlik.com/us/legal/product-terms/archived-product-terms>

Contacts and provide commercially reasonable remediation assistance on Business Critical Projects through the subscription period. Any issues or projects outside of Business Critical Projects shall be provided Enterprise Level Support.

- b. Business Critical Projects shall include (i) active implementation and/or development work to deliver a technology solution aligned to a specific technical or business objective or (ii) a live production use case aligned to a critical process or business objective.
- c. Selection of Business Critical Projects shall take place during the onboarding session or periodic check-ins. Each Business Critical Project shall be in scope for a minimum period of three (3) months. Any changes to the scope or selection of Business-Critical Projects must be communicated to Qlik by a Designated Customer Contact.

3.3 On-Boarding and Check-In Sessions.

- a. **On-Boarding.** Qlik shall conduct on-boarding session(s) with Customer Contact(s) to kick-off the Advanced Support engagement. During these session(s), Qlik may request information on Qlik technical expertise, ongoing Business Critical Projects, and/or conduct a technical deployment check to understand the Customer's environment and make high-level recommendations. A successful technical deployment check may require access to install/run automation on Customer's systems.
- b. **Check-In Sessions.** Qlik may initiate periodic check-in session with Contact(s) to review Business Critical Projects and education activities. Unless otherwise agreed by the parties, each check-in session will occur in three (3) month intervals. If recommended by Qlik, check-in sessions may also include technical deployment check-ins.
- c. **Technical Deployment Check-Ins.** Advanced Support will initiate a technical deployment check-in session based on activity observed of the identified platforms, and at minimum once every twelve (12) months following the latest check-in. These sessions are intended to reflect operational observations and provide contextual guidance. They do not replace or constitute a comprehensive consultative audit or formal assessment of the Customer's environment.

3.4 Extended Case Remediation Assistance

- a. **Priority Access.** When contacting Support, Qlik will use commercially reasonable efforts to prioritize Advanced Support Customer cases over those of other Customers raising the same level of severity and respond within 15-minutes to Severity 1 Errors reported by Customer Contacts. Severity levels are defined in the Support Policy or Service Level Agreement, as applicable and available at <https://www.qlik.com/us/legal/product-terms>. Customer Contacts will have priority access to senior technical subject matter experts ("SME(s)") to assist in case resolution.
- b. **Extended Case Remediation.** If assistance beyond Enterprise Level Support is required, Qlik shall provide extended Support case remediation to at least one (1) Certified Technical Contact which shall include extended technical assistance and contextual guidance to facilitate issue analysis and support accelerated resolution timelines where commercially reasonable. Extended case remediation sessions are limited to four (4) hours in duration per support ticket and scheduled based on Qlik's availability. Extended case remediation does not constitute a guarantee a resolution of all issues, to develop real-time patches, or serve as a substitute for a formal consulting engagement, should such a need be identified by Advanced Support. Advanced Support Remediation sessions may include:
 - Extended guidance and advice regarding Qlik supported configurations within the customer ecosystem
 - Advanced troubleshooting of Qlik solutions, which, where applicable, may also include limited guidance on third-party technologies that form part of the ecosystem in which Qlik solutions operate
 - Guidance during test rehearsal of patch installation or customized work-around
- c. **Fast-track Escalation.** In response to a critical situation, Qlik may provide fast-track escalation for technical issues involving Business Critical Projects that substantially disrupt Customer's business operations and/or result in a significant business impact. Fast-track escalation may include:
 - Prioritization of Qlik internal resources to accelerate resolution
 - An assigned escalation manager to coordinate resolution and communication efforts
 - Retroactive check-in sessions to provide further recommendations and guidance following escalation closure

3.5 Education Services. During the Subscription period, Customer will be provided full access to a Qlik Learning subscription for an unlimited number of named employees.

4. **Qlik Credits.**

- 4.1 Qlik Credits ("Credits") are consumable services credits that the Customer may redeem for consulting, advisory, and training services in the country of purchase solely from the selection of offerings available in the catalog at www.qlik.com/signatureservicescatalog (the "Qlik Credit Catalog"). Any unused Credits at the remainder of each year shall expire and be forfeited and may not be rolled forward into subsequent annual periods (within a multi-year subscription) or into any renewal period of the Qlik Credits. The Qlik Credit Catalog is subject to change from time to time in Qlik's reasonable discretion.
- 4.2 To redeem Credits for Services from the Qlik Credit Catalog, the Qlik consultant will provide Customer with a Customer Redemption Certificate (CRC) including the name of the specific offering from the Qlik Credit Catalog being purchased, the number of credits expected to be consumed, and any travel expenses. Upon submission of the CRC to a Designated Customer Contact, Customer shall have seven (7) days to reject the CRC before Credits are redeemed. For the avoidance of doubt, an SOW shall not be required to consume the Qlik Credits.

5. **Qlik Platform Services ("QPS")**

Qlik Platform Services are proactive, expert-led managed services. Qlik Platform Services are available in Standard, Premium and Enterprise editions for Qlik Data Analytics Products and Qlik Data Integration Products as summarized below.

5.1 Qlik Platform Services- Analytics Editions

QPS are available for Qlik Analytics Products including QlikView, Qlik Sense on Windows, and Qlik Cloud Analytics. The deployment location of QPS is limited to the customer's on-premises environment or customer owned and managed cloud (AWS, Azure, etc.) and/or Qlik Sense Enterprise SaaS.

		Standard	Premium	Enterprise
Service Response Levels	Non-Critical Issue/Request Response Time (Business Hours)	2 Hours	2 Hours	2 Hours
	Critical Issue Response Time (Business Hours)	30 Minutes	30 Minutes	30 Minutes
	Critical Issue Response Time (Monday- Friday, Non-Business Hours)	Not Included	30 Minutes	30 Minutes
Environment Entitlements	Servers (QlikView, Qlik Sense)	10	15	25
	Cloud Gateways	2	5	8
	Production Applications	60	150	300
“Critical Issue” means that the Qlik Platform is inoperable or not accessible in a production environment or the Qlik Platform is down or not available due to a Qlik Platform configuration failure, excluding any (i) underlying host OS/platform, scheduled maintenance and/or upgrades, or (ii) any event beyond the reasonable control of Qlik, including but not limited to any interruption of power, telecommunications or Internet connectivity, and any failure of Customer's internal telecommunications equipment, browser or network configurations, hardware and/or third party software. “Non-Critical Issue” means any issue that is not a Critical Incident. “Standard Business Hours” mean from 10:00 to 19:00 IST (10:00 am to 7:00 pm) Monday to Friday (excluding national and bank holidays), unless otherwise agreed in writing between a Designated Customer Contact and a Qlik Consultant. “Production Applications” means user facing dashboards (does not include ETLs).				

	Onboarding Activities (One Time)	Delivery Activities (Recurring)	Ad-Hoc Incident & Service Request Activities
Activity	Install or review Qlik environment for QPS	Daily:	Start/restart services π
	Install QPS administration Tools	Comprehensive review of system log monitors	Create/test security rule π
	Document Qlik environment	Verification of data reload tasks	Investigate security rule issue *
	Configuration Management DB data entry: system assets, environment, settings, etc.	QMC review: node health, etc.	Create streams/spaces
	Review and create incident tickets for Active QPS related support tickets with Qlik Support	Monthly:	Add data connection
	Score and review applications	Governed application migration process *+	Investigate data connection issue *
	Configuration Management DB data entry: Data sources, Performance Score, etc.	Review data exports	Create new reload task
	Provide customer information to access/use QPS customer portal and ticket submission process	Review disk space	Investigate reload task failure/issue
	Install or review Qlik environment for QPS	Optimize reload batch window	Run reload task *
		Quarterly:	Single sign-on system / access issue *
		Analyze and document security rules	Add custom property π
		Audit user access/license usage	License allocation

		Identify unused items such as tasks, data connections, streams, etc.	
		Analyze and curate extensions	
		Archive old logs	
		QVD usage and optimization analysis	
		Review and document pinning/load balancing	
		Verify customer backups and/or QPS Qlik required file backups	
		Quarterly Business Review (QBR) with Customer	
		Annually:	
		Plan disaster recovery	
		Plan/review upgrade strategy π	
		Review architecture/capacity plan	
		Qlik system upgrade *π	
		Practice file recovery process	
		Simulate production disaster recovery	

*Monthly volume of task execution is governed by the QPS Edition. If volume of task execution exceeds maximum value for QPS Edition, Customer will have the option to upgrade QPS Edition or modify operation to adhere to QPS Edition.

πQlik Sense/View Enterprise on Windows only. These features are not currently available on the SaaS Platform.

5.2 Qlik Platform Services- Data Integration Editions

QPS are available for Qlik Data Integration Products including Qlik Talend Cloud, Qlik Cloud Data Integration, Qlik Data Integration (excluding Qlik Compose), and Talend Cloud and Software. QPS deployment location is limited to the customer's on-premises environment or customer owned and managed cloud (AWS, Azure, etc.).

		Standard	Premium	Enterprise
Service Response Levels	Non-Critical Issue/Request Response Time (Business Hours)	1 Hour	1 Hour	1 Hour
	Critical Issue Response Time (Business Hours)	30 Minutes	30 Minutes	30 Minutes
	Critical Issue Response Time (Monday-Sunday, Non-Business Hours)	30 Minutes	30 Minutes	30 Minutes
Environment Entitlements	Servers (QlikView, Qlik Sense)	10	15	25
	Cloud Gateways	2	5	8
	Production Tasks/Jobs	100	300	500

“**Critical Issue**” means that the Qlik Platform is inoperable or not accessible in a production environment or the Qlik Platform is down or not available due to a Qlik Platform configuration failure, excluding any (i) underlying host OS/platform, scheduled maintenance and/or upgrades, or (ii) any event beyond the reasonable control of Qlik, including but not limited to any interruption of power, telecommunications or Internet connectivity, and any failure of Customer's internal telecommunications equipment, browser or network configurations, hardware and/or third party software.

“**Non-Critical Issue**” means any issue that is not a Critical Issue.

		Standard	Premium	Enterprise
“Standard Business Hours” mean from 10:00 to 19:00 IST (10:00 am to 7:00 pm) Monday to Friday (excluding national and bank holidays), unless otherwise agreed in writing between the Designated Customer Contact and the Qlik Consultant.				

	Onboarding Activities (One Time)	Delivery Activities (Recurring)	Ad-Hoc Incident & Service Request Activities
Activity	Install or review Qlik environment for QPS	Daily:	Start/Restart Services
	Install QPS administration Tools	Comprehensive review of Enterprise Data Manager Analytics Dashboard	Create/update Notifications
	Document Qlik environment	Review Errors Logs	Coordinate Endpoint Issue (Identify and submit ticket)
	Configuration Management DB data entry: system assets, environment, settings, etc.	System review: node health, etc.	Coordinate Data Latency Issue (Identify Origin and Notify)
	Review and create incident tickets for Active QPS related support tickets with Qlik Support	Monthly:	License Allocation
	Configuration Management DB data entry: Data sources, Performance Score, etc.	Review Trends with Enterprise Data Manager Analytics Dashboard	Task Migration Process*
	Provide customer information to access/use QPS customer portal and ticket submission process	Verify Log clearing/rotation processes functioning	Review and Coordinate to Notifications
	Install or review Qlik environment for QPS	Audit Permissions with Customer representative	General Inquiry
	Install QPS administration Tools	Log into DR Environment	Start/Restart Services
	Document Qlik environment	Quarterly:	Create/update Notifications
	Configuration Management DB data entry: system assets, environment, settings, etc.	Analyze Trends and provide reporting	Coordinate Endpoint Issue (Identify and submit ticket)
		Audit User Access	Coordinate Data Latency Issue (Identify Origin and Notify)
		Review and cleanup Notifications	
		Review and cleanup Tasks	
		Verify Log processes	
		Verify Customer Backups	
		Prepare QBR Report for Review or Send to Customer	
		QBR with Customer	
		Analyze Trends and provide reporting	
		Annually:	
		Plan disaster recovery	
		Plan/review upgrade strategy	
		Review architecture/capacity plan	
		Qlik system upgrade	
		Practice file recovery process	
		Simulate production disaster recovery	

* Monthly volume of task execution is governed by the selected QPS Edition. If volume of task execution exceeds maximum value for service tier, customer will have the option to upgrade QPS edition or modify operation to adhere to edition limits.

5.3 **Service Response Levels.**

- a. **Service Response Levels.** Qlik will use commercially reasonable efforts to respond within the Service Response Levels applicable to Customer's selected QPS Edition set forth above. Initial Response Time is defined as the period commencing when an incident is first reported by Designated Customer Contact via the QPS Customer Portal or by email to the QPS support email (qms_servicedesk@qlik.com), and ending when a member of the Qlik team logs the report and responds to the Designated Customer Contact by email or through the QPS Customer Portal (<https://qlikqps.haloitsm.com/portal>). The Service Response Level period accrues time only during "business hours" or periods covered by entitlement inclusions/enhancements.
- b. **Issue Resolution.** A Critical or Non-Critical Issue is considered to be resolved upon the earlier to occur of the following: (i) Qlik and Customer mutually agree in writing that the issue or problem is resolved; (ii) a technical work-around solution is provided and is reasonable in Qlik's discretion; (iii) Customer closes or requests that Qlik close the Issue; or (iv) the case assigned to the Issue has been left open by the Customer for ten (10) consecutive business days, during which period Qlik has not received a response from any of Designated Customer Contacts.
- c. **Exclusions.** Qlik will have no obligation to provide any QPS Issue troubleshooting or resolution in connection with: (i) any issue or problem that Qlik determines is not due to any issue, error or deficiency in the Qlik Products (including without limitation, issues or problems caused by stand-alone third party software products used in conjunction with the Qlik Product, the Internet or other communications, Customer network or browser matters, or login issues); (i) use of the Qlik Product other than in accordance with the Documentation and the Agreement; (ii) any issues, errors or problems with the applicable Qlik Product that are not reproducible; (iii) any issue, error or problem that is reported by Customer via any mechanism other than the QPS Customer Portal or QPS Support email; or (iv) any issues, errors or problems with the Qlik Products that result from: (a) the use of the Qlik Products with software or hardware not designed for use with the operating systems approved by Qlik in the Documentation; (b) the use of the Qlik Products with hardware that does not satisfy the minimum system requirements specified by Qlik in the Documentation; (c) changes, modifications, or alterations to the Qlik Products not approved in writing by Qlik or its authorized representatives (d) use of the Qlik Products with third party operating systems, databases, data sources, network software and client applications that are no longer supported by the related product vendors, or (e) use of other than a Supported Version of the Software as defined in the applicable Release Management Policy. If Qlik does correct any of the issues or errors described in subsections (a)-(e) above, or otherwise provides support for the Qlik Platform or a Qlik Product that is not covered by the terms and conditions contained in this Policy, such issue or error resolution or support will be provided only following Customer's written request and approval of all charges, and Customer will be invoiced for such support at Qlik's then-current "time and materials" rates for such services. Without limiting any of the foregoing, Qlik has no obligation to provide support for any third-party software, data, or other materials distributed or bundled with a Qlik Product.

B. One-Time Consulting Services

1. Prepaid Consulting Services

- 1.1 Prepaid Consulting Services are consulting services that are paid in advance by Customer and include the number of eight (8) hour calendar days set forth in an Order Form or SOW. Prepaid Consulting Services activities may include assistance with configuration or implementation of Qlik Products. Prepaid Consulting Services days may only be performed in half (4-hour) or full (8-hour) day increments. Prepaid Consulting Services rates are calculated based on the currency and location in which they are purchased. Prepaid Consulting Services days shall expire twelve (12) months from the date of purchase. No refunds or credits shall be provided for expired Prepaid Consulting Services.

2. Critical Consulting Services

- 2.1 Critical Consulting Services are consulting services that are purchased online by Customer and include five (5) days of Critical Consulting Services which are performed remotely within the country of purchase. Each Critical Consulting Services day includes eight (8) hours of critical consulting and may only be performed in full (8-hour) increments. Critical Consulting Services rates are calculated based on the currency and location in which they are purchased. Critical Consulting Services days shall expire thirty (30) days from the date of purchase. No refunds or credits shall be provided for expired Critical Consulting Services.

3. Advisory Services

Advisory Services are consulting services that provide expert executive management guidance on data management, governance and AI strategies. Advisory Services are available for purchase standalone or through the redemption of Qlik Credits.

- 3.1 **Business Adoption Workshop.** The Business Advisory Workshop is a business use case analysis and prioritization workshop that includes the following activities:

- **Understanding Key Business Drivers and Data Challenges:** Qlik will conduct an analysis leveraging our Data and AI Framework to identify the primary factors influencing Customer's business objectives, as well as the data-related challenges that may be hindering progress. This understanding will provide a clear picture of the obstacles Customers face and the opportunities for improvement.
- **Identifying and Prioritizing Use Cases for Pilot Projects:** Based on our findings, Qlik will work collaboratively to pinpoint specific use cases that can serve as a pilot project. These use cases will be prioritized according to their potential impact and alignment with Customer's strategic goals, ensuring that we focus on initiatives that deliver the most value. The objective of this exercise is to identify and prioritize the selected high-value use case for deeper analysis and discovery while developing a roadmap for additional use cases. The selected use case will be scoped according to our agile methodology which focuses on speed to value.
- **Aligning Software and Services Considerations with Business Priorities:** Qlik will ensure that any software and service recommendations are directly aligned with your business priorities. This alignment will help to create a cohesive strategy that maximizes the effectiveness of your investments and supports your overall objectives.

3.2 Data Governance Assessment. The Data Governance Assessment is a data governance use case analysis and prioritization workshop that includes the following activities:

- Understanding Key DG Challenges: Qlik will conduct an analysis leveraging our Data and AI Framework to identify the primary factors influencing Customer's business objectives, as well as the data-related challenges that may be hindering progress. This understanding will provide a clear picture of the obstacles you face and the opportunities for improvement.
- Identifying and Prioritizing DG Use Cases for DG Pilot Projects: Based on our findings, we will work collaboratively to pinpoint specific use cases that can serve as a pilot project. These use cases will be prioritized according to their potential impact and alignment with your strategic goals, ensuring that we focus on initiatives that deliver the most value. The objective of this exercise is to identify and prioritize the selected high-value use case for deeper analysis and discovery while developing a roadmap for additional use cases. The selected use case will be scoped according to our agile methodology which focuses on speed to value.
- Aligning Software and Services Considerations with Business Priorities: We will ensure that any software and service recommendations are directly aligned with your business priorities. This alignment will help to create a cohesive strategy that maximizes the effectiveness of your investments and supports your overall objectives.

3.3 Organization & Operating Model Design Workshop. The Organization & Operating Model Design Workshop focuses on the design phase of a customer's operating model and includes the following activities:

- Qlik will empower the customer with the necessary skills and resources to fully utilize the product capabilities, driving value and innovation
- Skills Assessment:
 - Conduct an evaluation of current team capabilities as aligned to the capabilities being enabled
 - Identify specific skill gaps related to new tools and processes
- Role Definition:
 - Clearly articulate roles and responsibilities aligned with the new operating model
 - Utilize team strengths to optimize workforce efficiency
- Operating Model:
 - Create a structured framework for collaboration and accountability based on known industry patterns for AI and Data Governance Operating Models
- Performance Metrics and Accountability:
 - Define success Metrics and establish clear, measurable performance indicators

3.4 Change Management Design Workshop. The Change Management Design Workshop emphasizes the need for communications as a central component to enablement. Qlik uses a communications framework that identifies each of the elements of a communications strategy, along with the most common options for these elements and includes the following activities:

- Hands-on workshop for the selected focus area (AI or Data or Data Governance): Facilitate hands-on workshop where Customer team members go through the elements of the communications strategy and select/deselect the options that apply to the business and technical environments
- Identify the resource needs for communications and the corporate functions within the business that either must be involved, or which can assist with communications
- Identifying the metrics for measuring the success of communications

3.5 Change Management Enablement. Change management Enablement provides access to a Qlik Advisor to facilitate and support the communications strategy rollout defined in the Change Management Design Workshop including the following activities:

- Hands-On Workshops to address resourcing needs and define the remaining requirements
- Communications Internal Setup:
 - Assistance in roll-out of the communications within the model defined in the Organization & Operating Model Design Workshop.
 - External alignment plan on communications for the next 12 months (by quarter)
- Identifying reporting on the success of metrics & communications

4. Starter Services

Starter Services are one-time Consulting Services that support Customers in the deployment of or migration to a Qlik Product that is new to the Customer. Qlik Starter Services include implementation and enablement for the following Qlik Products as further described below:

4.1 Deployment Starter Services. The Deployment Starter Service is a 4-part engagement. It can be leveraged as separate sessions, but Qlik recommends that it's consumed as a holistic engagement. The Deployment Starter is intended to enable customers to replicate a simple subset of data from a few sources to a single target. The 4 components of the Deployment Starter Service are as follows:

4.1.1 Data Move Starter Service – The Data Move Starter Service is intended to provide customers with enablement and implementation expertise to deploy up to 2 data gateways and provide an understanding of the product, its capabilities and uncover any limitations. This will also allow for building other downstream starter services

- Prerequisites for Qlik Data Move Starter Service:
 - Qlik will perform a remote "pre-assessment" prior to beginning implementation. All prerequisites for the pre-assessment must be met prior to commencing work.
 - Access to systems is either granted to Qlik Consultants or an employee that will issue commands and configure systems has been made available to the Qlik Consultants
 - Tenant has already been acquired by the customer

- The source and target endpoint requirements and pre-requisites have been reviewed by the endpoint administrators and have been implemented
- The System housing the target endpoint requirements and pre-requisites have been reviewed by the endpoint administrators and have been implemented
- Customer and Qlik have confirmed any engagement dependencies required to begin the project and work with the stakeholders to determine a starting date for the engagement
- Customer has confirmed necessary equipment, resources and personnel are available throughout the engagement.
- An agreed upon engagement schedule
- Downloads of relevant software install packages have been completed
- Required product licenses are available
- Customer has provided the hardware and software in support of the ingestion and replication processes as well as access to the source control repository (i.e. GIT)
- All dependent technology versions must be supported by Qlik, such as source code, SDLC (Software Development Life Cycle), Java, and any 3rd party libraries
- The Service includes the following:
 - Requirements Review
 - Architecture suggestion / template based on requirements and current state
 - Installation of 2 data gateways (Dev and UAT)
 - Up to 7 Replication or Pipeline (until Storage) tasks
 - Up to 3 sources and 1 target
 - The lesser of up to 1TB total full load or 100 tables
 - Task monitors for 2 different scenarios
 - Notifications (5 for users or user groups)

4.1.2 3rd Party Transformation Starter Service - The 3rd Party Transformation Starter Service is intended to provide customers with enablement and implementation expertise to create DataMart's or Lake Houses for downstream consumption (Analytics, AI/ML etc.)

- Prerequisites for the 3rd Party Transformation Starter Service:
 - DataMart Build (Star Schema) or Lake House (no data vault or data warehouse)
 - Pre-req check / validation / connectivity check
 - Dev and UAT only
 - Access to systems is either granted to Qlik Consultants or an employee that will issue commands and configure systems has been made available to the Qlik Consultants
 - Tenant has already been acquired by the customer
 - The System housing the target endpoint requirements and pre-requisites have been reviewed by the endpoint administrators and have been implemented
 - Customer and Qlik have confirmed any engagement dependencies required to begin the project and work with the stakeholders to determine a starting date for the engagement
 - Customer has confirmed necessary equipment, resources and personnel are available throughout the engagement.
 - An agreed upon engagement schedule
 - Downloads of relevant software install packages have been completed
 - Required product licenses are available
 - Customer has provided the hardware and software in support of the ingestion and replication processes as well as access to the source control repository (i.e. GIT)
 - All dependent technology versions must be supported by Qlik, such as source code, SDLC (Software Development Life Cycle), Java, and any 3rd party libraries
- The Service includes the following:
 - Requirements Review
 - Architecture suggestion / template based on requirements and current state
 - Review of Desired model, if existing Consulting team identifies an issue the consulting team will recommend an alternative to better fit the QT
 - 5 Transformations (comprised of either Custom SQL or Transformation flows
 - 3 star models max 3 facts and 10 dimension total

4.1.3 The ETL - Data Transformation Starter Service - The ETL - Data Transformation Starter Service is intended to enable customers to learn how to build ETL transformations using the Qlik Talend Cloud platform through personalized enablement and hands-on learning.

- Prerequisites for the ETL - Data Transformation Starter Service:
 - Agreed upon start date and schedule for the engagement
 - All necessary equipment, resources and personnel are available throughout the engagement.
 - Documentation including a description of the initial data integration use case and associated requirements have been shared with Qlik
 - Downloads of relevant software installation packages have been completed.
 - Required product licenses are available.
 - GIT source code repository configured and available.
 - Customer will provide the hardware and software in support of the ingestion as well as access to the source control repository (i.e. GIT).
 - All dependent technology versions must be supported by Qlik, such as source code, SDLC (Software Development Life Cycle), Java and any 3rd-party libraries.
 - The number of jobs considers master/parent, and sub-jobs. A Master job with 2 sub-jobs counts as 3 jobs. An ETL job is a graphical representation of a business model that connects components to run a data

integration process. Job design translates business needs into code, routines, and programs, which technically implements data flow. Jobs can address all data integration and data service processes, as well as other related processes.

- The Service includes the following:
 - Review customer architecture for up to two (2) non-production environments and use cases.
 - Review customer business needs and document which ETL components will be installed/configured.
 - Review what technologies will be configured for source code and endpoints
 - Facilitate up to two (2) working sessions to align on architecture, non-functional requirements and use case scope to provide hardware sizing recommendations
 - Configuration of one (1) ETL tenant in two (2) environments
 - Configuration of one (1) ETL project in two (2) environments
 - Installation of one (1) instance of ETL job development environment
 - Installation of up to two (2) ETL job execution engines in each environment
 - User setup and authentication integration via Single Sign-On (SSO) within Qlik ETL tenant using a compatible identity provider (no custom-coded integrations) unless mutually agreed in writing.
 - Deployment and integration planning
 - Configuration of up to three (3) ETL jobs to transform data.
 - Orchestration of up to three (3) jobs or tasks to publish and execute the jobs / tasks and corresponding plans
 - Reference architecture diagram
 - Installation / configuration runbook
 - Up to two (2) knowledge transfer working sessions not to exceed four (4) hours combined

4.1.4 The Tenant Creation Starter Service - The Tenant Creation Starter Service provides the installation and configuration of Qlik Software, providing a platform that is ready to support business needs.

- Prerequisites for the Tenant Creation Starter Service:
 - Acquisition of licenses for Qlik Cloud or Qlik Cloud Government.
 - Technical readiness: Reviewed and completed pre-configuration checklist (Provided by Qlik Professional Services, product specific)
 - Customer will provide access to relevant resources (IdP administrator, existing BI administrator, BI developers, database administrator, data architect, etc) as needed through the project
 - Customer will configure IdP, data sources and existing deployments as needed in a timely manner to support implementation
- The Service includes the following:
 - Configuration for up to two (2) tenants
 - System Integrations for data connection
 - Qlik will provide configuration of Customer's Qlik Tenant including user authentication either via the Qlik IdP or to accept a compatible Customer IdP without the use of custom coding Task Configuration and Scheduling
 - Configuration of SMTP
 - Configuration of client user authorization for governing Space access
 - Qlik will also configure standard Monitoring Applications and standard Demonstration Applications and provide basic enablement to a client user on the monitoring of their new Qlik environment
 - Qlik Data Gateway (Direct Access) Configuration and testing of up to fifteen (15) data connections.
 - Reload Task Configuration and Scheduling for Monitoring and Demonstration apps
 - Setup and configuration of tenant administration and operational automations in Qlik Automate (ex. Production deployment application backup)

4.2 Qlik Data Integration Starter Service. Leveraging Industry best practice Qlik will work with the Customer to provide enablement and implementation expertise and solution deployment for either stand-alone Data Streaming (Replicate) or Data Streaming together with Data Warehouse Automation or Data Lake Creation (Compose) in Customer's environment. In addition, Qlik will work to integrate it with existing Customer systems including environment promotion from non-production to production.

Prerequisites for Qlik Data Integration Starter Services:

Qlik will perform a remote "pre-assessment" prior to beginning implementation. All prerequisites for the pre-assessment must be met prior to commencing work.

Services include the following:

- Remote Customer environment pre-assessment
- Synchronizing Data with Qlik Replicate learning for up to 2 attendees
- An architecture review and subsequent development of a best practice design architecture
- Replicate installation (1 non-production server & 1 production server)
- Enterprise Manager installation
- Implementation assistance for the LogStream endpoint is limited to 2 targets
- Replicate configuration:
 - Up to 3 source endpoints, 2 target endpoints
 - Up to 10 transformations limited to timestamps and simple name changes
 - Up to 100 tables/2 TB initial load
 - Apply and store changes
 - Up to 7 tasks
 - Does not include SAP on Db2 (LUW, z/OS) and HANA. These sources can be accommodated but will require the purchase of additional consulting assistance due to the complexity of integration

- Compose configuration (of either):
 - Compose for Data Lakes configuration (Up to 20 calculations, up to 5 storage tasks, data refreshed);
 - Compose for Data Warehouse configuration (Up to 20 calculations, 1 data mart, 3 fact tables, 5 dimensions, 1 Model, 2 projects)
 - Limit of 20 tables for the model
 - RDBMS Sources only (does not include SAP on Db2 (LUW, z/OS, iSeries) and HANA). These sources can be accommodated but will require the purchase of additional consulting assistance due to the complexity of integration
 - Limit scheduler to 2 workflows
 - No non-Replicate sources
- Configuration documentation
- If desired, Qlik will perform a high-level pre-production health-check to help ensure readiness for production deployment
- Up to 6 months access to a CSE per the terms outlined in Signature Success

4.3 Qlik Talend Cloud Starter Service. Leveraging Industry best practices, Qlik will work with the Customer to provide enablement, implementation expertise, and solution deployment for Qlik Talend Cloud.

Prerequisites:

- Customer and Qlik have confirmed any engagement dependencies required to begin the project and work with the stakeholders to determine a starting date for the engagement
- Customer has confirmed necessary equipment, resources and personnel are available throughout the engagement.
- Documentation including a description of the initial data integration use case and associated requirements has been shared with Qlik
- An agreed upon engagement schedule
- Downloads of relevant software install packages have been completed
- Required product licenses are available
- GIT source code repository is configured and available
- Customer has provided the hardware and software in support of the ingestion and replication processes as well as access to the source control repository (i.e. GIT)
- All dependent technology versions must be supported by Qlik, such as source code, SDLC (Software Development Life Cycle), Java, and any 3rd party libraries
- The number of jobs considers master/parent, and sub-jobs. A master job with 2 sub jobs counts as 3 jobs. A Talend job is a graphical representation of a business model that connects components to run a data integration process. Job design translates business needs into code, routines, and programs, which technically implements data flow. Jobs can address all data integration and data service processes, as well as other related processes

Services include the following:

- A Discovery Phase including:
 - Review of customer architecture for up to two (2) non-production environments and use cases
 - Review of customer business needs and document which components of Qlik Talend Cloud will be installed/configured
 - Review of what technologies will be configured for source code and endpoints
 - Facilitation of up to two (2) working sessions to align on architecture, non-functional requirements and use case scope to provide hardware sizing recommendations
- Configuration of up to two (2) non-production environments including:
 - Installation of one (1) Qlik Data Gateway Server in two (2) environments
 - User setup and authentication integration via Single Sign-On (SSO) within Qlik Cloud Tenant using a compatible identity provider (no custom-coded integrations) unless mutually agreed in writing
 - Configuration of one (1) Qlik Talend Cloud Tenant in two (2) environments
 - Configuration of one (1) Talend Project in two (2) environments
 - Installation of one (1) instance of Talend Studio
 - Installation of up to two (2) Talend execution engines in each environment
 - User setup and authentication integration via Single Sign-On (SSO) within Qlik Cloud Tenant using a compatible identity provider (no custom-coded integrations) unless mutually agreed in writing
 - Integration with up to one (1) compatible source control repository (i.e. GIT)
- Data Ingestion and Change Data Capture configurations including:
 - Replication of data from up to three (3) source(s) to one (1) target. Configure up to three (3) replication tasks from up to ten (10) tables
- Data Transformation & Loading Configurations including:
 - Configuration of up to three (3) Talend jobs to transform data
 - Orchestration up to three (3) jobs or tasks to publish execute the jobs / tasks and corresponding plans
- Documentation for knowledge transfer including:
 - Reference architecture diagram
 - Installation / configuration runbook
 - Up to two (2) knowledge transfer working sessions not to exceed 4 hours combined

At the conclusion of this engagement, Customer will have a Qlik Talend Cloud Data Integration environment that may consist of any of the following desired components configured and executing the agreed to ingestion, replication, transformation and loading use cases resulting in:

- An installation runbook and the successful execution of a test process to confirm functionality of the environment installation and configuration; ensuring servers, tenants, workstations, SSO, users, source and target connectivity, source code repository are functional

- A personalized reference architecture diagram
- A functional unit tested process consisting of up to 3 tasks ingesting and / or replicating data from source to target landing zone
- A demonstrated task/plan promotion between environments
- Orchestration of up to three (3) jobs or tasks to publish execute the jobs / tasks and corresponding plans
- Facilitation of up to two (2) knowledge transfer working session(s) to walk through the:
 - Installation / configuration runbook
 - Ingestion and change data capture processes
 - A visual walkthrough of administration assets that are configured for users, groups, roles, and project definitions
 - Transformation and loading processes
 - Job publication to the cloud and orchestration of the published item

4.4 Qlik Data Analytics Starter Service. Leveraging Industry best practices, Qlik will work with the Customer to provide enablement, implementation expertise, and solution deployment for Qlik Data Analytics.

Qlik Data Analytics Starter Services may include the following:

- **Deploy and Administer Qlik Sense SaaS Training** – Attendance by up to two (2) Customer personnel of the Deploy and Administer Qlik Sense SaaS Training
- **Create Visualizations with Qlik Sense Training** – Attendance by up to five (5) Customer personnel of the Create Visualizations with Qlik Sense Training Course
- **Data Modeling for Qlik Sense Training** – Attendance by up to two (2) Customer personnel of the Data Modeling for Qlik Sense Training Course
- **Configuration of Tenant.** Qlik will provide configuration of Customer's Qlik Tenant including user authentication either via the Qlik identity provider or to accept a compatible Customer identity provider without the use of custom coding, configuration of SMTP, and configuration of Customer user authorization for governing Space access. Qlik will also configure standard Monitoring Applications and standard Demonstration Applications and provide basic enablement to a Customer on the monitoring of their new Qlik environment
- **Current State Review.** Qlik will work with the Customer personnel to define a target solution design and high-level migration roadmap with the Customer. Qlik will assist with:
 - A baseline inventory of existing BI applications or reports including relevant data sources and business use-cases. Inventory will include applications and reports associated with up to ten (10) business use-cases to be established and mutually agreed at the outset of the engagement
 - Identify and present opportunities, risks, and recommended mitigations for migration to Qlik Cloud consistent with leading practices
- **Basic Application Development.** Qlik will work with Customer business users to understand their needs and specific application requirements. Based on this work, Qlik will define a layout and use cases for the application to support and create an application based on these requirements, working with business users to refine the application based on business user feedback. The application will include data from one (1) data source, up to three (3) source tables, up to ten (10) master measures, and up to five (5) million rows. The implementation of row or column level security is not included
- **Advisory Presentation – Leading Practices** - Qlik will provide a presentation for basic enablement on the following topics:
 - Application Access for End Users
 - Application Development Lifecycle including Publishing to Production
 - Onboarding New Users

Pre-Requisites

- Acquisition of licenses for Qlik Cloud or QGS SaaS platform
- Customer will provide a named individual(s) for registration to the instructor led training
- Customer will provide access to relevant resources (IdP administrator, existing BI administrator, business analysts, BI developers, database administrator, data architect, etc.) as needed through the project
- Customer will configure identity provider, data sources and existing deployments as needed in a timely manner to support implementation
- Technical prerequisites and source/target setup instructions will be shared following purchase, and the expectation is that those would be completed prior to engagement start

4.5 Qlik Cloud Analytics Starter Service – Migration

Qlik Cloud Analytics- Migration to Qlik Cloud Analytics is intended for Customers who are currently active users of Qlik View or Qlik Sense and may include the following:

- **Deploy and Administer Qlik Sense SaaS Training** – Attendance by up to three (3) Customer personnel of the public Deploy and Administer Qlik Sense SaaS Training
- **Configuration of Tenant.** Qlik will provide configuration of Customer's Qlik Tenant including user authentication either via the Qlik IdP or to accept a compatible Customer identity provider without the use of custom coding, configuration of SMTP, and configuration of Customer user authorization for governing Space access. Qlik will also configure standard Monitoring Applications and standard Demonstration Applications and provide basic enablement to a user on the monitoring of their new Qlik environment
- **Current State Review.** Qlik will work with the Customer personnel to define a target solution design and high-level migration roadmap with the Customer. Qlik will assist with:

- A Baseline inventory and basic analysis of existing Client Managed Qlik Sense applications in one production environment using a Qlik Consulting SaaS readiness utility
 - Identify and present opportunities, risks, and recommended mitigations for migration to Qlik Cloud consistent with leading practices
- **Basic Application Development.** Qlik will work with Customer business users to understand their needs and specific application requirements. Based on this work, Qlik will define a layout and use cases for the application to support and create an application based on these requirements, working with business users to refine the application based on business user feedback. The application will include data from one (1) data source, up to three (3) source tables, up to ten (10) master measures, and up to five (5) million rows. The implementation of row or column level security is not included
- **Advisory Presentation – Leading Practices.** Qlik will provide a presentation for basic enablement on the following topics:
 - Application Access for End Users
 - Application Development Lifecycle including Publishing to Production
 - Onboarding New Users
- **Advisory Presentation – Contextualized Capabilities.** Qlik will provide a presentation in the context of goals shared by the Customer throughout the engagement on the capabilities and practices the Customer may wish to leverage on the QCS platform, and how the Customer might consider leveraging them to meet their objectives

Pre-Requisites:

- Acquisition of licenses for QCS or QGS SaaS platform
- Customer will provide a named individual for registration to the instructor led training
- Customer will provide access to relevant resources (IdP administrator, existing BI administrator, business analysts, BI developers, database administrator, data architect, etc.) as needed through the project
- Customer will configure IdP, data sources and existing Qlik deployments as needed in a timely manner to support implementation
- Technical prerequisites and source/target setup instructions will be shared at the start of the engagement and the expectation is that those would be completed prior to engagement start
- Gather any documents which describe:
 - Your current analytics estate, including architecture, use cases and analytics applications
 - Your data sources, data strategy and data roadmap
 - An outline of what you plan to move to Qlik Cloud
 - Your current processes and analytics operating model
- Where a hybrid environment including a Client-Managed element of Qlik software will be used, Customer will ensure:
 - Servers have internet connectivity to qlikcloud.com
 - Qlik Sense Enterprise Client-Managed versions are either the current version or one of the previous two major releases
 - The Qlik Sense SaaS Readiness application has been run
 - The Qlik Operations Monitor applications has been run

4.6 Qlik Predict Starter Service

Qlik Predict Starter Services are services designed to deliver implementation of a working ML model for Customer's use-case and enablement to Customer personnel. Qlik Predict Starter Service may include the following:

Use-Case Selection: Qlik will work with the Customer to identify a business use-case that is mutually agreed to be a good fit for modeling with Qlik Predict. Specific activities will include:

- Assessment of desired use cases including the amount of data and complexity of data engineering required to achieve good results with an ML model will be carried out with the Customer
- Qlik and Customer will agree on the use-case for this engagement ("Target Use Case") based on a quick analysis of benefits to the business, feasibility, technical complexity, availability and viability of necessary data, and constraints of current software licensing. The selected use-case will be the focus of the creation of the Qlik Predict Model ("Target ML Model") to be delivered during this engagement

Assumptions:

- Customer has one or more business use-cases identified that they believe will benefit from the application of ML modeling using Qlik Predict. Details about the use-case including expected benefits and impact as well as the necessary data sources and transformations should be available

Start Criteria:

- A kickoff meeting between Qlik and all relevant Customer stakeholders required to speak to the business and technical requirements, and other interested parties is scheduled at a mutually agreed upon time and duration
- Customer will have identified a individual(s) who will be primarily responsible for working with Qlik consultants on the creation of the "Target ML Model" and provided the necessary contact information prior to the start of the engagement
- Customer is currently using a licensed and fully functional instance of Qlik Cloud that has been configured and integrated to the extent required to conduct this engagement. Configuration of the Qlik Cloud SaaS tenant and integration with Customer systems including IDP are out of scope for this engagement

Acceptance Criteria

- The Target Use Case will be selected as mutually agreed between Qlik and Customer following activities described in this section.

Enablement-focused ML Model Development: Qlik will work with the Customer to establish a schedule for the presentation of enablement content pertaining to Qlik Predict which Qlik will provide during the course of this engagement. Qlik and Customer will iterate through the development of the “Target ML Model” such that model development activities will coincide with the most recent enablement content presented in a working session following the presentation of enablement content. The Customer may take additional actions between working sessions to further develop the model, and Qlik will review progress and address questions, or issues encountered prior to presenting the subsequent enablement materials. Specific activities may include:

- Establish a mutually agreed-upon schedule for the presentation of structured online enablement content around the preparation and use of Qlik Predict. The schedule may not exceed more than four (4) weeks in total duration unless otherwise mutually agreed
- Iterative development of the “Target ML Model” through a series of working sessions of appropriate duration to complete the model development activities that correspond to the most recently consumed enablement content. The engagement may not exceed fifteen (15) working sessions. Working sessions will typically range from 30 to 60 minutes
- Delivery and overview of the final working model with key Customer stakeholders following the completion of all working sessions. The efficacy and accuracy of the model will be significantly dependent on the quality and relevance of the data provided to train the model. The “Target ML Model” will function as expected in relation to its ability to leverage training data to make predictions against an applied data set. The accuracy of the model in its ability to predict future outcomes cannot be guaranteed

Assumptions:

- Customer will make personnel with a working knowledge of relevant data and data sources available as needed through the course of the engagement to help ensure that the necessary data to train the model is available and appropriately engineered for consumption
- Data engineering activities to manipulate or transform Customer data are out of scope for this engagement. Qlik Professional Services has the ability to provide these services for an additional fee if desired

Start Criteria:

- Completion of Use-Case Selection
- The assigned Qlik Resource has been provided sufficient access to the Customer’s Qlik tenant and any data or business documentation necessary

Acceptance Criteria

- The “Target ML Model” that conforms to the description in this section has been developed in collaboration with Customer personnel

4.7 Qlik Answers Starter Service

Qlik will work with the Customer to configure the Customer’s Qlik Tenant including user authentication either via the Qlik identity provider or to accept a compatible Customer identity provider without the use of custom coding, configuration of SMTP, and configuration of Customer user authorization for governing space access. Qlik will also work with the Customer to configure standard monitoring applications and standard demonstration applications and provide basic enablement to a Customer on the monitoring of their new Qlik environment including:

- Guidance on knowledge base structure including content and space segmentation based on customer use cases
- Assistance in the creation of up to three initial knowledge bases from compatible sources using Qlik Answers
- Assistance in the creation of up to one assistant using Qlik Answers
- Basic guidance on prompting the assistant following creation

Pre-Requisites

The following prerequisites must be met prior to the start of the engagement:

- Acquisition of licenses for QCS or QGS SaaS platform
- Customer must provide access to relevant resources (IdP administrator, existing BI administrator, business analysts, BI developers, database administrator, data architect, etc.) as needed through the project
- Customer must configure identity provider, data sources and existing deployments as needed in a timely manner to support implementation
- Technical prerequisites and source/target setup instructions will be shared following purchase, and the expectation is that those would be completed prior to engagement start

Starter Service includes the following:

- **Cloud Tenant Configuration:** The customer’s Qlik tenant is configured for user authentication using either the Qlik identity provider or a compatible Customer identity provider without custom coding
- **Knowledge Base Guidance:** Qlik has provided up to one (1) working session in which guidance on the knowledge base structure, including content organization and Space segmentation based on customer use cases, is shared. This session will take place in a virtual meeting (e.g. Zoom) unless otherwise mutually agreed
- **Knowledge Base Creation:** Up to three initial knowledge bases are created from compatible sources using Qlik Answers
- **Assistant Creation:** One assistant is created using Qlik Answers
- **Prompting and Use Guidance:** Qlik has delivered up to one (1) working session in which basic guidance on how to prompt the assistant following its creation is provided. This session will take place in a virtual meeting (e.g. Zoom) unless otherwise mutually agreed

4.8 Stitch to Qlik Talend Cloud Migration Coaching

Qlik will collaborate with the Customer to analyze the Customer's existing Stitch environment and provide basic coaching to Customer on the recommended approach to migrate Customer's data pipelines from Stitch to Qlik Talend Cloud. Stitch to Qlik Talend Cloud Migration Coaching includes:

- Creation and validation of a report showing Customer's Stitch environment including existing sources and targets.
- Basic enablement of the creation of a data pipeline within Qlik Talend Cloud.
- Assistance guiding the customer through the creation of a selected data pipeline within Qlik Talend Cloud.

The following prerequisites must be met prior to the start of the engagement:

- Configured Qlik Talend Cloud tenant
- Existing Stitch environment running data pipelines
- Connectivity and accessibility to existing Stitch data sources and targets
- Security clearance for data access and/or network access as appropriate

4.9 Talend Data Catalog Starter Service

Qlik will work with the Customer to provide mentorship and deployment expertise to initiate first metadata management use cases in Customer's environment. Qlik will provide documentation of the performed installation and of the Data Catalog in the Customer's environment along with the defined metadata models, business glossary, metadata management processes, security model based on the roles and responsibilities of the IT stakeholders.

Talend Data Catalog Starter Service is initiated with a kickoff meeting where Qlik will work with Customer's main point of contact to prioritize the areas to address and to validate all prerequisites are met. Following the kickoff meeting, a Qlik Consultant will deliver the following services:

- Set-up and configuration:
 - Review and define Architecture, Design, and Infrastructure prerequisites
 - Review connectivity to metadata sources (up to three systems)
 - Documentation including a write up of installation/configuration
- Application of best practices from the Talend Reference Architecture to Customer's designated environment.
- Enablement and mentorship on core capabilities working with Customer metadata assets including harvesting, stitching, and building a metadata catalog:
 - Creation of a Business Glossary including taxonomy and structure
 - Definition of the logical and physical data models
 - Definition of the metadata model
 - Definition of the metadata repository structure
 - Definition of a security model based on roles of responsibilities of the IT stakeholders
 - Harvesting metadata
 - Stitching and establishing lineage
 - Definition of metadata processes
 - Testing and Validation of metadata sources and targets, metadata processes
- Establish alignment of information across the business and IT stakeholders.

Prerequisites:

- All necessary equipment, resources and personnel are available throughout the duration of the engagement
- Documentation including a description of the initial metadata management use cases and associated requirements has been shared with Qlik
- Agreed engagement schedule
- Downloads of Talend Software install packages have been completed
- Required Talend product licenses are available

Qlik recommends that the following Qlik Learning training courses are completed prior to starting Talend Data Catalog Starter Services:

- Talend Data Catalog Basics
- Talend Data Catalog Advanced